



BENEFICIARease on the Web

Introduction

For the last nine years, JAC have been providing not for profit organizations with systems to enable the management of Beneficiaries, from initial contact to grant fulfilment. All of the systems were based on Microsoft Access and hosted on client servers. The introduction of working across the web has prompted JAC to redesign their entire suite of software using a web front end.

In 2009, a study was undertaken to ascertain the new environment for the redesign. Various packages were analysed and Alpha 5 was chosen due to the rapid development environment that it offered and the fact that it would link with SQL server (the current preferred database engine of JAC)

BENEFICIARease was the second package to be rewritten after our helpline system (ENQUIRease) and completed testing in August 2010.

Web Benefits

- No Microsoft Access licence needed
- No servers needed to host application
- Accessible from anywhere using an Internet Browser
- Lost cost start-up
- All maintenance and backups handled by JAC
- Allow remote workers access via handheld devices (iPad etc)
- Choice of Internet Browsers
- Integration with Adobe PDF formats
- Integration with Google Maps
- Integration with AFD postcode
- Graphical statistics

Why switch?

Due to the nature of the work of Beneficiary organisations and the increased need for remote workers to enter data, the web provides an ideal base for database systems. Microsoft licences are increasing in cost and with more demand placed on servers in the day to day environment, switching to a hosted solution is the way forward.

There is no longer a need to create icons for users, setup their access to the server, configure the security, provide remote access and provide printing facilities.

BENEFICIARease runs in any Internet browser on any platform (Windows / Linux / MacOS / Android) so as long as the user has internet access they can access the system.

There is a small fee for setting up the system and then you either pay monthly or quarterly to use the system. There is no major capital outlay at the start of the project for the software.

JAC have 80 clients across the UK running various databases, this new and exciting environment provides not for profit organizations with a system which is flexible and accessible from any location around the world.

How it works

JAC have purchased a web server which is hosted by UKFast in a secure data centre in London, with a mirrored site in Manchester. UKFast are one of the top providers of hosted solutions in the UK, with a number of high profile clients using them for data storage. This server hosts the application and data and is backed up each night. Data protection is guaranteed using confidentiality agreements.

The server is connected to the web using a fast 100mb line enabling quick response to requests of the users. All data is stored using Microsoft SQL server using transactional processing enabling the data to be recovered in the event of a hardware failure.

Backups can be restored within 15 minutes should the need arise, with 5 versions of the backup available for retrieval.

Each client is given their own section of the server to enable their application and data to be stored securely, no data is shared across the server.

JAC setup the system initially with a user count, the client is then free to create and delete users as necessary up to the user count limit.

Training is provided using both on-site visits and remote webinars with training videos stored on server so that users can refresh their knowledge.

Users then login using their web browser connecting to www.jacwebserver.co.uk, entering their username and password.

Depending on the access granted to the user, they can then use the database as if they were in the office.

All reports and letters are generated using Adobe PDF, and can either be downloaded to the local computer or printed to any printer connected to the local computer.

If required, data can be downloaded into Microsoft Excel for further analysis.

No software is needed on the users computer, the database utilises flash player which needs to be available within the Internet Browser.

All drop down lists and letters are controlled by the Administrator of the database with no interaction from JAC.

Why Alpha 5 I have never heard of it?

Alpha 5 was chosen due to the flexibility of the package and the user base around the world. The product has been around in different forms since 1983 and has been developed by the same family and is still owned by two brothers.

Microsoft has not provided the industry with a development tool for the web which is intuitive to use and allows for rapid development. (In fact, Microsoft uses Alpha 5 themselves!)

We continue to use Microsoft SQL server as this is the industry standard for storing large volumes of data.

For the users of Microsoft Access, you will be familiar with having to logout of the database whenever a change is needed or a report needs to be added. Alpha 5 allows for development without the need for the users to stop working, all the need to do is refresh their browser window and the change is implemented.

