GMS 6 User Manual

User's Guide

10/20/2011

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Customer and Technical Support

When you need help using GMS, contact us by e-mail or telephone. Our live support is available during daytime business hours, Eastern Time. We also offer training at your location or via the web.

E-mail	support@bespoke.com
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Mail	Bespoke Software, Inc. 5 Sand Creek Road Albany, NY 12205 USA
Website	http://www.bespoke.com

Welcome to GMS 6

GMS 6 is a powerful tool that makes it easy to organize your Athletes and Coaches. GMS tracks Athletes, coaches and other individuals information, tracks certification, manages competitions, athletes medicals and consents and provides over one hundred and fifty reports.

GMS includes customizable data fields and filters that give you complete control over how you define and use your organization's data.

Version Notes GMS 6

Highlights of what's new in GMS 6

General

- Links to context-sensitive help now enabled. Press the **F1** key at any screen to bring up help for using that screen/tool.
- Revamp of the user interface on the main GMS 6 and Profile Editor screens.
- Most combo boxes support incremental lookup by typing into that editor.
- In the attached comments tool, added support for importing images from PDF files.
- The groups setup tool now supports deleting and merging of multiple groups at once.

System Preferences

- Set personalized title bar text (the top bar which usually says just "GMS 6").
- Shared addresses can optionally not also share phone numbers and e-mail addresses.
- Add your own logo in the lower-left corner of the main GMS screen.

Profile Editor and Person Lookup

- Major overhaul in the look of the Profile Editor!
- Popup hints for people now include the person's photo an job associations.
- Entrant photos can now be extracted from PDF and loaded from PNG files.
- Added the ability to send letters directly from within a person's profile.
- In the person lookup tool, you can now drag & drop files directly onto a person to add them as attachments to that person.
- When copying someone's name and address to the clipboard, now also includes the company name for the person (if present).
- Changes to a person's Date started, Inactive date an Date active are now tracked as transitions.
-

Communication

- Basic mailing labels now default to excluding people marked as "Do not mail".

Training

- Added the new training statuses "Excused" and "Incomplete".
- Training records now have the property WAITLIST POSITION.
- Training courses now support multiple instructors, these instructors appear as students with the status of "Instructor".
- Only the registrant statuses Complete, Registered, Pending, Failed, Unconfirmed, Waitlist, Incomplete now count against a course's enrollment when calculating how many people are in the course.
- Added a new training course properties Anonymous enrollment for when you know a group is coming, but the specifics are still unknown, STATUS of the course itself (confirmed, cancelled, proposed, etc.) and COMMENTS.
- Automated training reminders can now be generated.

Reports

- New built-in custom column report - Anniversary Month Report - list Individuals with a service anniversary in a given month.
- New report - People Emergency Info - This produces a report with contact, medical alerts and emergency contact information.
- New Summary/crosstab report - Hours Summary for period by Individual.
- New report - Directory Listings - produces an RTF file that you can edit to produce a contact directory.
- Reports can now be printed from List Manager.
- Added a people filters on "Inactive reason".
- On the report selection tool, mouse hover brings up a hint window with details of the report.
- Added support for command-line reports and exports to be run from a specifications based on a file with the report's settings.

- Fiscal years are now displayed as "FY10-11" rather than "FY2010" to avoid ambiguity as to which year (start or end) is used.

Security

- Security setup now adds the option to prevent non-owned reports from being loaded and/or saved.
- When security is enabled, if the security user (as a person) has a photo, that photo will be shown in the upper-left corner of the screen. If not, and the user is a superuser, then the "secret agent" icon is shown.
- Access to the Report Designer is now a security right. For backwards compatibility, all users by default have access.

Bulk Value Updater

- Bulk Value Updater can now use combo and checklist fields as well as read-only fields as the sources for string or memo fields.
- Awards can now be updated using the Bulk Value Updater tool.
- Credential printing tool now supports filtering on the person's last name.
- The credentials tool now supports adding additional filter criteria as well as setting a count of records to be retrieved.

How to Use This Manual

The main body of the *GMS 6 User Manua*l is presented as step-by-step instructions on how to use the different tools and features. The manual also includes a *Glossary of Terms and Fields* and a section on *Shortcuts for Using GMS 6* (page 253).

This manual can be downloaded as a PDF from the Bespoke website - http://www.bespoke.com or can be accessed electronically at http://www.bespoke.com/GMS-6-.

On any screen you can also click the Help link or hit the F1 key, to bring up the appropriate section of the manual electronically.

Tools and Features

The manual includes sections on the major menu divisions of GMS, including certifications, reports. Some other of the manual sections are more oriented on a group of tasks that may cross several menus, including working with people.

In these sections you will find an explanations on the tools or task at the start of the section. This usually be followed by a screenshot of the part of the program you will use, followed by step by step instruction. There will be a listing of the tools (menu options) on the left margin with explanations of what they do, and a listing of the FIELDS on the screen that you might need to fill out or choose an option to complete.

- THINGS IN THIS FONT ARE NAMES OF FIELDS - PLACES IN THE WINDOW WHERE YOU WILL NEED TO MAKE A CHOICE OR FILL IN INFORMATION.
- Things in this font are menu choices or links - things that you click on to proceed.

And a note on gender. We have mixed and matched the use of "he" and "she" throughout the manual, trying simply to be consistent within a section.

Glossary of Terms and Fields

Be sure to refer to the *Glossary of Terms and Fields* to learn how the fields in GMS behave, what type of data are expected in them, how and when to use the field, and other essential information about special GMS terminology.

Tip: For organizations that are delivering portions of this manual to users, be sure to include the glossary.

Shortcuts for Using GMS 6

Toward the end of this manual, you will find a section called *Shortcuts, Tips and Tricks in GMS 6* (page 253), which contains tips for working most efficiently in GMS. Look in this section when you are ready to learn keyboard shortcuts (which can be faster than using a mouse click to access a menu or selection list), hints on mouse action in certain fields, and an explanation of how certain parts of GMS function behind the scenes.

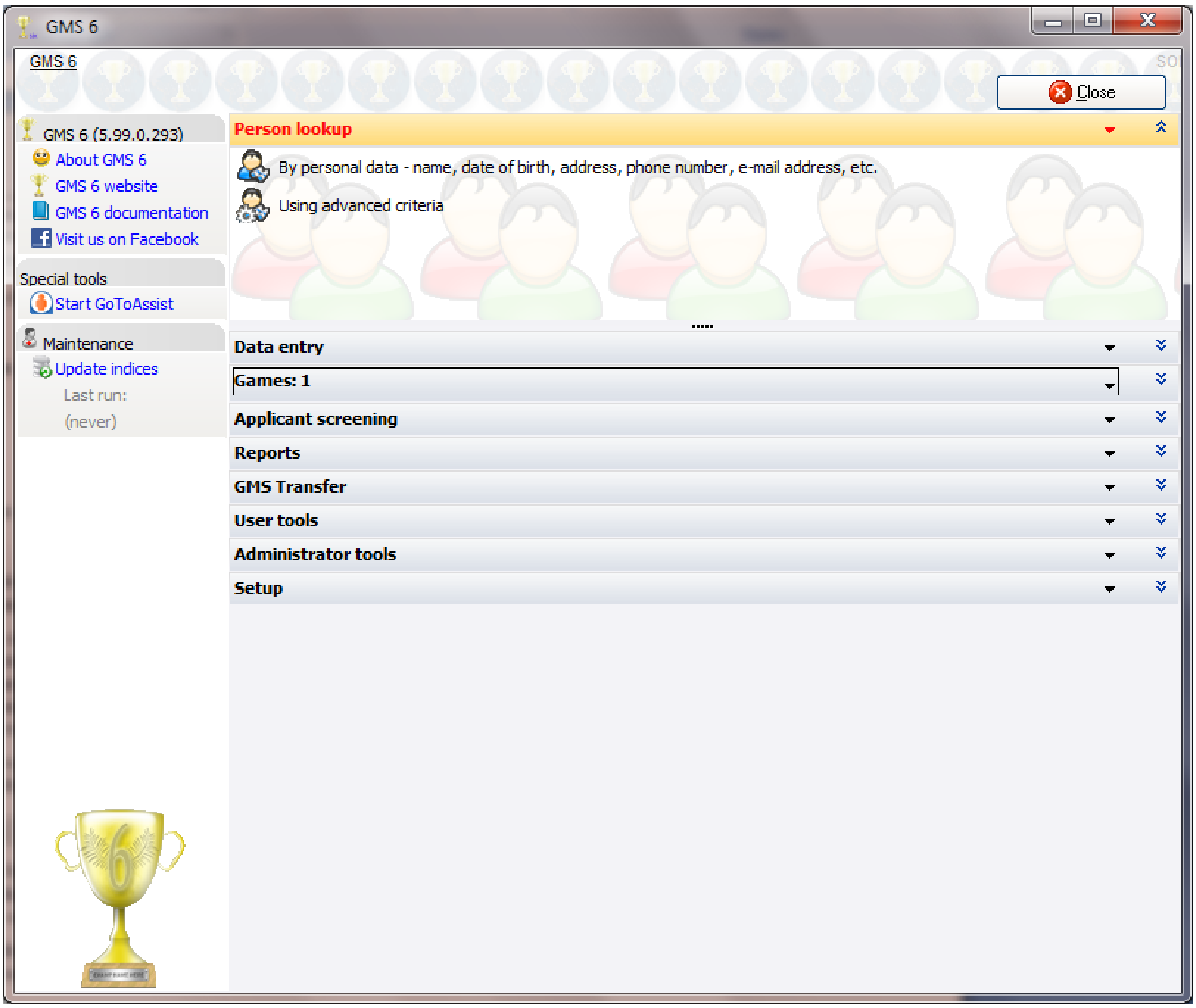
What GMS Looks Like: Conventions and Getting Around

GMS has a consistent look and feel, which makes it easy to get around. As you begin to use GMS, you will discover that no matter where you are in the system, your next task is no more than a few mouse clicks away. In addition, GMS never forces you to work through a long, complicated process from start to finish without stopping. Most processes are easily separated into short tasks that you can start, stop and save at any time without losing any of your progress or having to back out through a long path. This lets you enter as much information as possible, save your changes, and then go back into it again at any time.

To get started, double-click the GMS 6 icon on your computer desktop.

If your installation contains multiple databases, then when you first open GMS, it prompts you to select a database to open. Depending on how your system security is set up, GMS may also prompt you to log in with an authorized username and password that is provided by your system or network administrator.

On the main GMS 6 window, you will see the following on the left navigation panel:



GMS 6 section Links to the Bespoke website for more support for GMS 6.

Special Tools This includes links to change languages, look at a snapshot of your statistics, start a GoToAssist session with support, and your license information.

Maintenance Maintenance reminders.

In the center of the screen you will see panels that open by clicking on the bar with the name of the panel. Currently the Person lookup panel is open and you can see the options in the panel for searching for people.

You will also see a link path (aka - breadcrumbs) in the upper left portion of the window that shows where you are within GMS. With each new screen you open, GMS helps you keep track of where you are by showing you the name of the current screen and relevant information about where it is located within the system. When you are viewing or entering personal data about an individual, this link path will even display the name of the person whose data you are viewing. To return to the main screen or another screen in the path, just click the desired screen name.

In the figure above, the only link shown is the GMS 6 main screen, because that’s the screen we’re currently on and there are no screens before it.

Using Panels

Most tasks begin by opening a panel, and then clicking a link on the open panel. The task panels on the right are drop-down panels that are either open or closed. When a panel is closed, you only see the title bar of the panel. To open the panel, click the title. To close a panel, click the title again.

