

Preparation your data for importing into u3a Beacon

1 Introduction

Having applied to use Beacon the next phase includes moving your data onto Beacon – data preparation and migration. You will have been allocated a Migration expert to assist with this phase, although in some cases your Supporter will also be in the Migration Team. Your Migrator will be creating and setting up your Beacon live site.

In order to do this your data will need to populate an Excel template. After studying this guide discuss and agree with your Supporter and Migrator an approach. This could vary between giving us “what you have as it is” to populating the template with your data. Note also that, depending on their experience, your Supporter will be working with your Migrator in data preparation.

First some important best practice. If you email your data to the Beacon Team (or anyone else) and it includes personal information – names, addresses, phone numbers – then *password protect the file* and email the password separately. The Appendix has more on doing this with Excel.

a) Check that your data is Up to Date, Accurate & Complete

Whatever information you collect about your members, groups, finances, etc. make sure that you have as few ‘gaps’ as possible. This may not matter as far as migration is concerned but ‘going live’ with Beacon is a good time to consolidate.

Using the guidance in section 2 below, check that there are no obvious spelling mistakes or errors in phone numbers, post codes, email addresses, etc. Also that ‘spacing’ is consistent and that data of the same type ‘looks the same’ (e.g. dates). If more than one member lives at the same address, ensure the address is identical for both.

Do it yourself or have the Beacon Team do it for you?

Study the steps below. If you feel you have the skills (and the inclination) to populate the Migration spreadsheet template yourself, or give it a go, then by all means proceed.

Alternatively, the conversion can be done for you. Just send what you have (password protected – see above). Some errors are invariably found and if ‘local knowledge’ is needed to correct them you will be contacted. When declared error-free, your data will be transferred to the Beacon system and you will have a Live Site!

b) Copy your data into the Excel Template

Copy your data into the template file that accompanies this guide. Populating the template doesn’t require any particularly advanced spreadsheet skills, other than a systematic approach and an attention to detail.

c) Add missing information

Add any missing information to the template using the guidance in the worksheet sections below. Not all columns in the Excel file need to be completed – those that are required have a tick in the ‘Req.’ column and are highlighted yellow in the Template.

d) 1st stage checking

When you think that your data is complete, do a thorough check to make sure that all the required information has been supplied and is in the correct format. There are some tips in the Appendix to help you with this. It is a good idea to involve one or two other people in this stage of checking.

e) 2nd stage checking

When you have completed your own checks, forward a password protected copy of the file to your Migrator (and Supporter if they are helping) for additional checking (see the Appendix for how to do this). It is likely that some errors will be found and if ‘local knowledge’ is needed to correct them you will be contacted for clarification.

f) Migration

After the data has been checked and any corrections made you give the go-ahead to your Migrator. After migration you will be sent the Beacon Live Site 'What To Do Now' document which describes how to complete your Beacon set-up. Your Supporter will be notified that your site is live.

Be aware that charging for Beacon currently starts the on the 1st of the month following the month you go live. If this is issue for you, and it is towards the end of the month, consult with your Migrator about delaying.

2 General notes about data conversion

- Make a copy of the original template file and during your work in case you need to start again or go back a step. Save the workbook that you are going to be using and include your u3a name as part of the filename.
- Before copying any data into the template, first complete the u3a_Details worksheet, see below
- Text columns have a maximum width. This is indicated below by e.g. TEXT25 meaning a maximum of 25 characters for an entry.
- Please familiarise yourself with the content of both this document and the template before you attempt to move your data. Copy & paste your data into the template column by column, worksheet by worksheet.
- All date entries must be 'text' strings in the form "dd/mm/yyyy" (this can be done for you)
- Telephone and mobile numbers must also be text (not numbers or leading zeros are lost).
- Capitalisation will not be altered during import so ensure that names, addresses etc. are already keyed in with the correct capitalisation.
- When uploading Groups data you can optionally specify a leader/convenor membership number. Populating groups with members and additional leader/convenors needs to be done on Beacon after you go live.

