

Preparing data for Beacon using BDMFC

Important: Please take note:

- * When sending data by email, ensure that it is password protected with the password sent in a separate email. Only send to one person at a time, not to multiple addressees.
- * Never work on the only version of your data. Always make a copy before making any changes in case you need to start again.

Your Regional Support Coordinator will have been informed that your U3A has applied to use Beacon. Please contact him or her (or your supporter if you know who that is) regarding the preparation of your data.

4 steps, which we call ‘The 4Cs’, lead up to the successful import of your data into Beacon.

C1 Complete	your data needs to be complete (or as complete as you can make it!)
C2 Correct	not only ‘reflecting reality’ but also ‘correct in its presentation’ – see below
C3 Convert	this is achieved by using the BDM File Converter – details below
C4 Checked	this ‘within region’ checking will be done by (or arranged by) your supporter

Each of these steps has a section below.

C1 Complete (U3A responsibility)	Whatever information you collect about your members, groups, finances etc. make sure that you have as few ‘gaps’ as possible. This doesn’t always matter as far as migration is concerned but we suggest that ‘going live’ with Beacon is a good time to consolidate. It is for each individual U3A to decide what data they are going to import into their Live site.
C2 Correct (U3A responsibility)	<p>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’ (e.g. 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.</p> <p>Date columns must be text in the form dd/mm/yyyy (i.e. 10 characters)</p> <p>Telephone and mobile numbers must be text (not numbers).</p> <p>Capitalisation will NOT be altered during import so ensure that names, addresses etc. are already keyed in with the correct capitalisation.</p> <p>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).</p> <p>Many U3As find this stage difficult. The skills required have more to do with proof-reading than IT.</p>
C3 Convert (U3A and/or Supporter)	<p>Conversion is carried out using some software specially written for this stage. You will be required to rename some of your data columns and some of your data sheets. If you are not happy about the idea of doing this kind of work, please contact your Supporter or Regional Support Coordinator who will arrange for this to be done for you.</p> <p>No need to read more but do discuss data-prep now with your supporter.</p> <p>OR - If you are POSITIVE that you have the skills (and the inclination!) to do the C3 Conversion yourself, the following pages will explain the process, so continue reading:</p>
C4 Checking (Supporter/Migration Team)	See page 5 for more details

C3: Convert (BDM File Converter User Guide)

Introduction

This document accompanies the BDM¹ File Converter (Excel) workbook which forms one of the main tools to help you to start using Beacon to manage your U3A data. We assume that you have some data in an Excel file. If you do not have your data in an Excel file, please see **Appendix A: Data not in Excel format**. If you not have any data to upload (perhaps you are a new U3A) please see **Appendix B: No data to upload**.

You will use the BDM File Converter workbook to load your data and undertake some simple data adjustments. The workbook will then save your data in the format required for upload to Beacon (upload will be **after** C4 Checking by your regional supporter)

Your U3A Details

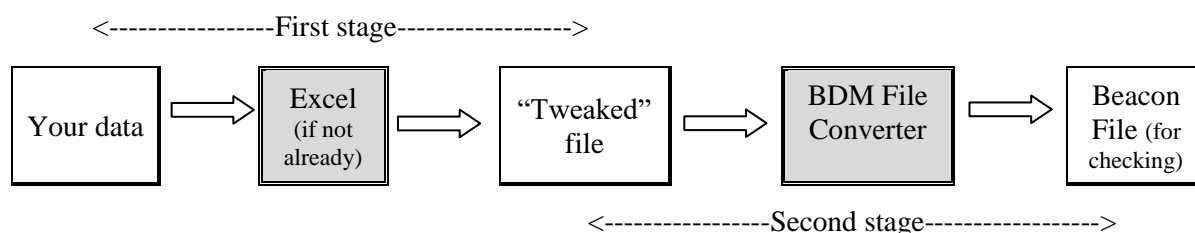
The Beacon system holds details of around 200 U3As, a number which grows by about two every week. To keep these details separate, the data for each U3A is held in a separate “site”. Each site is set up to reflect how you run your U3A. It holds your name and the start dates of your financial and membership years etc.

When you open the BDM File Converter workbook, the first sheet you will see is U3A Details. All U3As need to complete the first section; most U3As will then complete one or more of the following sections. You need to do this first **before** you load any data into the workbook. See **Appendix D: U3A Details**. Do this now.

Your Excel data

Before your data can be loaded into the BDM File Converter workbook you will need to “tweak” it. Every U3A holds its data in slightly different formats. Exactly where the data is does not matter e.g. the order of the columns. Nor does it matter if you hold members data in one workbook and groups and venues in different ones.