For the technical users, Alpha 5 uses code less Ajax to generate the forms and grids within the database and uses action JavaScript to perform complex functions.

New Technology

Most welfare officers who visit beneficiaries need to write reports on their visits and they fill in income and expenditure documentation. This is usually carried out as follows:

- Welfare officer visits the beneficiary and fills in the forms manually
- These are faxed or emailed or posted to head office or the welfare officer logs into the server remotely when they get home to enter the details.
- Head office process the email/fax and enter the data into the database

Imagine the welfare officer entering the beneficiary details using an iPad whilst at the beneficiary, information is immediately available to view at head office and has not been entered twice. (Lowering the overhead on head office and reducing errors) With BENEFICIARease you can enter the information directly into the database. Visitors can login to the database and see any visits that are due. Trustees can login and make judgements relating to beneficiary cases if needed.

The Database in detail

Users login via a secure portal:



User ID	<input type="text" value="Operator1"/>
Password	<input type="password" value="••••••••"/>
	<input type="button" value="Login"/> <input type="button" value="Clear"/>
	<input type="button" value="Change Password"/>
	<input type="button" value="Recover Password"/>

Warning: This computer program is protected by copyright law. Unauthorised reproduction or distribution of this program, or any part of it, may result in severe civil and criminal penalties and will be prosecuted to the maximum extent possible under the law.

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Depending on their user access, various options are displayed on the main screen

BENEFICIARease

Home

- Logout
- Beneficiaries
- Application List
- App Reviews Due
- BEN Reviews Due
- Comp App Reviews
- Comp BEN Reviews
- Grant List
- Visits Due
- Grant Processing
- Welfare Visitors
- Tasks Due
- Suppliers
- Reports
- Statistics
- Setup
- Videos
- JAC Site
- Audit Log

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JAC SUPPORT AND NEWS UPDATES

JAC's offices will close for Christmas on Wednesday 22 December at 5pm and will re-open on Wednesday 5 January 2011.

We would like to wish you all a Merry Christmas and a prosperous New Year.

Please note that the current VAT Rate will change from 17.5% to 20% on the 4 January 2011.

Information and updates from JAC will also be displayed on this page to keep the users informed.

Applications are entered onto the system:

Application/Grant

Main Details

Application Or Grant? Application

App Status Active

Date App Received 02/08/2010

App Processed By Alan

Financial Year

Applied For Income Expenditure Savings Assistance Comms Reviewer Contributor Tasks

Records: 1

Applied For	Amount Applied For
Regular Grant	£200.00

New Record 10 Records per page

All aspects of a Beneficiary are stored for future use

Beneficiary Entry

Client ID 2

Client Status On Hold

Old Reference

Title Mrs

First Name Bertie

Last Name Bassett

Mail Name Mrs Bertie Bassett

Salutation Mrs Bassett

DOB 29/03/1971

Age 39

Gender Male

Nationality British

Birth Country United Kingdom

Contact Method Email

Source Internet

NI Number

Admin Info

Date Created 29/07/2010

Created By Alan

Address Line One 12 Church Walk

Address Line Two Pinchbeck

Address Line Three

Town Spalding

County Lincolnshire

Postcode PE11 3RD

Country United Kingdom

Location Lookup

Landline

Mobile

Email

Fax

Website

TV License

Renewal Date

Number 0

App/Grant Welfare Officer Advice Bank Employment Family Links Eligible Visit Service Loans Comms Tasks Visit Reviews CommsPref Payment Membership Details Power Of Attorney

Click here to search...

Records: 1

App Status	Grant Status	Date Received	Purpose
			Debts

All Records per page

All related information can be retrieved from the beneficiary record:

- Applications
- Grants
- Communications
- Service history
- Welfare Officers
- Advice
- Bank Details
- Employment
- Family
- Links
- Eligible
- Visit
- Service
- Loans
- Tasks
- Visit Reviews
- Communication Preference
- Membership Details
- Power of Attorney

Visits are flagged to visitors when they login so that they can plan their visits and see beneficiary details as needed.