In some places, like the Profile Editor, GMS hides entire panels (e.g. Relationships) if they have no content yet. You'll still see the link for the panel on the left, and clicking on that link will prompt you to add an item to that panel. Then the panel will be displayed.

Moving Around Within GMS 6

Screen to Screen

Clicking on some links brings you to a new screen. The **Back**, **Save** and **Cancel** buttons take you back one screen. Whenever there's information on the current screen that needs to be saved, you'll see the **Save** and **Cancel** buttons. Clicking **Cancel** takes you back without saving the currently open changes, **Save** saves those changes before taking you back.

Along the top you'll see underlined links, called "breadcrumbs". You can click on any of these links to go back to the corresponding screen in GMS 6.

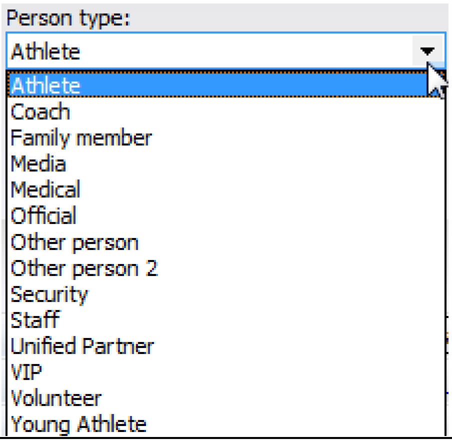
Field to Field

On a panel or screen containing fields, press the **Tab** key to move from one field to the next, or, alternatively, use the mouse to click within a field.

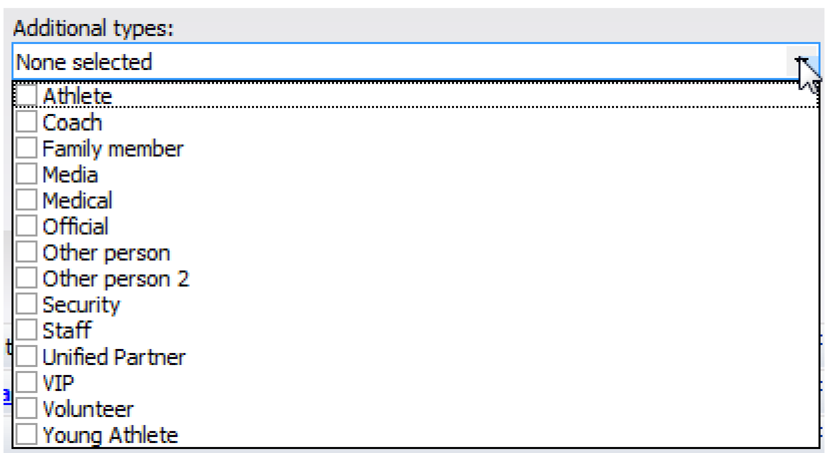
Editors/Controls

Using Drop-Down Lists

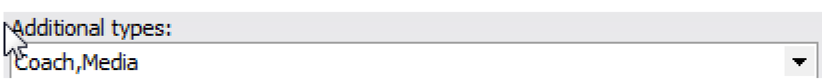
Some fields are drop-down lists from which you can select a single value. Click on the down-arrow to the right of the field. A drop-down list opens. Click on the selection you want.



Checklists are another type of drop-down list. A checklist contains multiple choices and allows you to make multiple selections. Click on the down-arrow to open the list, and click in the check box to check as many items necessary. To uncheck an item, click in the check box again.



To close a drop-down list, click in the field or anywhere off of the list.



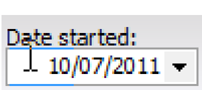
For some of these checklists/drop-down lists - those for jobs and accounts - right-clicking on the list brings up two additional options: SHOW FLAT and SHOW BY ACCOUNT NUMBER. These re-organize the items on the list to make it easier to find the options you're looking for.

Tip: For many of these checklists, you can right-click on the checklist to get a popup menu with the items All, None and Reverse. Clicking on these checks all, un-checks all, or reverses the checks for all of the items in one quick operation.

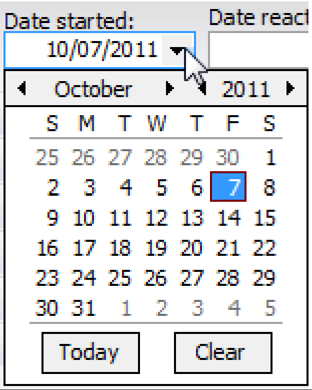
Entering Dates

You can enter a date in a date field by either typing in the date or by selecting the date from a drop-down calendar.

For example, **100711** *will be converted to* **10/01/2011**, as shown below.



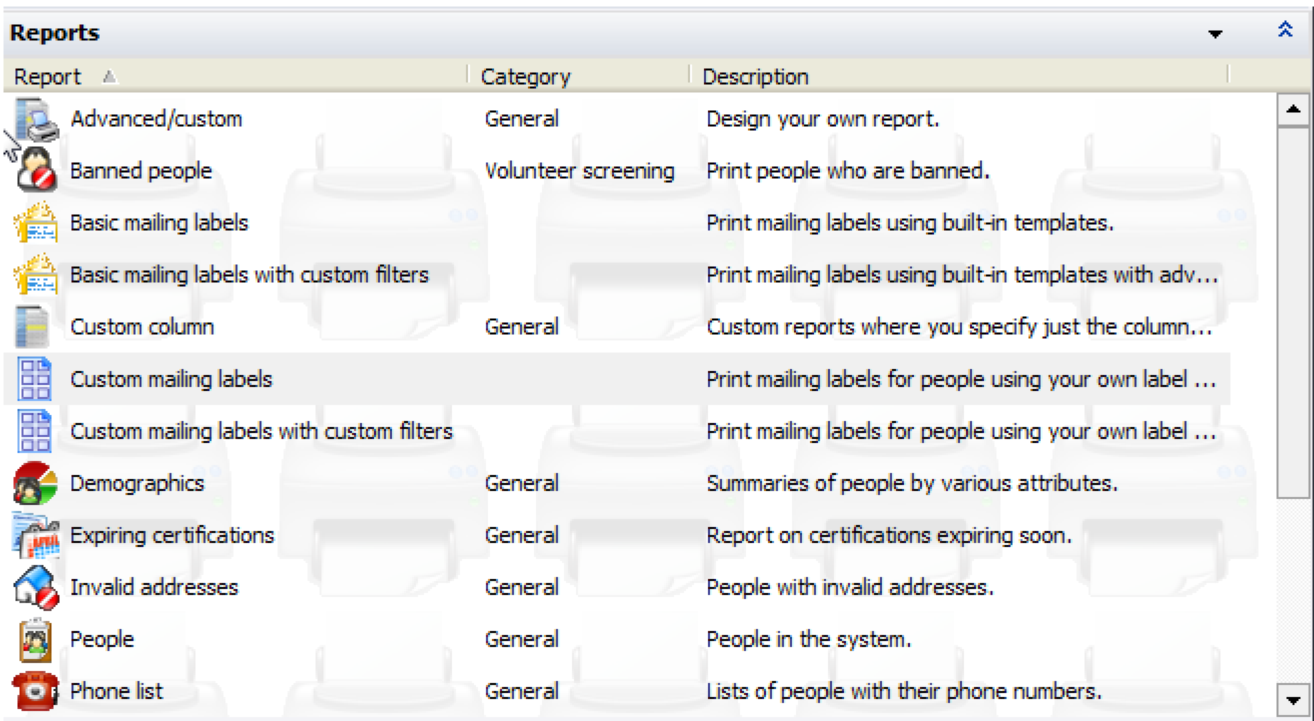
For a calendar view, click the down-arrow.



In addition to dates typed in as above, GMS also supports relative dates, i.e. those which don't have specific values but are always some distance from the current date. See *Relative Dates* (page 281) in the appendix for more information.

Viewing and Using Tables

In various places in GMS, you'll find panels and screens that display data in a table format of columns and rows, as shown on the list of Reports below.



Here are some things you can do with these tables:

- *Change column width* – Sometimes a column may be too narrow for you to see all the information. If you see "..." at the end of a field, that means that GMS isn't showing the end portions. You can make each column wider or narrower as needed by clicking the divider bar in the column heading and dragging it to the right or left.

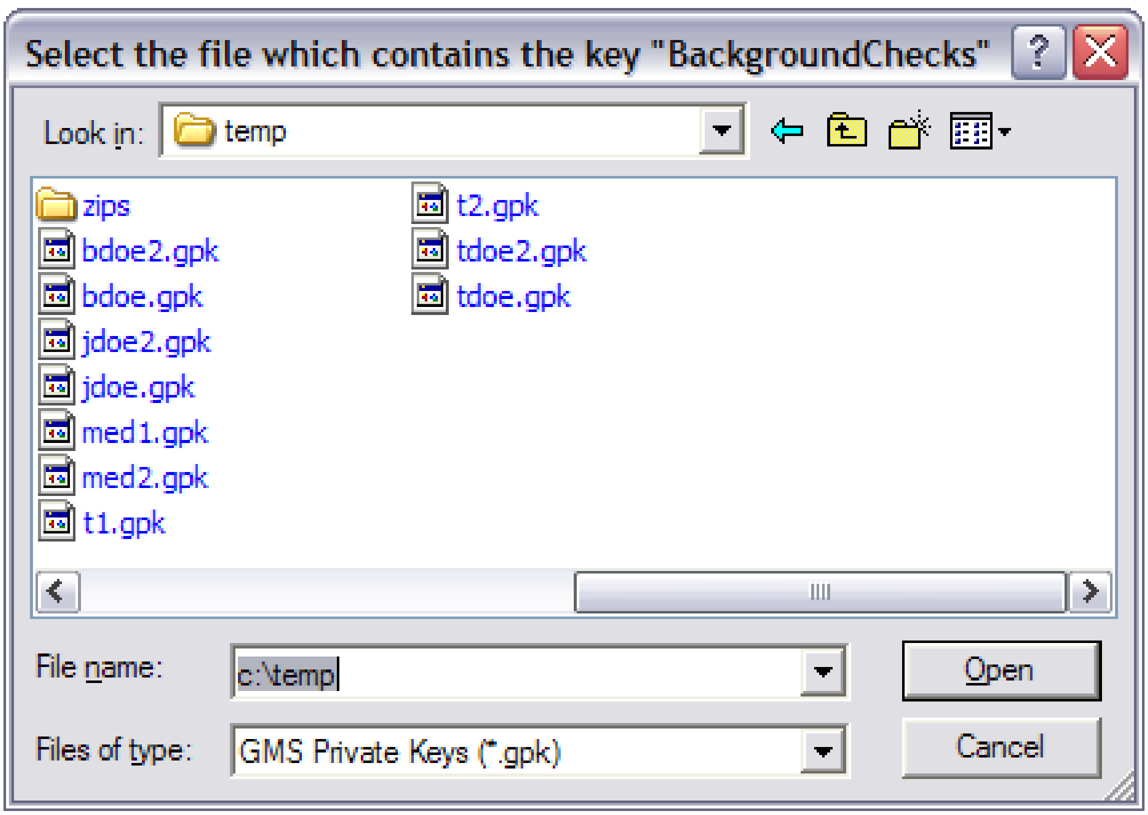
"Clicking and dragging" means that you click on the little column divider bar, and keep holding down the mouse button while sliding the mouse in the desired direction.