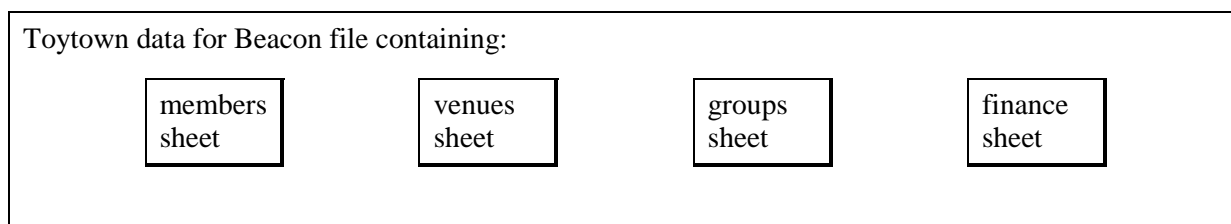
To cope with this variety of data, ‘tweaking’ consists of you changing the names of the sheets holding the data, and the column headers within those sheets, to the names we use. (**Appendix E: Sheet and Column names** explains these in detail). So, 2 ‘stages’ as follows:



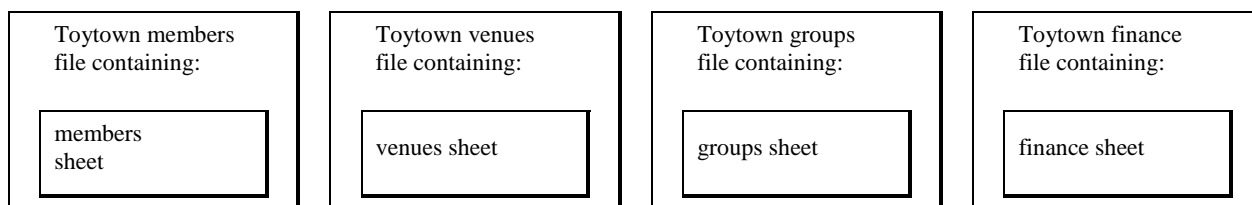
¹ Beacon Data Migration

First stage: preparing and tweaking your data file

All U3As will have member related data to upload; some will also have data relating to venues, groups and finance. Your data may all be in one Excel workbook on separate sheets:



or the sheets may each be in their own workbook:



This does not matter. The only thing which matters is that the **sheet names** correctly identify your data as **members**, **venues**, **groups** and **finance**. So the first thing to do is to change your sheet names to these values.

Within each sheet your data should have headings in row one defining what kind of data is in that column e.g. forename. See **Appendix E: Sheet and Column names** for a list of these sheet names and headers. Open your file(s) and make changes as necessary e.g. change **firstname** to **forename**. Save your file(s).

Second stage: building the Beacon file

Open the Excel file BDM File Converter and follow these steps.

U3A Details

- make sure that you have completed all the necessary entries in the first sheet **U3A Details**. You should have done this “on page one”. If necessary, see **Appendix D: U3A Details** and do what is necessary now **before** you load any data.

Loading your data

- go to the sheet Toolbox and click on the button **Click for the File Converter Toolbox**
- click on the Open Conversion Tools button
- click on Open Data File load your (first) data file
- click on a sheetname button
- click on Load Selected Sheet button(s)
- if you have loaded all the data from this file, click on Close Data File
- if you have data in other files, repeat the Open, Select, Load, Close sequence until all the data you wish to upload to Beacon is held in the BDM File Converter workbook.

Click on the workbook “behind” the Toolbox form² and look at the Report sheet. This shows you any errors which are present and notes which sheet they appear on. A single error will appear against “Address split” until you have carried out the address split (this is dealt with below). If you have other errors, look at each sheet in turn. Errors are clearly labelled “Error!” in bold yellow against a red background. Take appropriate action. It may be that the data beside “Error!” is wrong or it may be that the fault lies elsewhere. For example, if you mistype a Faculty as “Art” rather than “Arts” it will show as an error: if you mistype the Faculty declaration in U3A Details, all groups for that faculty will show an error.

The House/Street Split

When you have cleared all other errors and only the Address Split error is showing, you need to use the House/Street Split tool to make adjustments to your address data³.

- click on the button **House/Street Split**

The tool looks at the data in address1 and attempts to split it between data relating to the house and data relating to the street. It is successful in about 95% of cases but we need human input (and local knowledge) for the other 5%. Your data will be sorted so that what needs adjustment mostly appears at the top. For a branch of 400 members this will only be about 20 addresses. Go to the data sheet members and look at your address data⁴.