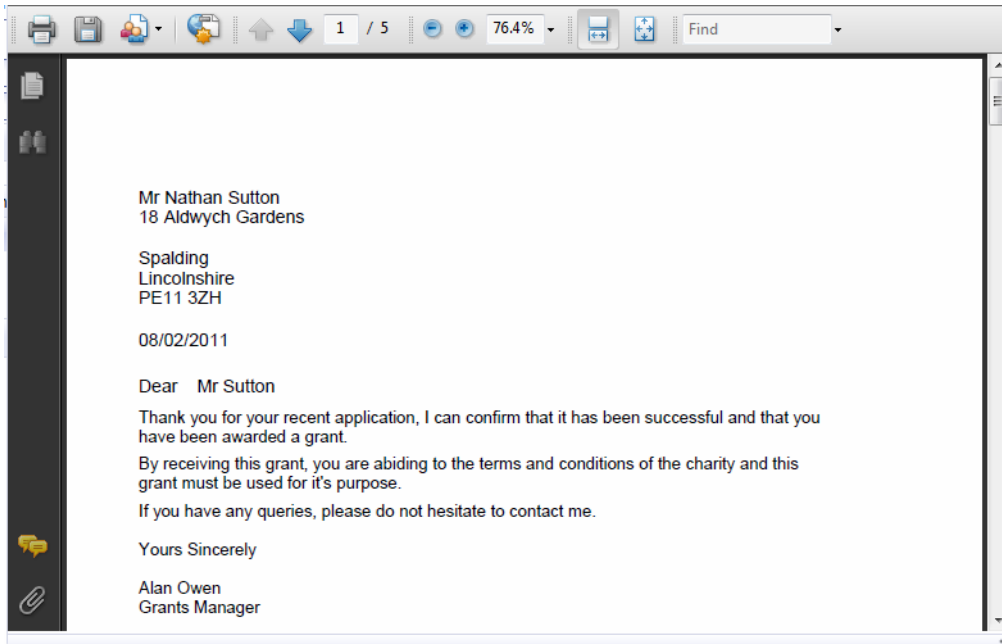
The screenshot shows a web application window titled 'Visits'. It contains a form with the following fields: 'Visitor' (a dropdown menu), 'Visit Date' (a date picker), 'Visit Time' (a time input field), and 'Visit Status' (a dropdown menu). Below the form is a rich text editor with a toolbar including buttons for Bold (B), Italic (I), Underline (U), and various text alignment and color options. An 'Upload Report' button is positioned at the bottom of the editor area. The label 'Visit Details' is visible on the left side of the editor.

All grants that have been agreed are then queued for payment

The screenshot displays a search interface for grant processing. It includes search criteria for 'Next Payment Date' (with 'From' and 'To' date pickers), 'Financial Year' (a dropdown), 'Total Grant Amount' (a text input), and 'Amount Payable' (a text input). A 'Search' button is located at the bottom of the search criteria section. Below the search criteria, there are 3 records displayed in a table format. Each record includes a 'Grant Status' (Active), 'Client ID', 'Payment Method', 'Purpose', 'Total Grant Amount', and 'Next Payment Date'. Action buttons are provided for each record: 'Full Listing', 'BACS Listing', 'Chq Assign', 'Chq Listing', 'Cheques', 'Letters', and 'Payment Update'.