- *Sort data* – In most tables, you can sort the rows of data according to any of the criteria given in the column headings by clicking on the corresponding column heading. In the picture shown above, the table is sorted by LETTER in ascending order. To switch that sort order to descending order, click on the LETTER heading again. You can also sort the data by any of the other columns in alphabetic or numeric ascending or descending order by clicking on that column.
- *Scroll bars* – When a data table is longer or wider than the panel or screen size, you will see scroll bars on the right and/or bottom to help you access the data you can't see. Use the scroll bar to move up and down or side to side to view the data.
- *Digging deeper into the data and options* – Clicking on an item usually opens it for more details. Right-clicking on it with your mouse usually brings up a menu that's specific to that item with more options for working with an item. Right-clicking on empty space in a table usually brings up items you can do with the entire table, usually including creating a new item.

GMS Encryption

Providing Keys within GMS

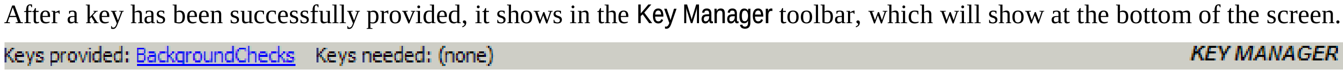
When GMS tries to access data in an ***encrypted*** (page) certification, it prompts you for a decryption key for that type of certification. Once a key is requested, the Key Manager toolbar opens on the bottom of the screen, showing the keys that have been provided, and those needed but not provided.



If you give GMS a user decryption key, you will also need to provide the passphrase.

If you get the error "Unable to load key: Invalid RSA Key," you have either entered an invalid passphrase or the key has been revoked.

After a key has been successfully provided, it shows in the Key Manager toolbar, which will show at the bottom of the screen.



If you are unable to provide the key, or hit the **Esc** key when prompted for the file, the toolbar will show the Key Manager with that key as *needed*.

To protect encrypted data and prevent others from accessing the data when you walk away from your computer:

1. Click on a key name next to Keys provided to release the key and prevent it from decrypting any more data.
2. Remove the USB flash drive containing the key.
   GMS will forget that it has that key and will be unable to decrypt any new data.
3. To re-enable your access to encrypted data, click on a key name next to Keys needed.
   GMS prompts you for the key so that you can access the encrypted data.

See ***Encryption Key Manager*** (page) on the Administrator panel for more specifics.

User Roles and Responsibilities

Administrator

Your organization needs to have a person designated as the GMS administrator. This person will set up and manage the following tasks in GMS:

- define custom fields and design custom application forms
- manage data backups and perform index rebuilds
- establish settings and customizations for your organization
- perform data and report set up tasks
- establish default values for fields
- set up date, time, and phone formatting
- set various appearance settings
- configure encryption for certain sensitive data

The Administrator tools and Setup panels in GMS are where most of these special tasks are clustered.

Data Entry

Data entry users are responsible for manually entering all of the information about Individuals, such as the following:

- personal information
- photo ID
- skills, needs, preferences
- alerts
- availability
- certifications
- training
- background check requests

These users will also:

- enter information via custom application forms
- update phone numbers and addresses for existing people
- run mail merges
- enter Individual hours
- mark bad phone numbers/e-mail addresses
- print name tags, badges and credentials
- add people to/remove people from lists

This is the only person who will normally use the background check decryption key, and is, therefore, able to access encrypted background check data.

People

People are Persistent

What we mean by this is that you enter the person into GMS once, and then tie that person to all kinds of events, jobs, and other properties in the system without ever having to input their information again or without having to back out of your current process to make changes to the person's information. You can view and update their details from anywhere in the system where you refer to the person, such as within a Games and job assignment, lookup/search, as well as in the data entry panels. The Profile is everywhere. Once a person is entered into GMS, that person takes on more attributes and a deeper history as their situation or relationship to the organization grows over time. This data persistence helps you to tap into potential Individual resources that might otherwise be forgotten.

It also means that any changes made to a person in one place affect that person everywhere: change "Jim Doe" to "James Doe" from within a Games, and his name is changed everywhere in GMS all at once.

Finding People by their Personal Data

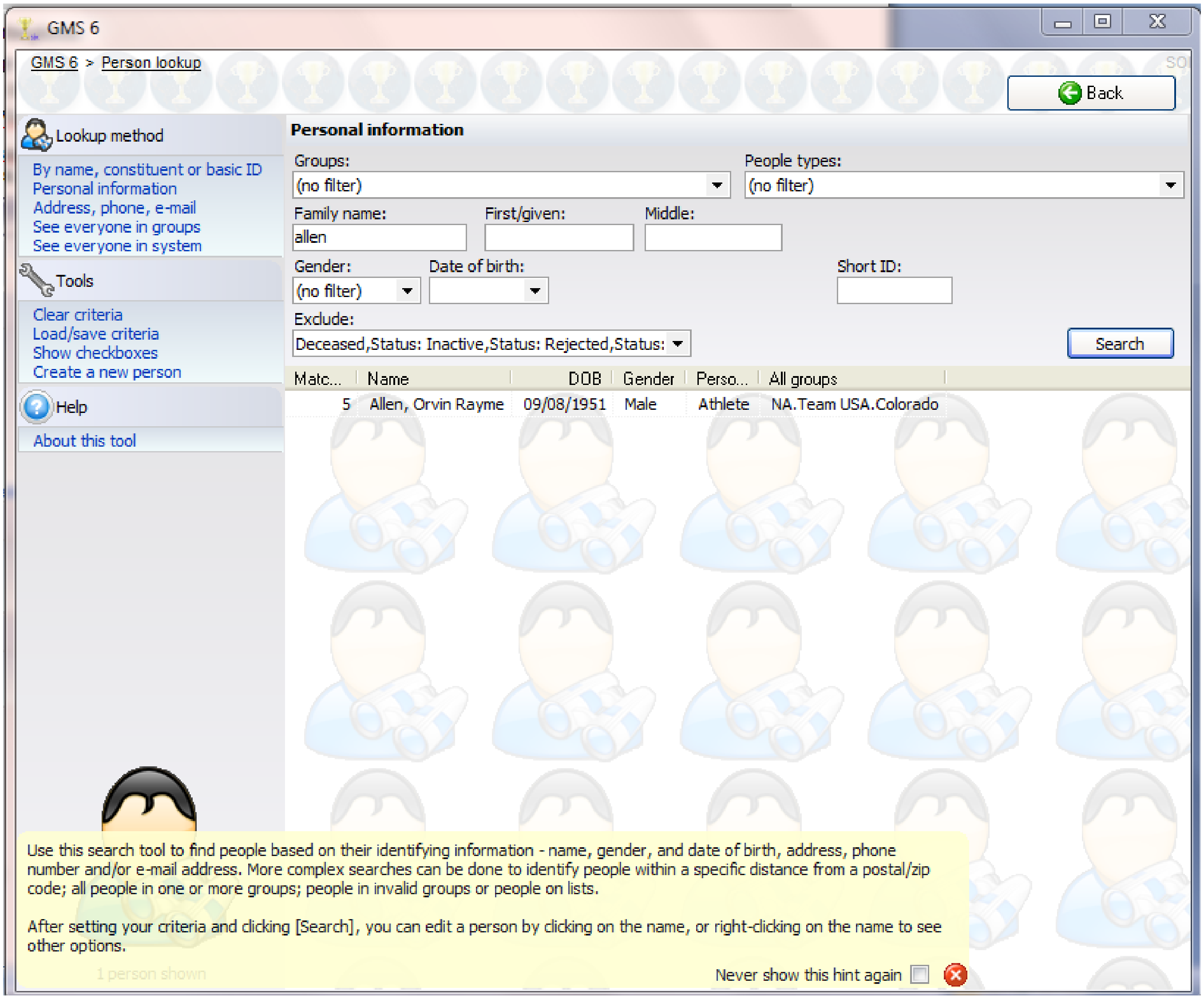
You can search for people in GMS using many different criteria:

- ***Personal information*** (page 11)
- ***Address, phone and e-mail*** (page 14)
- ***Distance from a postal code*** (page 15)
- ***Other searches*** (page 15)
- ***Using advanced criteria*** (page 35)

By Personal Information

Let's begin by entering the family name.

Go to the **Person lookup** panel, and click on **By personal data – name, date of birth, address, phone number, e-mail address, etc.**



Under FAMILY NAME, type in the family name "allen" then click on the **Search** button or hit the **Enter** key. GMS brings up all of the people who have a family name that matches, begins with or sounds like "Allen". Since we found the record we're looking for, we can simply click on the name, and be taken directly into the record and view or modify the person. If more people appeared in the results, we could sort them in a variety of ways in order to narrow down our options. Clicking on any of the heading tabs (for example, NAME, DOB, SEX, TYPE, or GROUP) will sort the records by that field.

You don't have to enter the person's complete last name to search. By entering just the first few characters, GMS will find all of the people whose name begins with what you entered. This is especially useful if you're not sure how the name is spelled.

Other criteria

Entering a DATE OF BIRTH brings up all people who were born on that date, regardless of the name criteria you enter. People who match both the name and date of birth criteria will sort towards the top of the list. Including a COMPANY finds people who are employees of a company that begins with the values you enter (not a relationship search, this uses the COMPANY field in the Profile Editor). Including a team name brings up teams with that name, and selecting a gender will only show those people who have that gender, or who have none recorded.

Use the EXCLUDE filter to show inactive, archived, deceased or placeholder people. They are excluded by default. The SHORT ID/MEMBERSHIP ID is a person's five-character alphanumeric ID which is assigned by GMS or the ID code of their memberships. The SHORT ID is not necessarily unique, but it is close, and makes a great way of finding people quickly. (You can see a person's SHORT ID on the top of their Personal data panel in the Individual profile.)

On the right-click menu

Once a search has been completed and at least one person comes up as a result, you can right-click on an individual person to bring up a list of tools.

Edit	Opens the Individual profile.
Update addresses and phones	Opens the simplified Profile Editor (name and addresses only). This is much faster to open than the Individual profile.
Open read-only	Opens the Individual profile for this person, but in read-only mode where no changes can be made.
Create new	Creates a brand-new person from scratch.
Delete this person from the system	Permanently and completely deletes this person from GMS. This removes the person from all Games, deletes all assignments, custom fields, applications, certifications, addresses, etc. and cannot be un-done once completed. Not recommended.
Comments and images for this person	Associates any number of pictures and comments with this person.
Attachments	GMS allows you to attach files to a person, for example their scanned application or a Word file containing a reference from an employer. Use this to add, edit, delete and work with these attachments.
See tracked changes	Shows all changes made to this person when and by whom. Only available if tracing is enabled.
De-duplicate (merge) with another person	If you have the same person in GMS more than once, use this tool to combine the selected person either with somebody else on this list, or to search for the person to combine with.
Print a report for this person	Shows a list of the built-in or saved ***reports based on people*** (page 90). Prints that report just for the current person.
Copy name and address to the clipboard	Copies this person's name and address to the clipboard for you to paste into another application.
Show checkboxes	Click this to show a checkbox next to each person on the list.
Show columns	Add or remove visible columns from this list, e.g. you can show each person's e-mail address and Individual type as columns to this list.
Select	All, None, Reverse
Selected people	

Print mailing labels	Prints ***mailing labels*** (page 73) of any type for just these selected people.
Print a report	Shows a list of the built-in or saved reports. Print that report just for the selected people.
Print credentials	Brings up a list of ***credential/name tag*** (page 168) layouts that you've saved to let you print one for each of the selected people.
Add entrants to list	Displays a list of all standard lists. Selecting one will add the checked people to that list if they're not already on it.
Remove entrants from list	Displays a list of all standard lists. Selecting one will remove the checked people from that list, if present.

