Preparation of data for importing into U3A Beacon

Your Regional Support Coordinator will have been informed that your U3A has applied to use Beacon. Please contact him or her regarding the preparation of your data.

The data-prep procedure consists of 4 steps which we call 'The 4Cs'. Data needs to be...

C1 - **COMPLETE**   **This is the responsibility of the U3A.**
        Whatever information you collect about your members, groups, finances etc. make sure that you have as few 'gaps' as possible. This doesn't matter as far as migration is concerned but we suggest that 'going live' with Beacon is a good time to consolidate.

C2 - **CORRECT**   **This is the responsibility of the U3A.**
        Check that there are no 'obvious' errors in phone numbers, postcodes, email addresses etc and that 'spacing' is consistent. Have data of the same type 'looking the same' (eg dates as dd/mm/yyyy etc). If more than one member lives at the same address ensure that the address appears identical for both. Check for spelling mistakes, typos etc. etc.

NOTE: C2 TENDS NOT TO BE DEALT WITH AS THOROUGHLY AS IT MIGHT. PLEASE INVOLVE SEVERAL PEOPLE IN THIS TASK.   When C1 and C2 have been completed the data needs to be **C3** - **CONVERTED** & **C4** - **CHECKED.**

Having thoroughly completed C1 and C2 you now have a decision to make:
If you are POSITIVE that you have the skills (and the inclination!) to do the C3 Conversion yourself, continue reading from ********
If you are at all uncertain that you have the skills please ask that the conversion be done for you.
Please contact your Regional Support Coordinator with that request **ASAP**
Make sure that you complete C1 and C2 before passing it over for C3 and C4. You will be notified of progress!
During C4 checking it is likely that some errors will be found. If 'local knowledge' is needed to correct them then you will be contacted.
When declared Error-Free, your data will be transferred to the Beacon system and you will have a Live Site!

**** For U3As with the necessary level of Excel skills (and the inclination) to do the Conversion (C3) yourself, please let your Regional Support Coordinator know when you intend to start on this task.

C3 - **CONVERSION**   **Please read the information below thoroughly and follow the instructions carefully**.

You will probably have the data (on which you have done your C1 and C2 checks) in one or more workbooks.

Before you do any more please ensure that the sheets are plain and unembellished.
Use the Clear Formats command to remove any formatting (bold, borders, alignment, background colour, etc.) or filters, turn off hyperlinks for e-mail addresses and do not split or freeze rows or columns.

Some general notes about data conversion
Date columns must be text in the form dd/mm/yyyy (i.e. 10 characters)
Telephone and mobile numbers must be text (not numbers).
Capitalisation will NOT be altered during import so ensure that names, addresses etc. are already keyed in with the correct capitalisation.
Postcodes must use only capital letters, digits and a single space. The inbound part is checked against the Royal Mail list: the outbound part is only checked for format (number, letter, letter).

In addition to this document you will need to use the Excel Template   '20170813 data prep template'

Make a copy in case you need to start again! Save the workbook you are going to be using and key-in **your U3A name as part of the filename.**

Please familiarise yourself with the content of both this document and the template before you attempt to move your data.

Your task is to copy & paste your 'C1&C2-ed' data into the template column by column, sheet by sheet.

The template is auto-interactive and the Settings sheet will react to the data you copy into the first 4 sheets.

Do not add sheet titles or other additional text within the workspace. Other than your data (which should start in Row 2) the only 'extra' should be the existing column headers. (However during copy/paste it may be easiest, when copying col-by-col, to do it in such a way as to have YOUR col. headers pasted into Row2. When you have completed the sheet you can then delete Row 2, leaving the sheet as it needs to be for data transfer.)

The template workbook consists of five sheets as follows:

Sheet Name	Contents	Status
members	Names, addresses, and contact details etc. of members.	Required
venues	Details of all the venues you use for group meetings, including address, telephone numbers, contacts, email, accessibility.	Optional
groups	Name, number of leaders, venue identifier, meeting dates and times	Optional
finance	Transaction details: date, time, amount, related members/groups	Optional
settings	All the information (other than that above) which is needed to set-up a U3A's Beacon site: membership classes, status, bank account names etc. The amount of information required will depend on how many data sheets you are submitting. The settings sheet will guide you to give the required information. When all is complete you will see a 'Ready' message.	Required

Full column by column details for each sheet appear below.

members

Col	Req.	Column header	Type & max length	Comment
A	*	mem_no	Integer	Member number Must be unique
B		pmem_no	Integer	Partner's number (if any). Needs identical address as member. Must exist and be unique
C		title	Text5	Can be blank
D	*	forename	Text25	Can contain more than one name eg Mary Jane
E	*	surname	Text25	
F		initials	Text5	Upper case, no spaces
G		suffix	Text5	e.g. MBE, MP Upper case
H		familiar_name	Text15	Can be blank
I		sex	Text1	M F U or blank
J	*	memclass	Text25	**I**ndividual, **J**oint and **A**ssociate are provided. Others (eg **H**onorary) can be used
K	*	status	Text25	**C**urrent and **L**apsed are provided. Others (eg **R**esigned, **D**eceased) can be used. Declare all.