3 The Beacon data preparation template

The Excel workbook consists of five worksheets as described below:

Note: similar information can be viewed in the 'cell comments' in the template by hovering your cursor over the red triangles at the top right corner of some cells.

Sheet Name	Contents	Status
u3a_Details	Site parameters and settings	Required
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

3.1 u3a_Details Worksheet (required)

Column A	Comments
u3a name	How your u3a name will be displayed in Beacon (do not include u3a) and do not include a comma. Use of & is OK.
members	Enter "Y" or "N" to show whether you intend to load data.
venues	
groups	
finance	
Financial year starts in	First month of the Finance Year. MM format, e.g. 03 for March
Membership year starts in	First month of the Membership Year. MM format, e.g. 05 for May
Beacon administrator name	Site Administrator's name
Beacon administrator email	Site Administrator's email address
Membership classes in use	Individual, Joint and Associate are present. You can add others
Status values in use	Current, Lapsed, Resigned and Deceased are present. You can add others.
Alias for group (if used)	An alternative description for your groups, e.g. classes.
Alias for leader (if used)	An alternative description for your group leaders, e.g. convenors.
Groups	
Faculties (if used)	List any Faculties referred to in the groups worksheet.
Finance uploads	
Finance/bank account internal names	Current always exists and by default is the account membership fees are paid into. List any additional bank account names in the following rows. If one of these is called Membership that will be setup to receive membership fees. See the Beacon Considerations document for more details. We are NOT looking for sort codes or account numbers.
Names of financial categories	List the names of any financial categories referred to in the finance worksheet.
Custom fields and Polls	
custom fields (if in use)	Poll fields (on which you can select to filter members in Beacon) are preferred to custom fields. Only load these if data is present. To avoid the use of custom fields, consider combining a poll with information in the notes field.
Poll fields (if in use)	
General	
Next mem_no	No need to make an entry here unless you need to leave a gap between the highest member number uploaded from your data and the first new member created on Beacon.

3.2 Members worksheet (required)

[A] indicates further explanation below the table.

Col	Req.	Column header	Type & max length	Comment
A		mem_no	Integer	Member number. Must be unique
B		pmem_no	Integer	Optional partner's member number. Needs identical address as member. Must exist and be unique. The status of both members must be 'Current'. [A]
C		title	Text5	Must be present if gift_aid date present otherwise optional. Mr, Mrs, Miss, Ms, Dr, etc. Only use letters and no full stops or spaces.
D	✓	forename	Text25	Can contain more than one name e.g. Mary Jane. Apostrophes, hyphens and ö, é, è, à are supported. [B]
E	✓	surname	Text25	As forename.
F		initials	Text5	Upper case, A to Z only. No full stops or spaces. If left blank, the first letter of the Forename will be used.
G		suffix	Text5	e.g. MBE, MP. Upper case, A to Z only. No full stops or spaces.
H		familiar_name	Text15	Optional. May be used when a member prefers to be known by a different name, e.g. Bill rather than William.
I	✓	memclass	Text25	Individual, Joint and Associate are provided. Others can be used if entered on the u3a_Details worksheet. Joint members must be paired using Col B pmem_no above.
J	✓	status	Text25	Current, Lapsed, Deceased & Resigned are provided. Others can be used if entered on the u3a_Details worksheet.
K	✓	house	Text25	House number or name. Must not be blank [C]
L		address1	Text30	Can be blank (but usually won't be)
M		address2	Text30	Can be blank
N		address3	Text30	Can be blank
O	✓	town	Text25	Must not be blank
P		county	Text25	Optional so can be blank
Q	✓	postcode	Text10	Must not be blank. (special format)
R		telephone	Text15	Can be blank [D]
S		mobile	Text15	Can be blank [E]
T		email	Text47	Can be blank (special format – needs an @)
U		giftaid_date	Text10	Optional or dd/mm/yyyy [F]