Your address data will be presented so that the addresses likely to need a “nudge” from you are at the top. These will be addresses with only one or two words to cover both house and street and longer addresses which lack both numbers and key word such as “Cottage”.

The software splits the data as best it can but you can enter “L” or “R” in the column headed **xnudge** to move the split one “word” to the left or right. For example if you see:

house	xnudge	street	address1
The Old Curiosity Shop Old		Kent Road	The Old Curiosity Shop Old Kent Road

add “L” to the **xnudge** column to move the split point one word to the left:

house	xnudge	street	address1
The Old Curiosity Shop	L	Old Kent Road	The Old Curiosity Shop Old Kent Road

The change will take effect as soon as your press **Enter** or **Down Arrow** to leave the cell.

Check the addresses line by line. When you reach addresses with street numbers you will probably have corrected all you need to correct. The only kind of address you are likely to miss would be:

Trump Towers 5th Avenue

where the number relates to the street name rather than the building number. If you do have numbered streets in your area, look at those addresses carefully and nudge as required.

Please click on the form again⁵.

² Mac users: close the Toolbox to look at the data.

³ Mac users: go to the Toolbox sheet and re-start the Toolbox.

⁴ Mac users: close the Toolbox to look at the data.

⁵ Mac users: go to the Toolbox sheet and re-start the Toolbox.

Saving the Beacon File

Click on “Save Beacon Data File” and the Toolbox will:

- copy your data sheets to a new file
- save this new file using your U3Aname, a timestamp, a data type indicator (e.g. MVG to show that it contains members, venues and groups)
- close the new file.

You can now:

- close the File Converter
- close the BDM File Converter workbook
- send your Beacon file as advised for checking and upload. **See C4 Checking** below

C4: Checking

Your new Beacon file now needs to be C4-checked by your supporter.

Please arrange that with him/her and make whatever corrections might be necessary.

The corrected data-file will be returned to you and you will be ‘data-ready’, having completed C1-C4! You are then ready for Site Creation and Data Import (SC&DI)

Site creation and data import

To trigger SC&DI, inform migration@u3abeacon.org.uk that you are data-ready and include the name of your ‘checker’.

You will then receive an invitation to send your data to a member of the migration team.

Send him/her your data-file (password-protected - just protect the file, not each sheet). Send the password in a separate email. Do not copy such emails to anyone else.

During the import of your data it is possible that more errors will be found. If ‘local knowledge’ is needed to correct those errors then you will be contacted.

When error-free, your data will be transferred to the Beacon system and you will have a Live Site.

You will be informed of this in an email sent by the person doing your SC&DI. Attached will be some documents and instructions as to how to proceed. The data-files which were used in the import procedure will be sent to you and the ones held by the migration team member/s will be deleted from their system/s.

Your supporter will probably continue to offer help and advice during the early days of your live site. Thereafter, the User Forum is the place to go to post any queries you may have about the system. You may well have been a regular visitor to the forum during your Demo and Applied stages but, if not, this is where it can be found <https://forum.u3abeacon.org.uk>

Enjoy Beacon!

Migration Team

Beacon

Spring 2018

Appendix A: Data not in Excel format

Although most U3As hold their data in Excel format, we do not assume that you have skills in Excel. If you read anything which seems to require more skills than you can call upon, please get in touch with us and we will provide whatever assistance you require, up to and including doing almost everything for you.

If your data is held in a database, use the export facilities to download your data into one or more .csv files. These can be read by Excel. Read your file(s) into Excel and there is your Excel file. Return to the main document and find the section **Your U3A Details**.

If your data is held in a Word table, you can mark this table and copy it into Excel. Do this and return to the main document and find the section **Your U3A Details**.

Appendix B: No data to upload

If you have no data to upload, you can still use the BDM File Converter workbook; you will just use it in a simpler way. Go to the main document and find the section **Your U3A Details**.

Appendix C: Complete and Correct

Before you do anything else with your data you should check it to see that it is **complete** (e.g. no dittos or blank cells) and **correct** e.g. if one member lives at 11 High Street and their spouse lives at 11 High St. They do not live at the same address as far as data-import is concerned! The answer is to avoid abbreviation⁶. Similarly Av is not the same as Ave. A lower case L is not a 1 and there is a difference between a capital O and a 0.

If you have anyone with proof-reading skills, they would be a great help to you.

Appendix D: U3A Details

The first sheet in the BDM File Converter workbook is called U3A Details. It holds the information which defines how your U3A is organised.