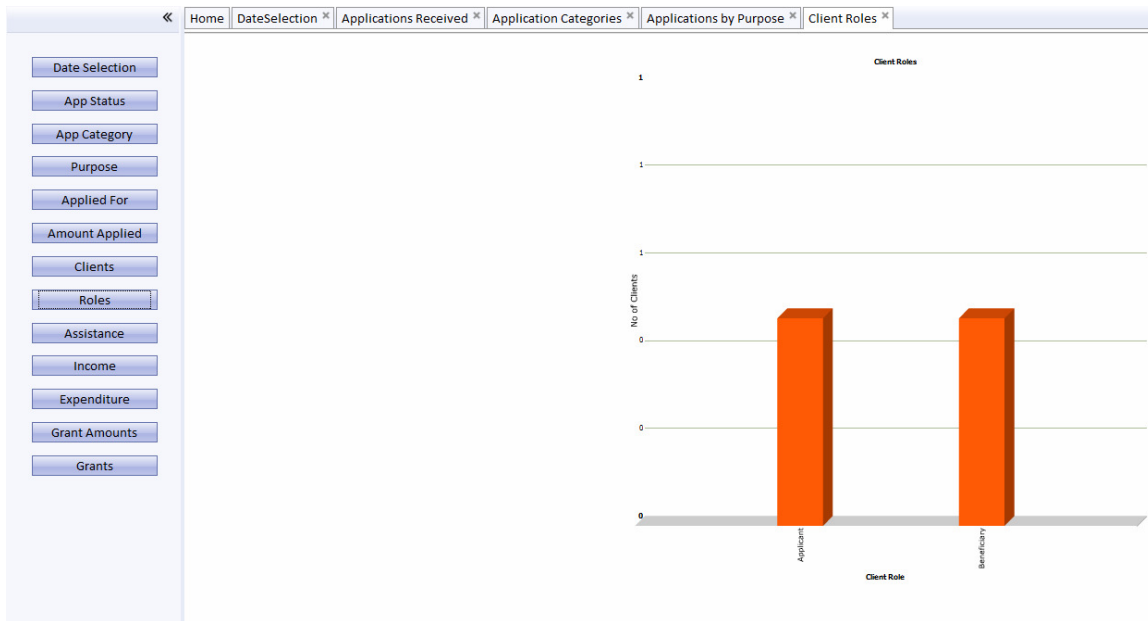
Grant Status	Client ID	Payment Method	Purpose	Total Grant Amount	Next Payment Date	
Active	Mr Bertie Bassett	BACS	Debts	200	06/07/2010	Full Listing BACS Listing Chq Assign Chq Listing Cheques Letters Payment Update
Active	Mrs Jenny Owen	BACS	Debts	800	30/08/2010	
Active	Mr Nathan Sutton	Cheque	Debts	1000	03/08/2010	

Cheques and letters can be produced



BACS and accounts files can also be produced as excel documents.

Analysis via statistics can be produced at the touch of a button



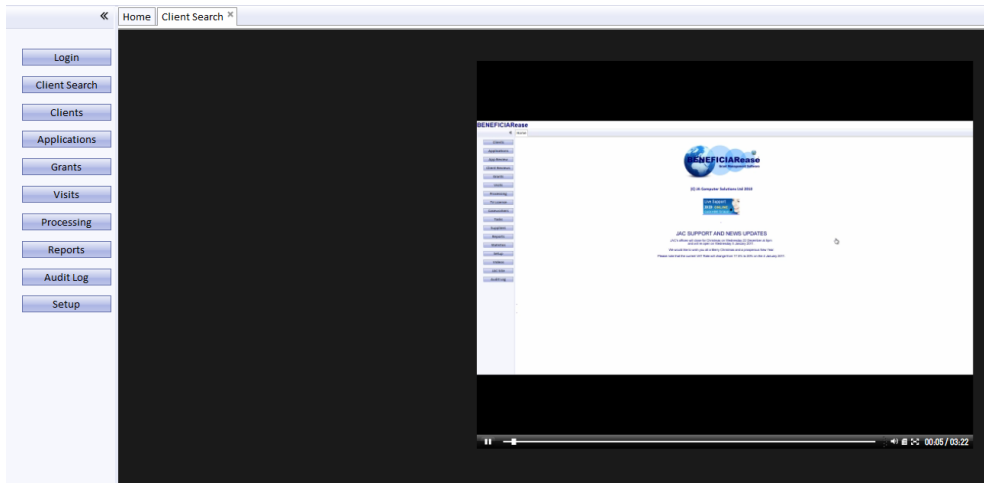
Reports can be produced. At the touch of a button