Col	Req.	Column header	Type & max length	Comment
L	*	house	Text25	House number or name. Must not be blank.
M		address1	Text30	Can be blank (but usually won't be)
N		address2	Text30	Must be blank unless address1 is in use
O		address3	Text30	Must be blank unless address2 is in use
P	*	town	Text25	Must not be blank
Q		county	Text25	Can be blank
R	*	postcode	Text10	Must not be blank. (special format)
S		telephone	Text15	Can be blank
T		mobile	Text15	Can be blank
U		email	Text47	Can be blank (special format – needs an @)
V		giftaid_date	Text10	dd/mm/yyyy
W		emergency	Text255	Can be blank
X		affiliation	Text25	Name of the "Other" U3A for Associate members
Y		notes	Text	Can be blank
Z		joined	Text10	dd/mm/yyyy
AA		renew	Text10	dd/mm/yyyy (must be non-blank for non-current members)
AB-AE		*Custom fields 1-4*	*Text50*	Must be named e.g. custom1-Transport
AF-AI		*Poll fields 1-4*	*Text1*	Yy1 Nn0 Must be named e.g. poll1-Committee

venues

Col	Req.	Column header	Type & max length	Comment
A	*	name	Text50	Must be unique Must not be blank
B		address	Text50	
C		postcode	Text10	
D		telephone	Text15	
E		contact	Text50	
F		email	Text47	
G		website	Text47	
H		notes	Text	
I		is_private	Text1	Yy1 Nn0
J		is_accessible	Text1	Yy1 Nn0

groups

Col	Req.	Column header	Type & max length	Comment
A	*	name	Text30	Must be unique Must not be blank
B		faculty	Text30	If present, must match the name of a faculty (as declared on settings sheet)
C		status	Integer	1=Inactive, 2=Active, defaults to Active.
D		leader	Integer	if present, must be the mem_no of a member
E		venue_name	Text50	must exactly match the name of a venue
F		info	Text	
G		meets_when	Text50	e.g. 2nd Tuesday morning
H		start_time	Text5	HH:MM format
I		end_time	Text5	HH:MM format
J		max_members	Integer	
K		notes	Text250	
L		contact	Text30	
M		join_online	Text1	Yy1 Nn0 blank=N
N		waiting_list	Text1	Yy1 Nn0 blank=N
O		notify	Text1	Yy1 Nn0 (Y = group leader is notified by email)

finance

Col	Req.	Col. header	Type & max length	Comment
A	*	t_date	Text10	dd/mm/yyyy must not be in the future
B	*	account	Text15	must match the name of an account
C	*	amount	Decimal	no currency symbol, positive for credit to account
D	*	payment_type	Integer	1=cheque, 2=cash, 3=PayPal, 4=standing order, 5=direct debit, 6=BACS (or inter-bank transfer), 7=credit card (for payments)
E	*	category	Text25	1 = membership, 2 = donation, other categories may be used but the maximum must be defined in the settings worksheet.
F		payee	Text30	
G		cheque	Text10	
H		details	Text50	
I		mem_no	Integer	must exist
J		giftaid	Decimal	see **amount** above
K		claimed	Text10	date when gift aid claimed as dd/mm/yyyy must not be in the furtue

settings

This worksheet will change as you use the workbook. At the moment no data is loaded so cells B2:B5 show "N". As you load data, these will change to "Y". Most entries A7:A21 include the comment "ignore". As you load data, these will change to require relevant data. As you provide it, cells C7:C21 will change (back) to "ready". When all C cells contain "Ready", you will receive a File Ready comment in B23.

U3A name		U3A name must be entered
members	N	Ready
venues	N	Ready
groups	N	Ready
finance	N	Ready
settings	Y	Ready
mem_no for life		Ready
No finance data - ignore		Ready
Next mem_no	1	Ready
No finance data - ignore		Ready
No membership data - ignore		Ready
Membership account	Current	Ready
No group data - ignore		Ready
No group data - ignore		Ready
Contact name		your name - probably
Contact email	_	your email - probably
No membership data - ignore		Ready
No membership data - ignore		Ready
No group data - ignore		Ready
No finance data - ignore		Ready
No finance data - ignore		Ready

3 actions to complete

Custom fields	custom-; custom-; custom-; custom-	custom-	1
Polls	poll-; poll-; poll-; poll-	custom-	2
		custom-	3
		custom-	4
		poll-	1
		poll-	2
		poll-	3
		poll-	4

If you are using either Custom fields or Polls, you must add the names you wish these fields to have after the hyphens in the column headers in the relevant columns (AB to AI in the members sheet). These entries will show in this section.

C4 - Formal Checking   When C1, C2 and C3 are complete **and your 'prepared-data' workbook been OKed by your RST**, please notify migration@u3abeacon.org.uk.

You will receive an invitation to send your data to the team to be formally Checked (C4).
Send your data password-protected (just protect the file, not each sheet). Please send the password in a separate email AND SEND THAT EMAIL BEFORE the email with your data attached.

During C4 checking it is likely that some errors will be found. If 'local knowledge' is needed to correct those errors then you will be contacted.
When declared Error-Free, your data will be transferred to the Beacon system and you will have a Live Site.

Well done!

V5.3 13/08/2017