Add "person name" to list	Adds this person to the list you choose. You can even make temporary lists here and use them to print reports or work with the list of selected people.
Remove from list	Removes this person from the list you choose. Not visible if the person is not on any lists.

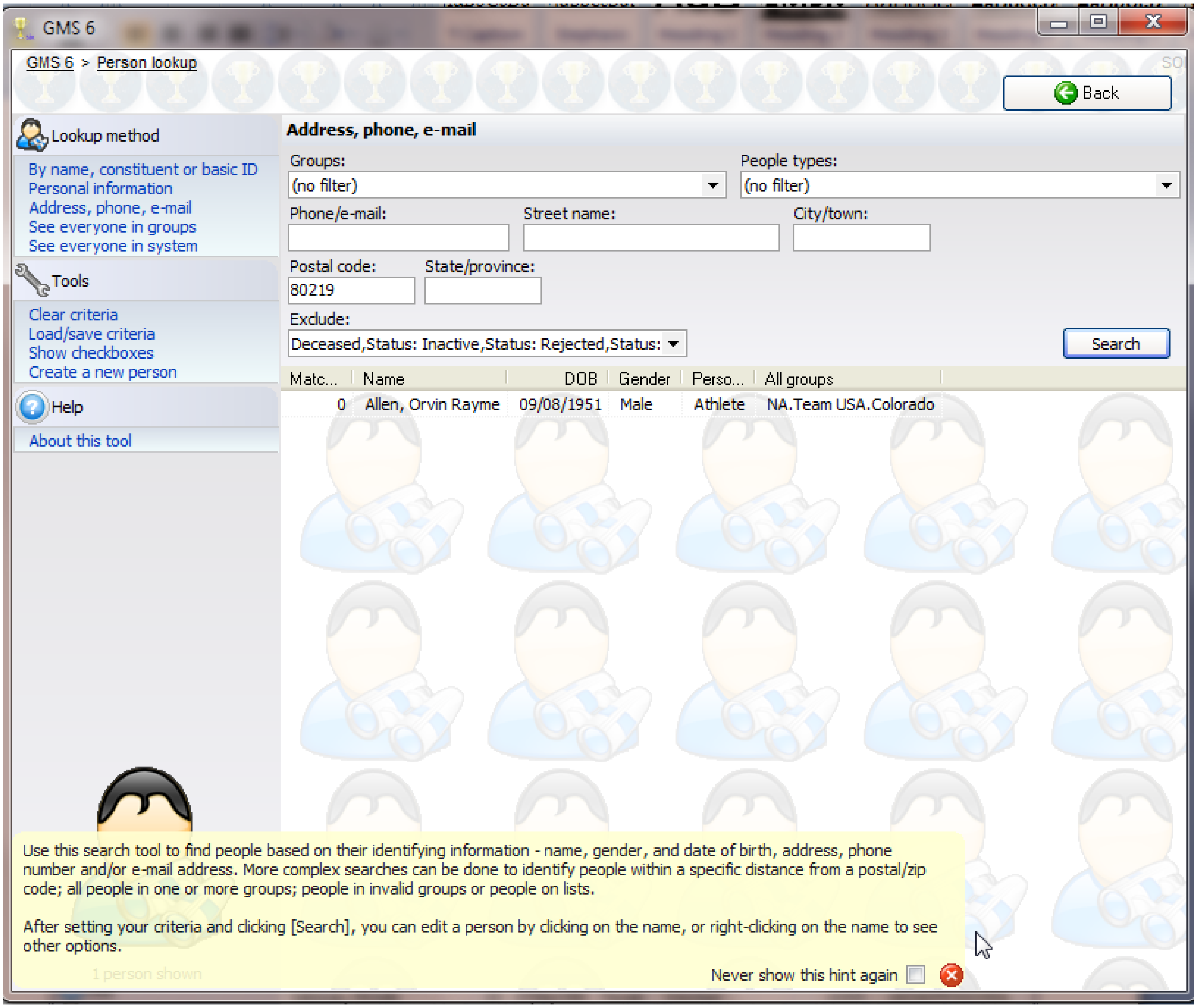
GMS only allows one user at a time to edit an individual person. If two users try to edit the same person, the second will see a warning message and will open the person in read-only mode.

Address, phone, e-mail

We can search for people by address, phone, or e-mail by clicking on the **Address, phone, e-mail** link on the left of the screen.

- Entering a phone number or e-mail address will find people who have a phone number or e-mail address beginning with the text you enter. You'll need to type in at least four characters for the search to work.
- Putting in a POSTAL CODE (zip code in the US) brings up all people with an address in that postal code.
- STATE/PROVINCE, combined optionally with CITY/TOWN will bring up all people in that state, optionally only those in the given city in that state. Note that CITY/TOWN cannot be used by itself - STATE/PROVINCE must be entered if CITY/TOWN is included.
- STREET NAME brings up all people with that street name. STATE/PROVINCE must be entered with STREET NAME.

A person will be shown if he meets one or more of these criteria.



Some of these searches require that the address table be updated to a more recent format. Make sure that you run the Index Rebuild (page 193) tool once per week (or more often if your data is also updated by GMS) to ensure that these lookups work as expected.

Other Lookup Methods

By name, or basic ID lets you type in any of these values and finds the associated people. You can enter a phone number or e-mail address, too, and GMS will find the people who have that value associated with them.

See everyone in groups displays all people in the groups that you choose, filtered only by their person type, status and team.

See everyone in system displays all people, filtered only by their person type, status and team.

People on lists lists people who are on any of the lists that you select. This option is not available if no lists have been set up in your data.

Filters

By default, GMS 6 finds people in all groups. By checking one or more items under GROUPS, GMS will only return people who have those groups as their primary or additional groups. This will come in handy when you know the group the individual belongs to, or have fragments of their information (partial last name, incomplete address, etc).

TYPES OF PEOPLE is set to look through all types of people. If you know a person's type, select that type here. Only people who have that as their primary or additional type will show.

Selecting a GENDER will limit the results to people with either the given gender, or whose gender is "Unknown".

The EXCLUDE filter lets you remove people who are archived, deceased, inactive, placeholder, or by their active status (active, applicant, inactive, leave of absence, prospect, rejected, special, terminated). Check one or more options on this checklist to filter people based on these attributes. Note: if you check off all of the active status options, GMS will do no filtering on active status.

On the left side of the screen, after doing a search, GMS will indicate if the filters on *deceased*, *active status*, *archived*, excluded any people from being displayed.

Remembering Searches

If you have common searches that you run regularly, GMS lets you save the criteria (rules) of those searches for later use. Near the top, click on Load/save criteria, then on Settings. Click on Save, then name the search and click **OK** to save the current criteria. Use Load to re-load criteria that you've saved in the past.

If GMS security is enabled, meaning you log into GMS when you first start it up, GMS will remember your criteria separately from those of other users. You won't see the values saved by other people, and they won't see yours.

Create a New Person

Concepts

A person must be entered into GMS before they can be included in a mailing or included in your Individual pool for future assignments.

If a person is already in GMS, do not create him again as a new person. If a person is created multiple times, GMS will treat each one as a different person. It will become very difficult for you to maintain the person's information accurately and see his history with your organization. If you do find that a person has been created more than once see *Combining Duplicate People* (page 36).

A new person can be added to GMS in three common ways:

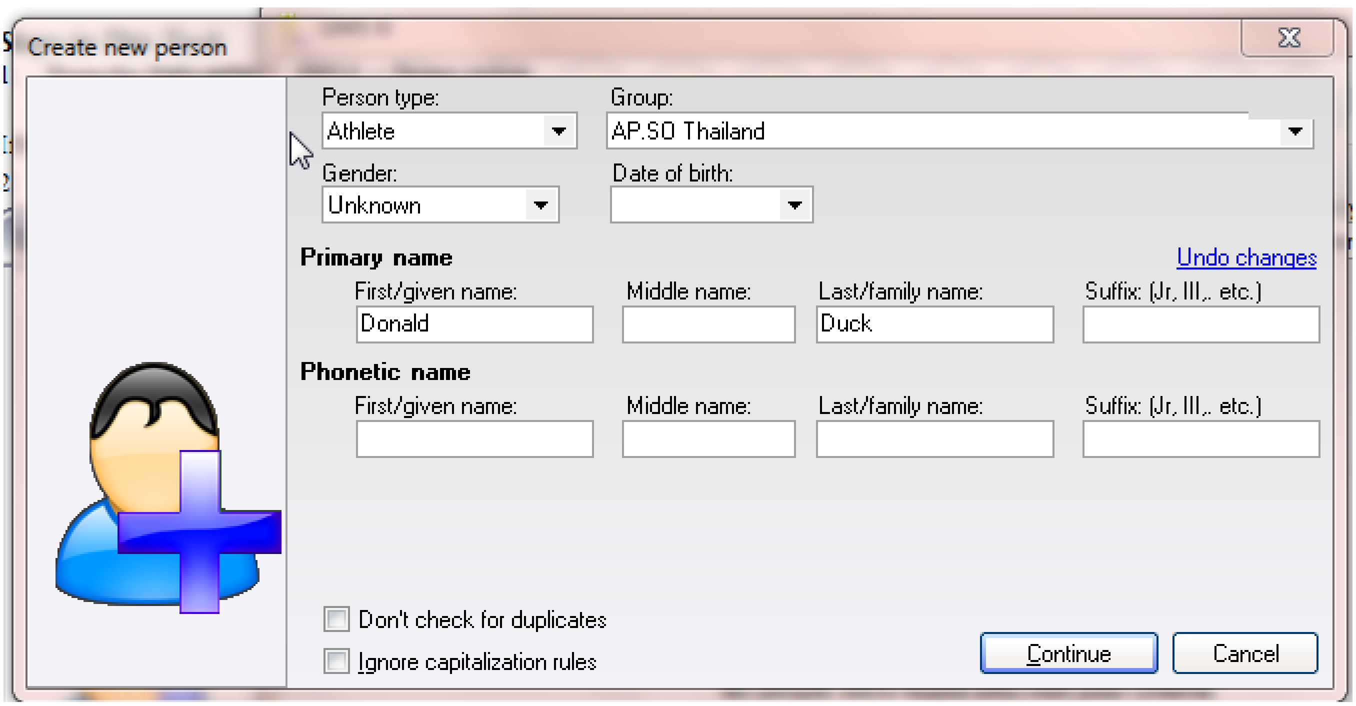
- If you are registering people to work on a specific Games, the Registration Wizard from within a Games lets you create a new person while also registering that person in the Games.
- From the person lookup tool, click the Create a new person link in the left navigation panel. (This method is described here.)
- You can use a custom application form set up by your organization to add a new person to GMS. Any custom application forms you may have developed are accessed from the Custom Application Forms panel.

Steps in This Task

1. From the Data entry panel, click By personal data - name, date of birth... The Person Lookup screen opens and shows the lookup criteria fields.

If the person you want to create is not already in GMS, then follow the steps below to create a new person.

2. In the left navigation panel under Tools, click Create a new person. The Create new person window opens.



3. Enter the person type, group and the primary first/given and last names. They are required fields.

Field Name	Definitions and Comments
NEW PERSON TYPE	The primary type of person, such as athlete, coach, etc. (required)
GROUP	The primary organization this person is associated with. (required)
	Note that the person must be assigned to a group, even if you have to assign him to a general group for now and later change them to a specific group when the information

is available.