Col	Req.	Column header	Type & max length	Comment
V		emergency	Text255	Emergency contact, e.g. a name and phone number
W		affiliation	Text25	Name of the u3a an Associate member is fully paid up to [G]
X		notes	Text	Optional. If used beware of sensitive information and your Data Protection policy.
Y	✓	joined	Text10	dd/mm/yyyy [H]
Z	✓	renew	Text10	dd/mm/yyyy [I]
AA-AD		<i>custom fields 1-4</i>	<i>Text50</i>	Must be named e.g. custom1-transport and listed in the u3a_Details worksheet [J] Must be in lower case.
AE-AH		<i>Poll fields 1-4</i>	<i>Text1</i>	Must be named e.g. poll1-Committee and listed in the u3a_Details worksheet (may be mixed case, max length 25 characters) May only contain "1" or be blank.

[A] Partner's Number must be filled for pairing members with a "Joint" membership class. It can also be used for members who share the same address with another member – not necessarily a spouse or partner or having "Joint" membership. The result is to combine two members in the TAM list and on address labels so that they share post office mail.

Only 2 members at the same address can be set as sharing an address with each other, although 4 members can be associated in two pairs.

[B] Forename: This field will be used when emails are personalised with a member's forename, so you may prefer to not to store middle names in this field. Middle initials can be recorded in the Initials field, e.g. for Michael John, put Michael in column D and MJ in column F.

[C] Addresses: 'house' is merged with 'address1' on the *Address labels* download when 'house' is no more than 7 characters long. If greater than 7 characters they are shown on separate lines so that the text is not too wide for the label.

You may sometimes wish to add commas in the 'house' field to break up the text as shown in the examples below. 'House' can have at most 25 characters and there are circumstances where this is not enough and words have to be abbreviated or other compromises made.

'House' and 'postcode' (only) are used in Gift Aid reports for HMRC and need to identify the dwelling. Current HMRC guidance states: "As a minimum HMRC will accept the number (or name as appropriate) of their home and their full Postcode".

It pays to be consistent with the way that columns L to O are filled in. This makes searching and filtering easier in Excel 'addresses exports', e.g. when searching for everyone that lives in a specific street or district.

The official address can be checked at <https://www.royalmail.com/find-a-postcode> which will list all the 'house' entries for a postcode. This will help with deciding whether, for example, just "Flat 3" is acceptable or "Flat 3, 10" is preferable (see table below).

Typical examples of suggested house/address combinations are:

house	address1	address2	address3	town
25	Main Road	Carlton		Nottingham
221	5th Avenue	Gedling		Nottingham

Manor Farm		Lambley		Nottingham
The Old Rectory	Church Lane	Colwick		Nottingham
Beacon House, 30	Station Road	Carlton		Nottingham
Flat 3, 10	Mount Pleasant	Gedling		Nottingham
Flat 1, Albany House,	Main Road	Carlton		Nottingham

Refer to the Beacon User Guide, section 4.3.1, for examples of the address labels download, TAM List & Gift Aid submissions generated from these addresses.

[D] Telephone: It is recommended that home phone numbers are in a consistent format. This makes them easier to read and to spot any incorrect numbers that contain the wrong number of digits. The recommended format varies depending on the number of digits in the area code, e.g.

02x xxxx xxxx

For Cardiff, Coventry, London, Portsmouth,

Southampton, Northern Ireland

01xx xxx xxxx For most other major cities

01xxx xxxxx(x) For smaller cities, provincial towns and rural areas

01xxxx xxxx(x) For rural North West England and Borders

[E] Mobile: There is no recognised standard format for mobile numbers. '07xx xxx xxxx' is probably as good as any, or you may wish to use the same format as your home phone numbers.

[F] Gift Aid date: Only applies if your u3a is registered with HMRC to claim Gift Aid. As well as being the date consent was granted, the Gift Aid date is a flag to say the member has consented and cannot be earlier than the member's joining date. Beacon makes claiming Gift Aid easy, but you will need to make a Gift Aid claim from HMRC for the period up to your going live date using your current process. You can only avoid this by migrating Financial Transactions that include Gift Aid qualifying amounts for member fees and donations (Finance column J) but in general this will not be worth the effort.

Note that HMRC do not require Gift Aid declarations to cover a financial year, it can be any period.