All U3As: your U3A name, the starts of your membership and finance years, the contact details for your Beacon Site Administrator. Also information relating to your membership data: memclass and status names.

Groups: if you use them, aliases for group and group leader; also faculty names.

Finance: the start year of financial data being uploaded, your **internal** bank account names⁷ and your finance categories e.g. subscriptions, donations.

Custom fields: If you need to use custom fields, name them here and enter your data under the relevant column in the members sheet. **ONLY** define custom fields if you have data which cannot be stored in the notes, perhaps in conjunction with a poll.

Polls: **ONLY** use a poll if you have data ready to upload. Enter 1 to set the poll TRUE for this member, otherwise leave it blank. You can create as many polls as you like after your site is LIVE. You can delete them when you have finished with them.

Next mem_no (rarely used): Beacon will normally allocate the next available number to the next member. If you wish this to be a higher number, enter your preferred number here. From that point on new members will be allocated the next free number.

⁶ We make an exception for Apt as Apartment is so long

⁷ i.e. "groups", "events" etc. We do NOT want sort codes etc.

Appendix E: Sheet and Column names

sheet name: members			
header ⁸	type ⁹	comment	
mem_no*	integer	Each must be unique. You may leave all of these blank for now.	
title	text5	Can be blank	
forename*	text25	Can contain more than one name e.g. Mary Jane	
surname*	text25		
initials	text5	Upper case - no spaces, no full stops	
suffix	text5	e.g. MBE, MP Upper case - no spaces, no full stops	
familiar_name	text15	Can be blank	
sex	text1	M F U or blank (if blank will be generated from title)	
memclass*	text25	Individual, Joint and Associate are predefined.	
status*	text25	Current, Lapsed, Resigned, Deceased are predefined.	
house_street*	text50	Must not be blank. House name/number and street/village.	
address2	text30	Must be blank unless address1 is in use on this row	
address3	text30	Must be blank unless address2 is in use on this row	
town*	text25	Must not be blank	
county	text25	Can be blank	
postcode*	text10	Must not be blank. Special format	
telephone	text15	Can be blank	
mobile	text15	Can be blank	
email	text47	Can be blank (special format – needs an @ etc.)	
giftaid_date	text10	dd/mm/yyyy (date when Gift Aid declaration was signed)	
emergency	text255	Can be blank	
affiliation	text25	Name of the “Other” U3A for Associate members	
notes	text	Can be blank	
joined	text10	dd/mm/yyyy (if blank will be set to the upload date)	
renew*	text10	dd/mm/yyyy (must be non-blank for non-current members) Will be set to first day of next membership year for current.	
Custom fields 1-4	text50	Must be declared in U3A Details	You can only use Custom and poll fields if you have data to upload.
Poll fields 1-4	1 or blank	Must be declared in U3A Details If “1”, true, otherwise false	

⁸ A “*” following the header indicates a **required** column.

⁹ A figure following the type shows the maximum **length** of the entry.

sheet name: venues		
header	type	comment
ven_no*	integer	Must be unique. Venue number.
name*	text50	Must be unique Must not be blank
address	text50	
postcode	text10	Special format
telephone	text15	
contact	text50	
email	text47	Must look like an email address
website	text47	Must look like a URL
notes	text	
is_private	1 or blank	If "1", true, otherwise false
is_accessible	1 or blank	If "1", true, otherwise false

sheet name: groups		
header	type	comment
name*	text30	Must be unique Must not be blank
faculty	text30	If present, must match the name of a defined faculty
status	integer	1=Inactive, 2=Active, defaults to Active.
leader	integer	if present, must be the mem_no of a member
ven_no	Integer	must exist as a ven_no in the venues table (or be blank)
info	text	
meets_when	text50	e.g. 2 nd Tuesday morning
start_time	text5	HH:MM format
end_time	text5	HH:MM format
max_members	integer	
notes	text250	
contact	text30	
join_online	1 or blank	If "1", true, otherwise false
waiting_list	1 or blank	If "1", true, otherwise false
notify	1 or blank	If "1", true i.e. the group leader is notified, otherwise false

sheet name: finance		
header	Type	Comment
t_date*	text10	dd/mm/yyyy - must not be in the future
account*	text15	must match the name of an account
amount*	decimal	no currency symbol, positive for credit to account
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)
category*	text25	membership donation are pre-defined. Other categories may be used but the maximum must be defined in the U3A Details worksheet.
payee*	text30	
cheque	text10	
details	text50	
mem_no	integer	must exist
giftaid	decimal	amount eligible for Giftaid (also see amount above)
claimed	text10	dd/mm/yyyy - must not be in the future