GENDER	Enter this to help GMS look through existing people to ensure that you're not creating a duplicate person.
DATE OF BIRTH	(see GENDER above)
PRIMARY FIRST/GIVEN NAME	(required)
PRIMARY MIDDLE NAME	
PRIMARY LAST/FAMILY NAME	(required)
PRIMARY SUFFIX	Jr, III, etc.; often used to indicate generation.
ALTERNATE NAME	Nickname or preferred alternate name. This information can be used on reports, name tags, and credentials. (These fields won't be visible if you haven't enabled alternate names.)
SOUNDS LIKE (PHONETIC NAME)	If the name is difficult to pronounce, or easily mispronounced, enter a pronunciation hint here. This information can be used on reports, name tags, and credentials.

Tip: Your GMS installation may be set up to automatically adjust capitalization in the name fields. If needed, you can turn off the automatic capitalization feature for this person by checking the IGNORE CAPITALIZATION RULES checkbox at the bottom of the window.

4. Click the **Continue** button to create this person. If the DON'T CHECK FOR DUPLICATE PEOPLE checkbox is not checked, GMS will first look through all of the people already in GMS to ensure that you're not making a new copy of an existing person. If it finds people who may be a duplicate of the new one, it will show you those and allow you to either create the new person anyway, or work with one of the people that it found.

After entering all applicable data on the Individual profile screen, click the **Save** button at the top to finish creating a new person in GMS.

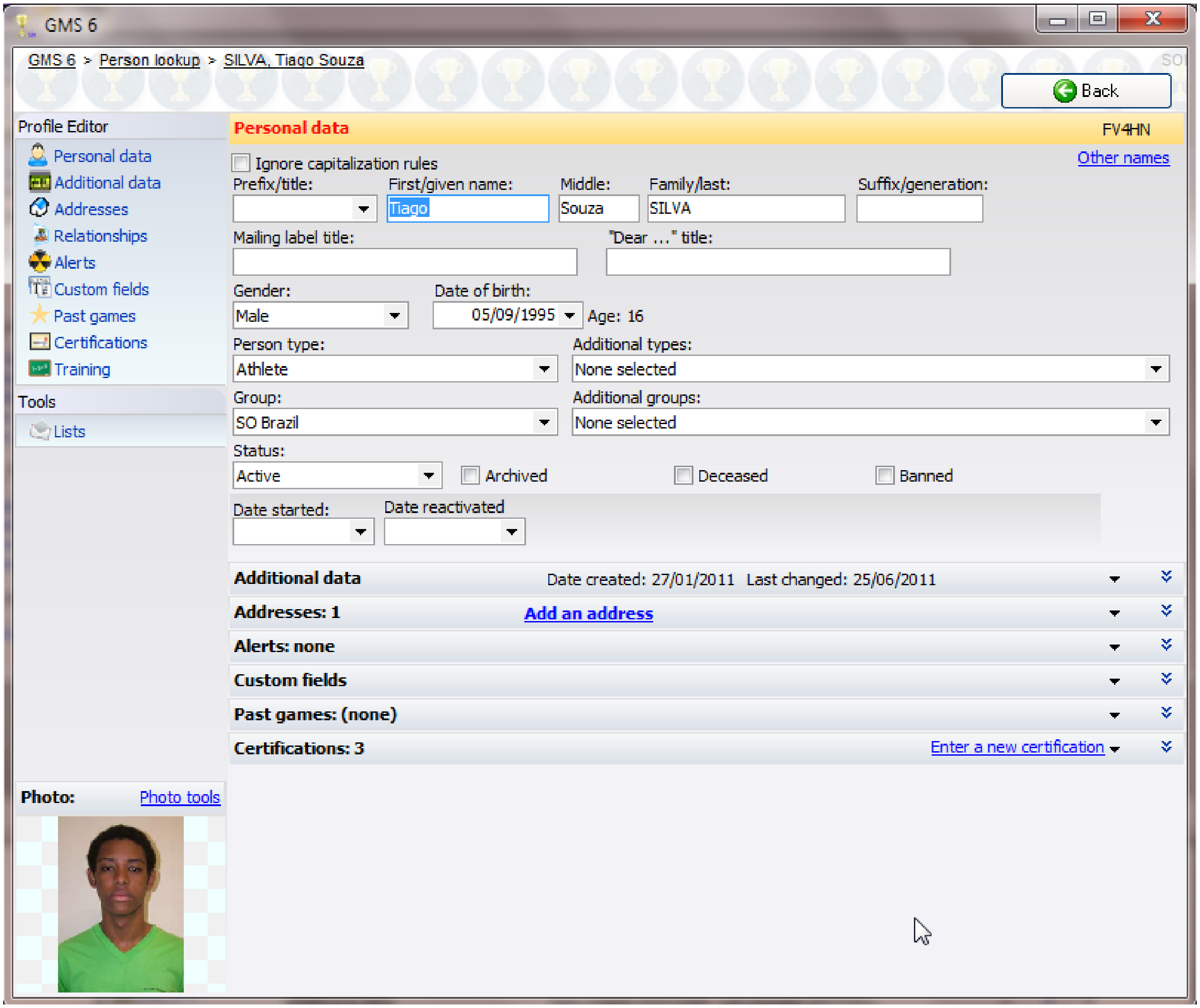
Profile Editor

Concepts

Use the Profile Editor in GMS 6 to view or enter information about a person. The Profile Editor is divided into several panels, covering many aspects of a person's information:

- ***Reports*** (page 19) (clicking on this brings up a list of reports you can run for this person)
- ***Personal data*** (page 19) (name and phonetic pronunciation hints, team name/status, titles, gender, date of birth, person types, group affiliations, Individual type, Individual source, company and status flags)
- ***Additional data*** (page 21) (contact flags, photo ID verification, transitions, comments and images, languages, excluded jobs, nationality, passport information)
- ***Addresses*** (page 22) (includes phone numbers and e-mail addresses)
- ***Relationships*** (page 25)
- ***Alerts*** (page 27) (emergency contact information and medical or dietary alerts)
- Comments
- ***Custom fields*** (page 28)
- Past Games
- ***Certifications*** (page 29)
- ***Background checks*** (page 29)
- Custom application forms
- Lists (clicking on this link lets you add or remove this person from lists immediately)
- ***Trainings*** (page 31)
- ***Credentials printed*** (page 31)
- ***Photo*** (page 31)

Many of the panels on this screen start out hidden until they have something in them, this helps to keep the screen less cluttered. Along the left side the links to these panels are always visible. Some panels, and their corresponding links, will remain invisible if that feature is disabled in your copy of GMS - this is most commonly done if that feature would not be applicable to your organization.



Tip:	Banning a person marks that individual as unacceptable and lists their name and personal data in red text throughout GMS. Banned individuals cannot be selected for any Individual positions.

Click on the person's name to bring up the personal profile screen after finding the person.

Tip:	Changes are not saved (and a new person not created) until you click on the **Save** button.

Reports

The Reports link in the Profile editor, brings up a list of reports which can be run directly on the current person. Selecting one of these reports will require that unsaved changes, if any, be saved before the report will run.

Personal data

These fields form the most basic information GMS knows about a person.

Tip:	When dealing with groups of people who are unlikely to Individual on their own, always work as part of a team and may have varying sizes and memberships, it's not convenient to make a new person record in GMS for each Individual. Marking a person as a team of people makes this person the sole point of contact for multiple people whose names and information you don't track individually.

FIELD NAME	DEFINITIONS AND COMMENTS

Ignore capitalization rules	
Prefix/title	A common list of values is included here, but you can add other values in the Name Prefix tool in the Setup panel.
First/given name	
Middle/Initial	
Family/last	
Suffix/generation	
Other names	The pronunciation hint for a name that may be difficult to pronounce, and/or the person's alternate name. Alternate name fields are commonly used for nicknames, or names in other languages.
Mailing label title	On letters, mailing labels and exports, the field Mailing title will get the value here. If you leave this blank, GMS will use the various parts of the person's name to get an appropriate value. Example: `Mr. Jim Doe`
"Dear ..." title	Like Mailing label title, this value is inserted when the field Mailing dear is used. Example: `Jim`
Gender	
Date of birth	
Person type	The primary type of person, such as an athlete, coach, etc.
Additional people types	Any additional types the person may be, not already specified in the Person type field. You may check as many as are appropriate.
Group	The primary group with which the person belongs.
Additional groups	If a person is affiliated with multiple groups, then you can use this field to identify their other affiliations.
Company	Person's employer. You can enter this one of two ways: by either typing the name in, which stores it directly, or by clicking on the ... button and selecting a group. If the company is linked, any changes to the group's name are automatically reflected here and the name will always be spelled consistently for all employees.
Archived	Archiving is used to track people who are no longer active and are not expected to return. This does not remove the person from database, and the person's hours, assignments, etc. still remain in all reports. It does suppress the person from reports and mailings. The person can later be un-archived easily.

Date archived	Date the person is archived (optional).
Reason archived	Why the person was archived (optional). Note: your administrator can define the options here in the **system setup** (page 199) tools.
Comments	Any free-form text reasons you want to include (optional).

BANNED	A person who is banned cannot register in any Games and may not participate in any way in your organization.		
		REASON BANNED	Why the person is banned. Note: your administrator can define the options available here.
		DATE BANNED	Date the ban is effective.
		BAN EXPIRATION	Date the person's ban is up for review. Note: GMS does not un-ban the person on this date, this must be done manually.
		COMMENTS	This field may be hidden by your administrator.
DECEASED	Rather than deleting a person who has died, check this box. He will be suppressed from most reports and all mailings, but his past Games and historical data are preserved.		
		DATE DECEASED	When the person died (optional).
STATUS	Used to indicate whether the person is active, inactive, prospect or applicant, terminated, rejected or leave of absence. People marked as inactive, terminated, rejected or leave of absence are automatically suppressed from most mailings and some reports.		
		DATE STARTED	Usually the first day the person starts with your organization. GMS doesn't fill in this field automatically - you use it how it makes the most sense for you. You can use this as the date of their application, date they were cleared to become a Individual, date of their first assignment, or whatever the appropriate milestone in your organization is.
		DATE ACTIVE	Date the person most recently became active.
		DATE INACTIVE	Date the person most recently became inactive. If this is blank when you change a person's status to inactive, it will be filled with the current date.
		REASON INACTIVE	Why the person was marked inactive (optional). Note: your administrator defines the values available here.
		INACTIVE FOLLOWUP	Date the person should be communicated with to see if they'll become active again. You can also use this for the expected end date of a Individual's leave of absence.

When entering name information, GMS will apply any automatic capitalization rules that you've specified under *Name Setup Options***.** (page 227) If this causes a name to appear incorrectly here due to an exception to the rules, checking the box IGNORE CAPITALIZATION will let you enter the values without GMS making any changes to what you've entered.