For members who have given Gift Aid consent enter the date it applies from.

HMRC require a Title (Mr, Ms etc.) to be included in a claim so complete this as well.

[G] Affiliate: If the Membership class of a member has 'Full member of another u3a' ticked (Associate class) then this attribute is now required on Beacon. We strongly recommend entering the name of the u3a the member is a full member of on the template, even though the data upload process does not enforce this.

[H] Joined: If the joining date is not known, consider using the first day of the current membership year for current members and the first day of the previous membership year for all others.

[I] Renew: For current members this is the first day of the next membership year. For non-current members this is the first day of the membership year in which they should have renewed.

[J] Custom and Polls: Note that custom fields are not used by most u3as due to limitations – discuss your requirement with your Migrator first. 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 of the relevant columns (AB to AI in the members sheet). Custom field name must be lower case.

3.3 venues worksheet (optional)

Col	Req.	Column header	Type & max length	Comment
A	✓	name	Text50	Each Venue Name must be unique. May include letters, numbers, spaces and some special characters, e.g. " – " (not " & ").
B		address	Text50	Not including postcode
C		postcode	Text10	All letters in upper case
D		telephone	Text15	[D] (above)
E		contact	Text50	Name and/or role of a contact person at the venue
F		email	Text47	
G		website	Text50	Note the length limit. You will be able to manually add the URL after your site goes Live. Must start HTTP:// or HTTPS://
H		notes	Text	
I		is_private	Text1	Enter "1" if it is a private address, e.g. a member's house. This will enable the address details to be hidden in certain places in Beacon
J		is_accessible	Text1	Enter "1" if it is an accessible venue.

3.4 groups worksheet (optional)

Col	Req.	Column header	Type & max length	Comment
A	✓	name	Text30	Each Group Name must be unique. May include letters, numbers, spaces, full stops, minus "-" and quotes. Due to a bug useful characters such as braces () and ampersands & cannot be used (see below)
B		faculty	Text30	If present, must exactly match the name of a faculty, as defined on the u3a_Details worksheet.
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

Col	Req.	Column header	Type & max length	Comment
F		info	Text	General information about the group which may be visible to the general public.
G		meets_when	Text50	e.g. 2nd Tuesday at 10:00am, about once a month, regular visits to local theatres, etc.
H		start_time	Text5	Regular start time if applicable in the form HH:MM.
I		end_time	Text5	Regular end time in the form HH:MM. See note [J].
J		max_members	Integer	Use if there is a limit on the size of a group.
K		notes	Text250	Use for adding information that you do not wish to be seen by the general public.
L		contact	Text30	e.g. John on 0123 456 7890. Can be seen by the public, so don't use personal email addresses.
M		join_online	Text1	Enter "1" to allow members to join the group online
N		waiting_list	Text1	Enter "1" to enable a waiting list
O		notify	Text1	Enter "1" for leaders to be informed by email when members join the group or waiting list online.

[A] Group name: Once your data has been loaded onto Beacon your Group names can be edited through the Beacon screens to include characters such as () & and many more.

[J] End time: When viewing a pdf copy of the Calendar, the date and start time are shown together in one column and the end time is shown in a separate column. This has sometimes caused confusion with members reading the end time as the start time and turning up late for meetings. So consider carefully whether you really need to specify the end time.

3.5 finance worksheet (optional)

Note: very few u3as upload Finance information at migration. One reason is the import process has limitations such as not supporting transfers. Most that use the Finance capabilities of Beacon do so at the start of a subsequent financial year.

Col	Req.	Col. header	Type & max length	Comment
A	✓	t_date	Text10	dd/mm/yyyy transaction date. Must not be in the future
B	✓	account	Text15	Must match the name of an account as defined in the u3a_Details worksheet.