Records: 1

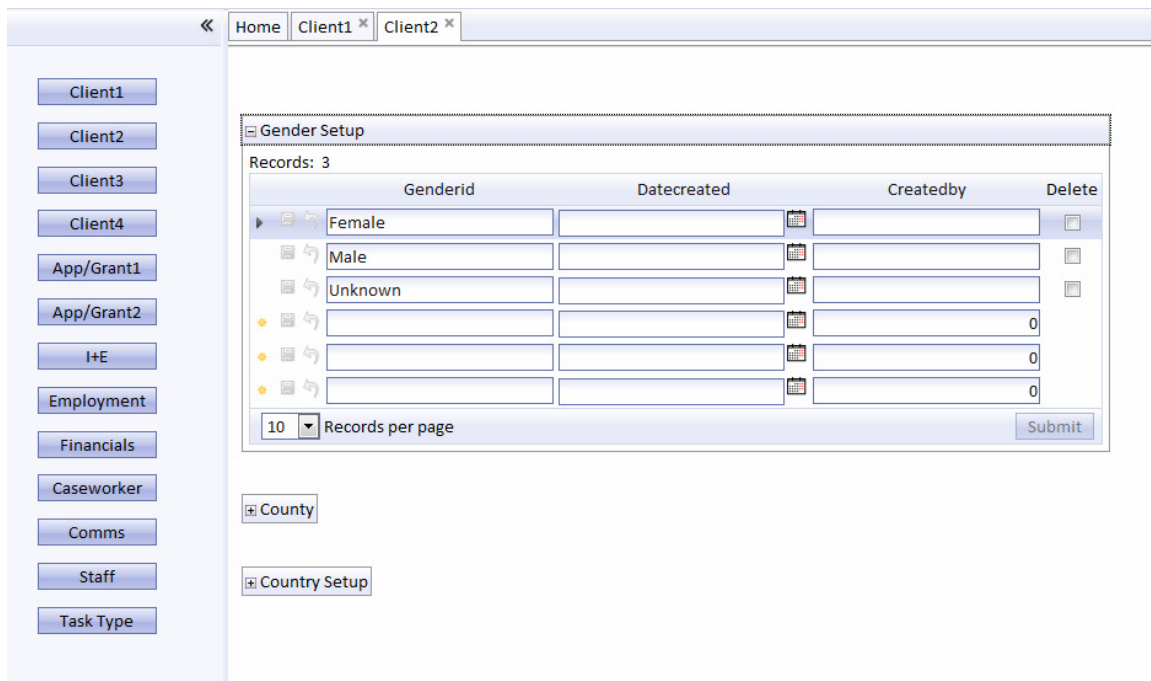
Report Description	Date From	Date To	Delete
Applications Received	<input type="text"/>	<input type="text"/>	Preview Report <input type="checkbox"/>
	<input type="text"/>	<input type="text"/>	Preview Report
	<input type="text"/>	<input type="text"/>	Preview Report
	<input type="text"/>	<input type="text"/>	Preview Report

10 Records per page

Help is always available via our video section



All setup is handled by the administrators of the database



Why JAC

The founder of JAC has been providing systems to charities for twenty years and has a vast knowledge of the not for profit sector, in 2011 JAC celebrate 10 years in business and we are the only company in the UK offering a web based beneficiary management system.

We have a UK based help desk with support available via email as well as our live chat facility.

With over 80 organizations using systems from JAC, you can be satisfied that you will receive a professional service that you can rely on.

For more information or to test drive the database, call Jenny Owen on 0800 7318764