Additional data

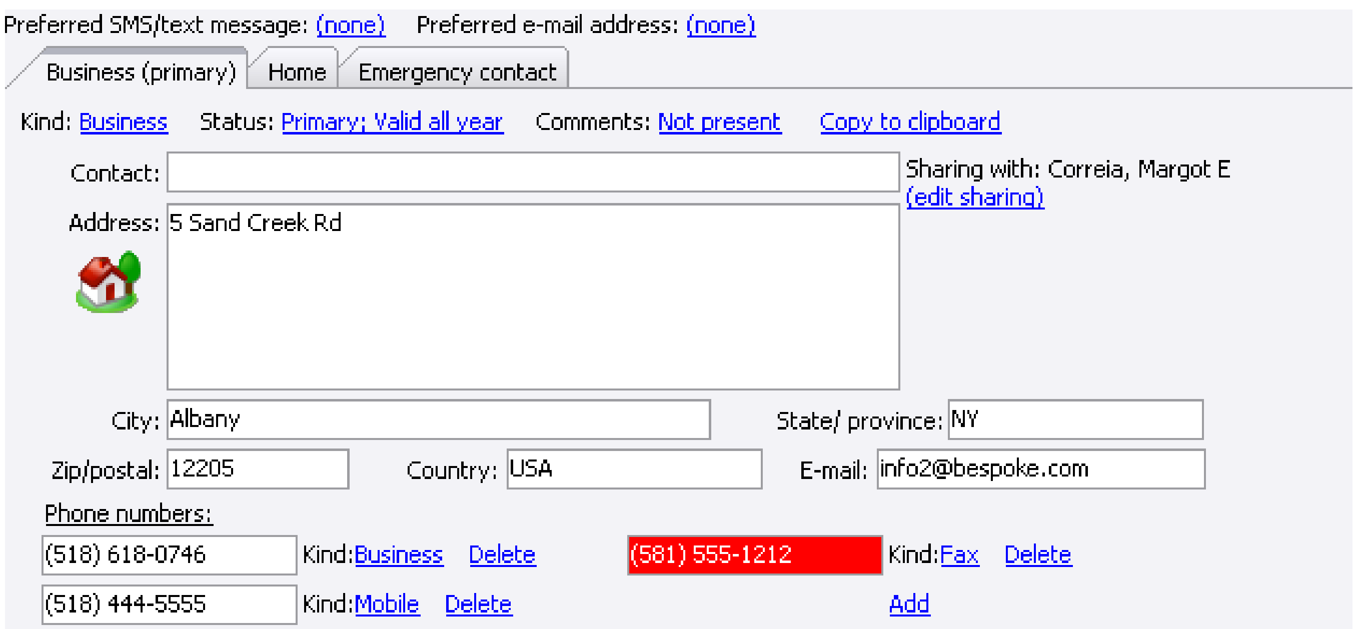
Field/Link	Description
CONTACT FLAGS	Contact flags are preferences on how to contact or not contact the person, such as by e-mail, phone, or mail.
PHOTO ID VERIFIED	The date when this individual's photo ID (driver's license, etc.) was last verified.
PERSON NUMBER	A numeric field with no preset purpose. Leave blank if you do not need it.
Attachments	Lets you view, add, update, and attach files to this person.

PRIMARY LANGUAGE	The person's native or preferred language.
COMMUNICATION LANGUAGE	Preferred language for communication by letter, e-mail, web and touchscreen/kiosk. If this is left blank, the value in the PRIMARY LANGUAGE field will be used for this purpose.
ADDITIONAL LANGUAGES	Any other languages which this person speaks.
NATIONALITY, PLACE OF BIRTH, PASSPORT NUMBER, PASSPORT EXPIRATION	These fields are all entirely optional, and can be hidden altogether: see ***System Preferences.*** (page 199)

The DATE CREATED and LAST CHANGED dates are listed in the **Additional data** bar and show the dates this person was originally created and last modified. You cannot edit these fields.

Addresses

Caution:	GMS lets you have multiple addresses of the same kind for the same person, such as a person who has two business addresses. In this case, you should flag one of them as the primary address in order for mail to go to that address. If you have more than one address of a particular kind and neither of those addresses is flagged as primary, then when you select that kind of address to use in your reports and mailing labels, GMS will use an arbitrary address of that kind.



Field name	Description
PREFERRED E-MAIL ADDRESS	This is the preferred e-mail for the individual to receive an e-mail message.
KIND	Click on the link next to the KIND field and select the new kind of address you want. For example, if you added a new home address and you want to change it to a business address, click this link to change it.
STATUS	Click on this link to mark the address as the primary address, valid all year long, valid only between specific dates, or invalid altogether. If the address is invalid (or not valid on the current date), GMS won't use it in mailings and reports.
COMMENTS	Comments that you may need to associate with this address.
Copy to Clipboard	Copies the address to the clipboard where it can be pasted into another application.
CONTACT	Optional, the name of the contact person at this address. Most commonly used for emergency contact addresses.

(edit sharing)	If a Individual ***shares an address*** (page 24) with another Individual, you can connect the two addresses from this link. Note: This will share all information - address, phone and e-mail. you will need to add a second address for each member to have a unique phone or e-mail address.
ADDRESS	Street address only.
CITY	
STATE/PROVINCE	
ZIP/POSTAL	
COUNTRY	
E-MAIL	You can also enter e-mail addresses in the phone number fields by setting their KIND to E-mail.

Tip: When your cursor is in any of the address fields, hitting the F2 key brings up a prompt for a postal/zip code. Entering one here will fill the CITY, STATE/PROVINCE and ZIP/POSTAL fields automatically if GMS knows this postal/zip code.

Phone numbers

- To add a new phone number, click the Add link beneath the PHONE NUMBERS and select the type of phone number you want from the drop-down list. For example, click Home. The field appears next to the link, and GMS lists the kind of phone number to the right of the field, in this case, HOME.
  Enter the phone number, including the area code, with or without punctuation. GMS does not require any special formatting in these fields.
- To change a phone number's type, click on the link with its type and select the phone type from the drop-down list.
- To mark a phone number as a known bad number, right-click on the number and select Known bad. Bad phone numbers and e-mail addresses show in red, e.g. (888) 988-4467
- To remove a phone number, click on the Delete link next to it.

Adding, changing and deleting addresses

- Add a new address by clicking on the Add an address link, then select the type for the new address.
- Change an address's type by clicking on the link to the right of KIND:, e.g. Business and then select the new type.
- Set an address's status or mark it as valid only during specific dates, click on the Valid all year link.

Tip: An address of type Emergency contact will never be used by GMS for mailings unless it's specifically selected in that mail merge.

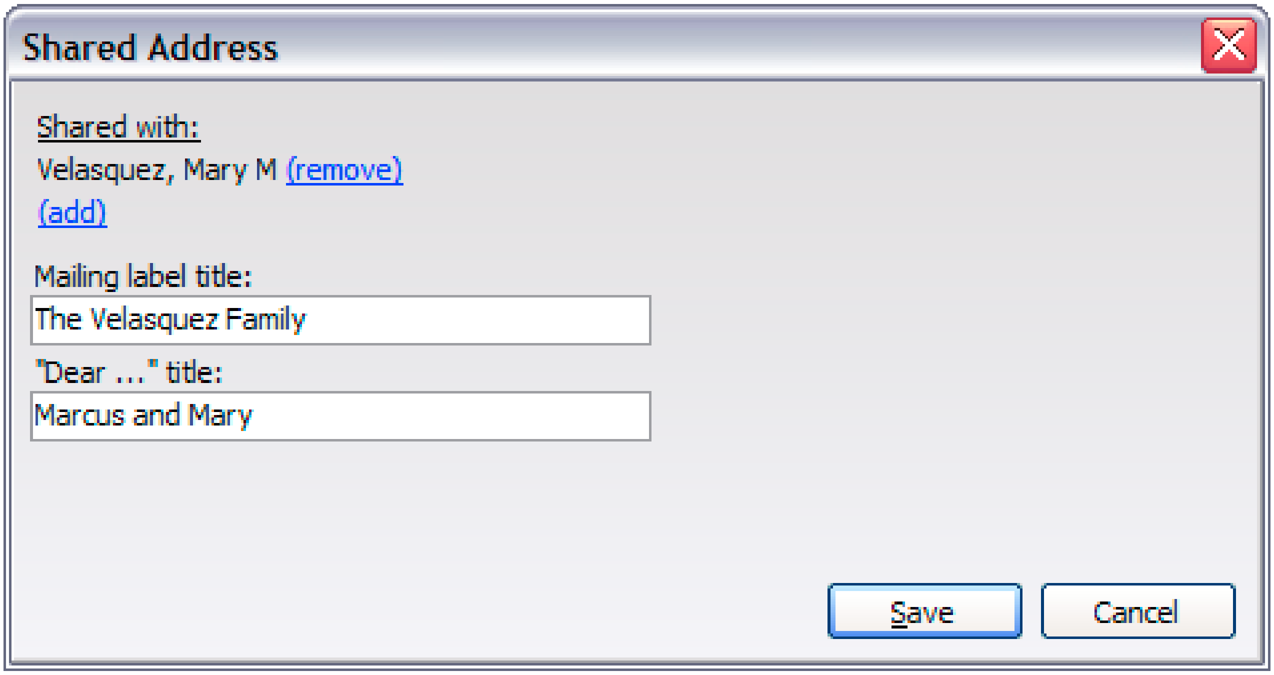
Shared Addresses

Every person in GMS is their own person: husbands, wives, partners, children - all have their own records, their own assignments, history and contact information. Sometimes you'll want to send just one copy of a mailing to everyone in a household, e.g. a "Save the date" postcard for an upcoming event, and GMS has the solution for that: shared addresses.

Within a person's addresses, you can mark addresses as "shared" - that is, the same address is used by more than one person. If the address is updated in one person's profile, it's updated in everyone's. Since GMS knows that this is an address common to multiple people, it can, when told to do so, send just one copy of the mailing when otherwise each of those people would have gotten their own copies.

Editing shared addresses

1. Click on the (edit sharing) link, bringing up the list of people who currently share this address.
2. Click on (add) to add a person to share this address. Use the person lookup tool which comes up to search for the appropriate person.
3. If the person you selected has one or more addresses, GMS will prompt you to use the other person's address or the current one. **Note: The address which you don't use will be deleted when the data is saved.**
4. Add additional people, for example children living at home, to this list by clicking on (add) again.
5. Set the MAILING LABEL TITLE field, this shared label will be used in place of each individual person's MAILING LABEL TITLE field. If this is left blank, the person's MAILING LABEL TITLE field will be used instead.
6. Set the "DEAR.." TITLE field, this will be used in place of the person's "DEAR ..." TITLE field. If this is left blank, the person's "DEAR ..." TITLE field will be used instead.
7. Click **Save** when completed.



Relationships

Concepts

Relationships are used to indicate the connections from one person to another or a person to a group. Most relationships are two-way, meaning that they will show up on the screens of both connected entities (people or groups). For example, under "Jane Doe" if you show that "Jimmy Doe" is her son, on Jimmy's screen, you'll see "Jane Doe" listed as his parent.

GMS comes with a built-in list of standard relationships. You can't add to this list, but you can hide items which aren't relevant on the Advanced panel under System Preferences on the Setup panel.