Col	Req.	Col. header	Type & max length	Comment
C	✓	amount	Decimal	No symbol, use negative values for debits
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	As a shortcut 1 = membership, 2 = donation Other categories must be defined in the u3a_Details worksheet and their name entered as full text.
F	✓	payee	Text30	The payee or the payer.
G		cheque	Text10	The cheque number, if applicable.
H		details	Text50	Additional information about the transaction.
I		mem_no	Integer	Member's Number if the transaction is associated with a member who exists in the members worksheet.
J		giftaid	Decimal	Amount of this transaction that qualifies for Gift Aid. Mem_no must be present. [F (above)]
K		claimed	Text10	dd/mm/yyyy The date when Gift Aid claimed. Must not be in the future. Leave blank if Gift Aid has not been claimed on the transaction.

Appendix – Tips for preparing and checking your data

Password Protection

When emailing files that contain members' personal data, the Workbook (not the individual worksheet) must first be password protected. This varies with the software you are using and versions of Excel.

1. Select File > Protect Workbook > Encrypt with password OR for recent version of Excel File > Save As > Tools (on the bottom right) > General Options...
2. Type in a password
3. Type in the password a second time to confirm and click OK.

Send the password-protected file and notification of the password in a separate email.

Note: you may wish to keep a copy of the file without password protection just in case you forget the password and can't open the file!

Splitting addresses

The Migration Team have tool they can use to do this for you with minimal work.

To have a go yourself this is a suggested approach.

If a members house number and street is currently contained in the same cell in Excel, here is one method that you can use to split the data up into 'house' and 'address' as required in the template file:

1. Copy your data into a blank worksheet. It is assumed the house/street information will be in column A, but the method will work equally well with it in other columns.
2. Insert (say) 3 blank columns to the right of column A.
3. Highlight column A and do a 'Find & Replace' (Ctrl + H) to replace all the blank spaces with commas.
4. Select 'Data > Text to columns'. At the first step of the resulting wizard make sure that 'Delimited' is selected. At the 2nd step tick 'comma' only and click 'Finish' to separate component parts of the addresses into separate columns.

Addresses such as "22 Station Road" will have been separated into 3 columns. You can stitch 'Station' and 'Road' back together as follows:

1. In cell D1 enter the formula: =CONCATENATE(B1," ",C1)
2. Copy cell D1 downwards to the bottom of the list
3. Highlight column D and copy it (Ctrl +C)
4. Right click anywhere in Column D and select 'Paste Special' from the sub-menu.
5. On the next screen select 'values', followed by OK.
6. Delete columns B & C.

Checking data in the members' worksheet

Column Filters

Put a filter on the whole table by highlighting the first row and selecting **Data > Filter**. You can do the following checks by clicking the arrows in the column headings. Any blank rows can be found by unticking 'select all' and ticking '(blanks)' at the bottom of the list. Any other unusual entries should be easy to spot at the top or bottom of the filter.

These checks can be done on any column, but particularly:

- mem_num (A)
- Memclass (J)
- Status (K)
- Town (P)
- Post Code columns

Version	Date	By	Changes
v6	July 2018	Graeme Bunting	u3a_Details worksheet Extended guidance
v7	July 2019	Graham Tigg	Guidance wording changed to reflect new Beacon Team processes Include more info on Gift Aid implications
v8	July 2019	Graeme Bunting Graham Tigg	Improved house/address guidance and Gift Aid wording.
v9	July 2019		Combined v7 and v8
v10	Oct 2019	Graham Tigg	Changed Finance account suggestions (set up a Membership account) Changed name from BDM
v11	Nov 2019	Graham Tigg	Clarified custom fields must be in lower case
v12	Jan 2020	Graham Tigg	Emphasised that Joint members need to be paired
v13	Jun 2021	Graham Tigg	More detail on characters acceptable in Group names Added words on approach and potential role of the Supporter. u3a name not to use comma (makes sending system emails potentially unreliable)
v14	Nov 2022	Graham Tigg	Stated poll name can be up to 25 characters
v15	Sep 2023	Graham Tigg	Affiliation to be completed if membership class is 'Associate'
v16	Sep 2023	Graham Tigg	Title to be completed if Gift Aid date present
V17	Dec 2023	Graham Tigg	Clarified Financial categories
V19	Jun 2024	Graham Tigg	Removed 'sex' field