Built-in relationships:

Parent/Child	Co-worker
Sibling	Spouse
Partner	Donor/Charity
Employer/Employee	Partner
Individual/Organization	Friend
Referrer/Individual	Mentor/Student
Teacher/Student	Boyfriend/Girlfriend
Board member/Board	Job chairperson/Job
Job co-chairperson/Job	Supervisor/Supervised
Group leader/Group	General coach/Athlete
Games coach/Athlete	Referrer/Athlete
Head of delegation/Delegation	Assistant head of delegation/Delegation
AS Staff/Delegation	Joint Individual
Former spouse	Parent-in-law/Child-in-law
Cousin	Aunt or Uncle/Niece or Nephew
Chaperone/Athlete	Second cousin*
Step-parent/Stepchild*	Extended cousin*

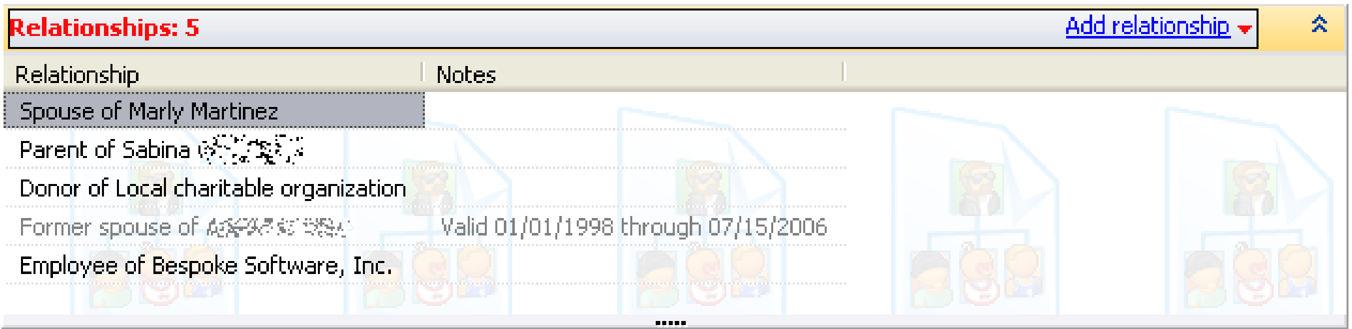
Grandparent/Grandchild* Great-Grandparent/Great-Grandchild*

Deduped to/Deduped from

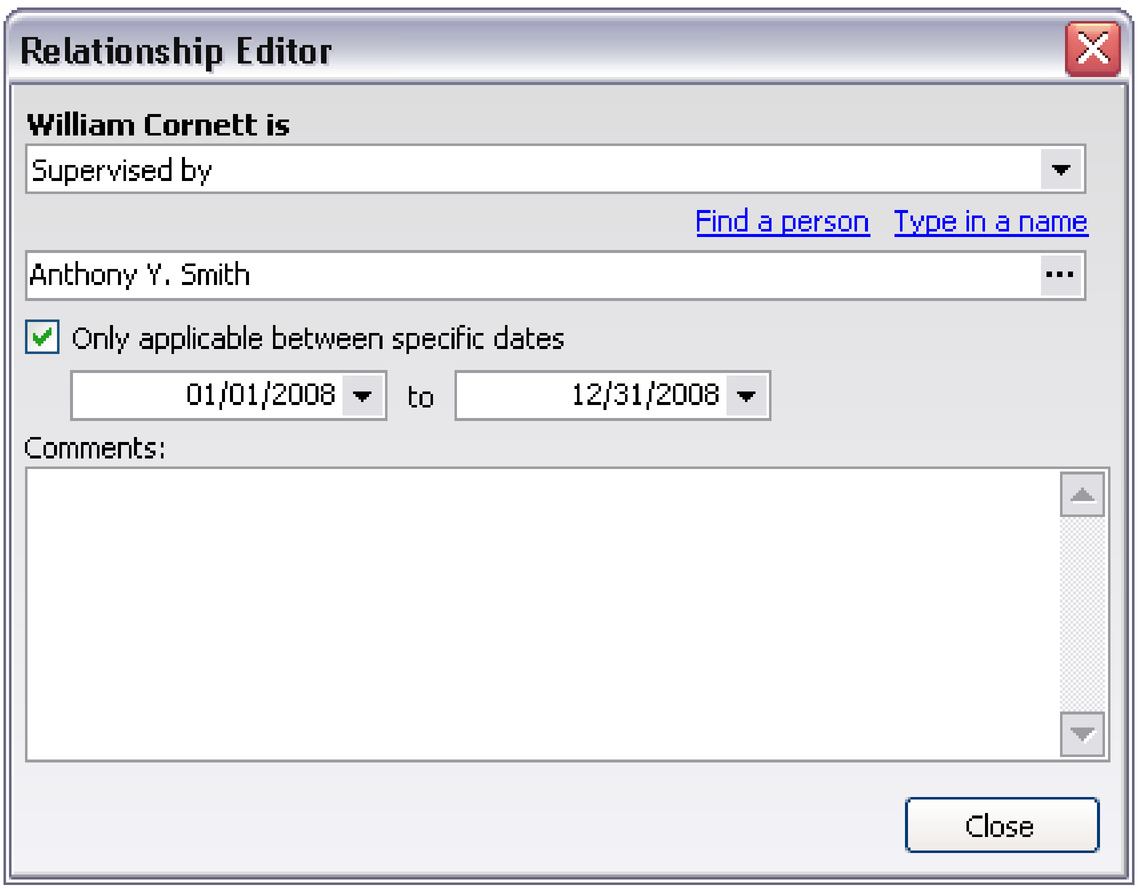
* items marked with a star are hidden by default.

Entering Relationships

From the **Relationships** panel in the **Profile Editor** or in any group editor, you can see all of the relationships that a person or group has. (If the person has no relationships yet, this panel will be hidden. Click on the **Relationships** link on the left side to add one.)

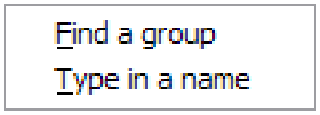


If the **Relationships** panel is present, click the **Add relationship** link to add a new relationship. Click on any existing relationship to edit it, right-click on a relationship to **add** a new one, **edit** or **delete** an existing one.



The first field defines the relationship from the current person's perspective, and the second field is the person or group to which the person is related. The relationships listed as options will vary depending on the circumstances:

- group-specific relationships, e.g. Employer/Employee, won't show when you're working with a person
- person-specific relationships, e.g. Employee/Employer, only show when working with a person
- Relationships which work only within a Games, e.g. Games coach/Athlete, only show when working within a Games.
- To edit the related person or group, click on the "**...**" button. You'll get a menu like:

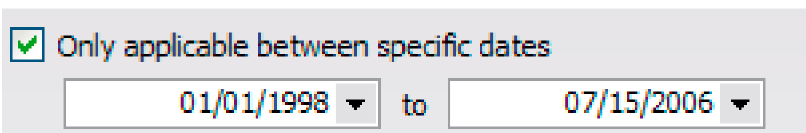


Select Find a group to locate a group (or delegation when within a Games), or Find a person to put a group or person here who exists in GMS. When you select the relative this way, the relative also sees the relationship. For example, opening up the group "Bespoke Software, Inc." will show "Michael Robert Chevrette Jr." as an employee.

You can also select Type in a name, and from there enter the name of the person or group. Use this when the target doesn't exist in GMS, for example when the relative is a child or employer you don't track in GMS. The downside to this is that by entering a name here, you're not connecting to a real person or group, and as such can't see the relationship from the opposite side.

Expiring Relationships

Relationships can have date ranges associated with them. Michael is an employee of Bespoke Software. If he retires, check ONLY APPLICABLE BETWEEN SPECIFIC DATES and enter as the end date the date he retired. When reports are printed and people are filtered beyond that date, this relationship won't display anymore, but we can see it in the listing of relationships here.



Entering only a start date means the relationship is valid from that date forward. An end date alone means it's valid up to and including that date. Both dates means it's valid between the two dates, inclusive.

Alerts

If there are any alerts other than an emergency contact, "Alerts: PRESENT" shows in the bar to highlight the fact that alerts exist.

Field name	Description
REQUIRES WHEELCHAIR AND/OR HANDICAPPED ACCESSIBLE LOCATIONS	Also use if the person can only access locations specified as handicapped-accessible.
EMERGENCY CONTACT	Name and phone number of a close relative or friend who could assist as needed in the event of an emergency. Use the Individual's addresses to store their complete emergency contact information. **Note:** This field is present solely for backwards compatibility.
MEDICAL ALERTS	Important medical information.
DIET ALERTS	Any special dietary restrictions.

Custom Fields

The GMS developers make no pretense of being able to predict every bit of information you'll need to track, and so you can create and use any number of custom fields within GMS. The Custom fields panel shows these fields and their values for that individual person.

Custom fields can be set up globally, so they are available everywhere, both within and outside of Games. They can also be Games-specific, that is, set up specifically for a Games and only accessed within that Games.

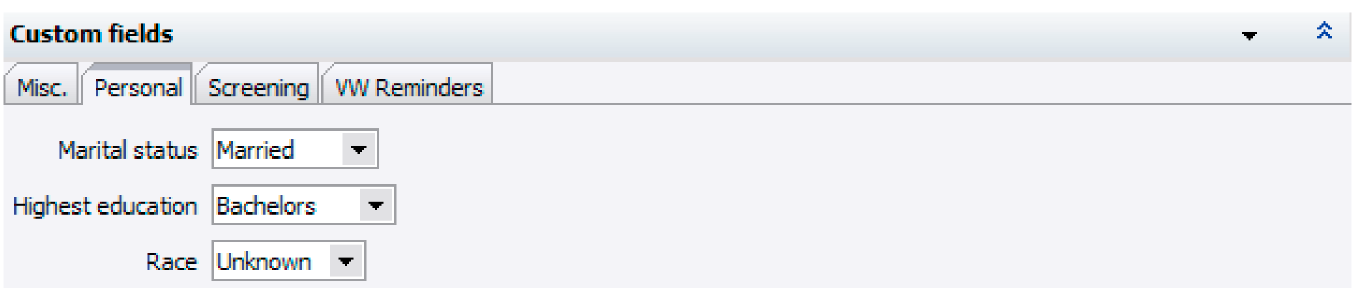
If your administrator created any custom fields for your organization, you will see Custom fields listed when you view, edit, or change personal information. *If your administrator did not create any custom fields for your organization*, Custom fields will not display.

There are various types of fields that may appear on this panel, depending on what your administrator set up. Enter information in the custom fields on the screen.

Field Types	Definitions and Comments
Text	Simple one-line text field.
Memo	Accepts multiple lines of text.
Date	See *What GMS Looks Like: Conventions and Getting Around* (page 4) in the *Getting Started* section of this manual.
Number with decimals	Accepts numbers, including decimal places.
Number without decimals	Accepts whole numbers.
Yes/No	Represents a yes/no or true/false value.
List of specific choices	Displays a list that lets you select only one choice.
Checklist of specific choices	Displays a list, such as a drop-down list of check boxes, that lets you check multiple selections from the list.
Grouping	Lets you group multiple people together. Click on the three dots **"..."** to the right of this field or press the **F2** key to select a person for this grouping.
Role	Associates one person with another person. Click on the three dots **"..."** to the right of this field or press the **F2** key to select a person for this role.

Example

We track the marital status, education and race of our Individuals for reporting purposes to track our efforts in reaching the widest and sometimes ignored portions of our local community. To that end, we've created custom fields to store this data for each Individual.



Past Games

Certifications

Certifications are groupings of values which are stored together. They may have effective and/or expiration dates and statuses. They can be used as filters, as the basis of reports, and as requirements for the touchscreen/kiosk. Examples of certifications include Education/employment, General Release, General Medical Release, and Individual Experience. The Certifications panel shows all of the certifications entered for this person. Edit a certification by clicking on it, enter a new certification by clicking on the Enter a new certification link, or edit, view and delete individual certifications by right-clicking on them individually.

Certifications can be configured under Certifications on the Setup panel on the GMS 6 main screen.

The values in the columns STATUS, RESULT and OTHER can be configured by your administrator to show any of the fields within the certification.

Some certifications may only be configured to be available for specific types of people. If you're trying to add a certification to someone and that type is not showing, check with your administrator.

Example

We have a Individual, David Donovan, who worked with us once before on an annual fundraising event. Mr. Donovan has decided to become more involved in our ongoing work. He would like to provide counseling and comforting services to families of critically ill patients at the hospital. This Individual position does not require a clinical license to provide this service, but it does require relevant experience, a background check, a personality profile and interview with one of the medical center psychiatrists to evaluate his aptitude for this work, and some medical center policy and procedure training.

I'll use the Certifications panel in the Profile Editor to enter Mr. Donovan's personal background and experience. With his personal data displayed, I open the Certifications panel. I see that he already has a General Release from his previous Individual work with the hospital. I click that certification to view the details of it, and see that his photo is also on file in the Scanned images link in the upper right corner. I click the **Back** button to return to the Certifications panel.

To enter his personal background information, I click the link to Enter a new certification, and choose Personality Profile. After completing the pertinent fields, I click the **Save** button. I now see that his Personality Profile has been added to his list of certifications.

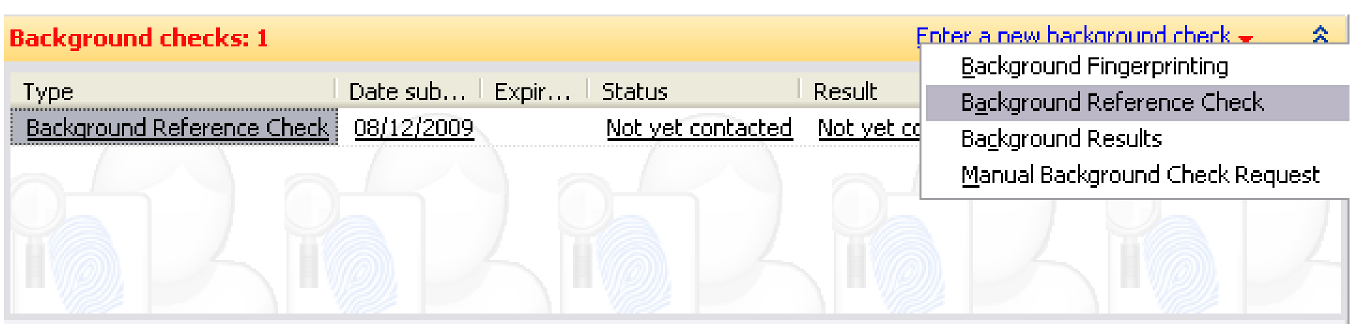
I also need to enter his education and work history. I click the link to Enter a new certification, and choose Education/Employment. When I'm done entering the information I click the **Save** button.

Background checks

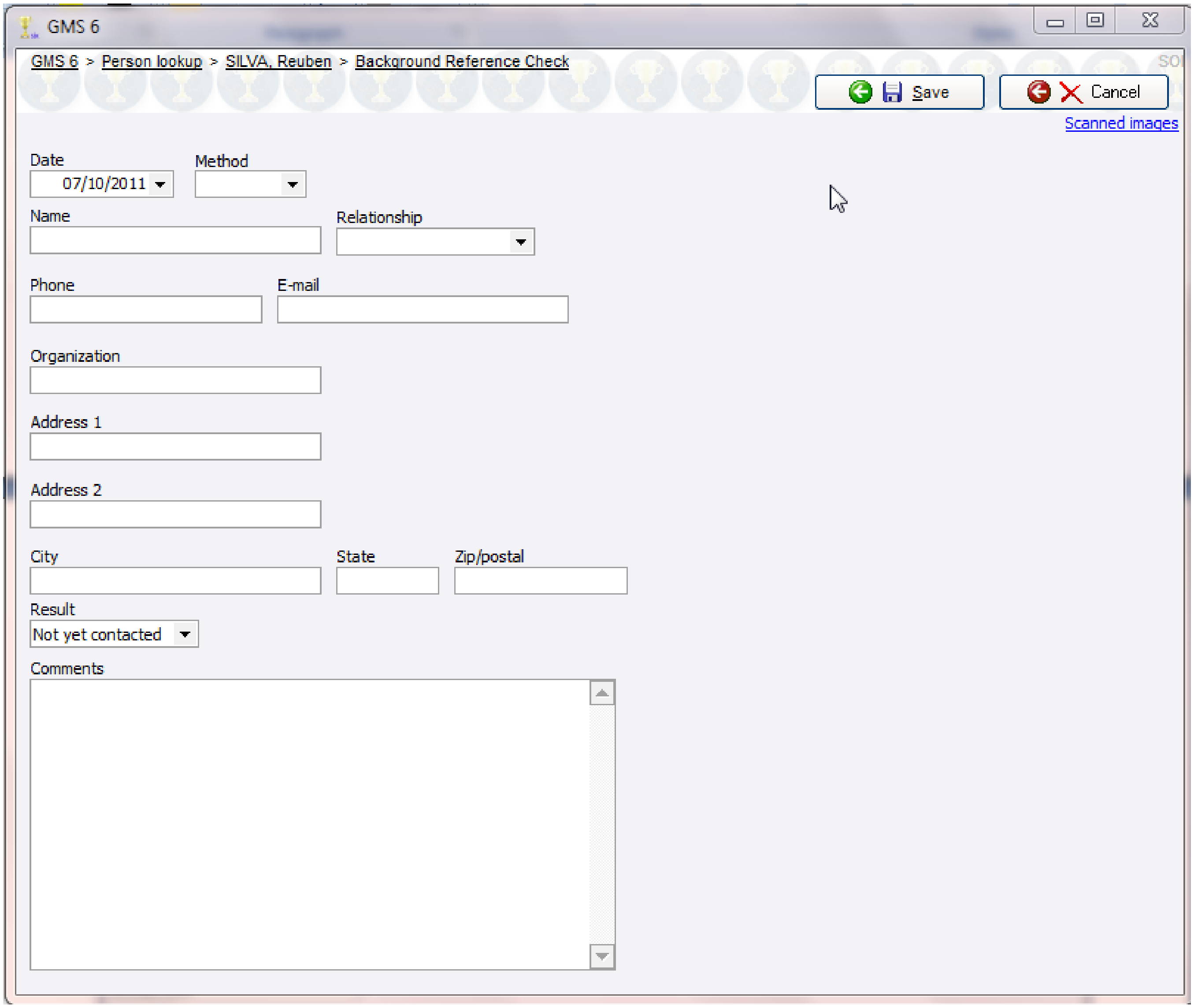
This panel shows the background check requests and results for this person. Enter a new background fingerprinting request, a background check request, result or reference check by clicking on the Enter a new background check link. Or right-click on an individual item to view, edit or delete it. See the *Individual Screening* (page 145) section for more details on background checks.

Example

David Donovan is undergoing preparation and training to provide counseling and comforting services to families of critically ill patients. He has already undergone the mandatory screening by a medical center psychiatrist, and now I need to send out letters to check his references. I look up David Donovan in GMS and click on his name to edit his personal data. I open the Background checks panel, and click the link to Enter a new background check.



In the pop-up menu, I choose Background reference check.

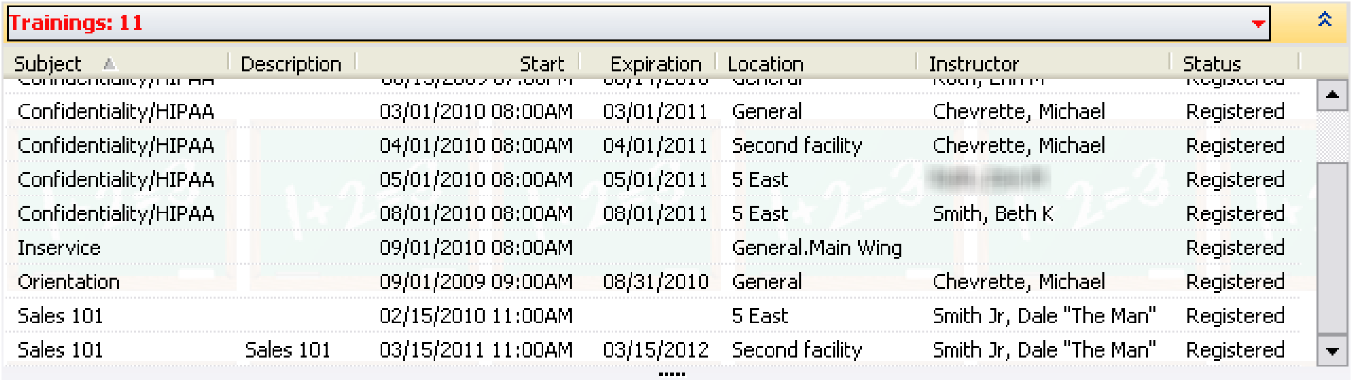


I complete the fields for the contact information on his reference, and click the **Save** button. If David had provided us with additional references, I'd enter those as well by clicking on the Enter a background check link and repeating the previous steps.

To actually mail the reference letters, you'll need to return to the GMS main screen, open the Applicant screening panel, and choose Print reference check letters. Here you could print them for many Individuals at once (see the section on *Individual Screening* (page 145)).

Trainings

Trainings help you track what classes your Individuals have taken. This panel shows all trainings that this person has completed or is scheduled for.


Trainings: 11

Subject	Description	Start	Expiration	Location	Instructor	Status
Confidentiality/HIPAA		03/01/2010 08:00AM	03/01/2011	General	Chevrette, Michael	Registered
Confidentiality/HIPAA		04/01/2010 08:00AM	04/01/2011	Second facility	Chevrette, Michael	Registered
Confidentiality/HIPAA		05/01/2010 08:00AM	05/01/2011	5 East	[illegible]	Registered
Confidentiality/HIPAA		08/01/2010 08:00AM	08/01/2011	5 East	Smith, Beth K	Registered
Inservice		09/01/2010 08:00AM		General.Main Wing		Registered
Orientation		09/01/2009 09:00AM	08/31/2010	General	Chevrette, Michael	Registered
Sales 101		02/15/2010 11:00AM		5 East	Smith Jr, Dale "The Man"	Registered
Sales 101	Sales 101	03/15/2011 11:00AM	03/15/2012	Second facility	Smith Jr, Dale "The Man"	Registered

Click **Training** on the left menu to add a person for training or right-click on any training item to **add**, **edit** or **delete** it. When registering someone for a course via the **Training** menu link, only upcoming courses are shown.

You can right-click on any training record to send a letter to the person in the training if you have any letter templates set up which are based on training records.

Trainings which are part of a training course can only have their STATUS and EXPIRATION DATE edited, other properties like START, LOCATION and SUBJECT are derived from the course itself.

Credentials Printed

Credentials are ID passes which identify athlete, caoches and staff and allow them access to the appropriate places at your Games. This panel shows all of the credentials printed for this person, along with the type, date printed, expiration date and Games.

The information on this panel is generally read-only, meaning that you can't edit it here. To print a new credential, follow the *Printing Name Tags, Badges and Credentials* (page 168) instructions. The only change you can make here is to mark a credential as cancelled, which will make it unusable for signing in via a kiosk. To cancel a credential, right-click on it and select **Cancel this credential**. Once a credential is marked as cancelled and it's been saved, it can not be un-cancelled in the future.

Portrait Photo

GMS lets you add portrait photos for people. These photos can be used for ***credentials, ID badges*** (page 168), and will print on some reports, such as the ***People*** (page 90) report. If a photo has been attached, you'll see it in the **Profile Editor** on the upper right corner of the screen, under the **Photo** bar.

To attach a photo, click on the **Photo Tools** link on the upper right corner and a drop-down menu opens that lets you attach a photo from a disk file or scanner, or select a scanning source. An **Image Adjustment** window will open with options to rotate or resize the photo.

The portrait photo should only include a person's head and shoulders and should normally be no more than 800 pixels on a side (600 x 800 is recommended).

If a photo already exists when you click on **Photo Tools**, a drop-down menu lets you **save**, **delete**, **adjust** or **crop** the image, or **copy** the image to the clipboard.

Enter Name, Address, Phone Number and E-mail Changes

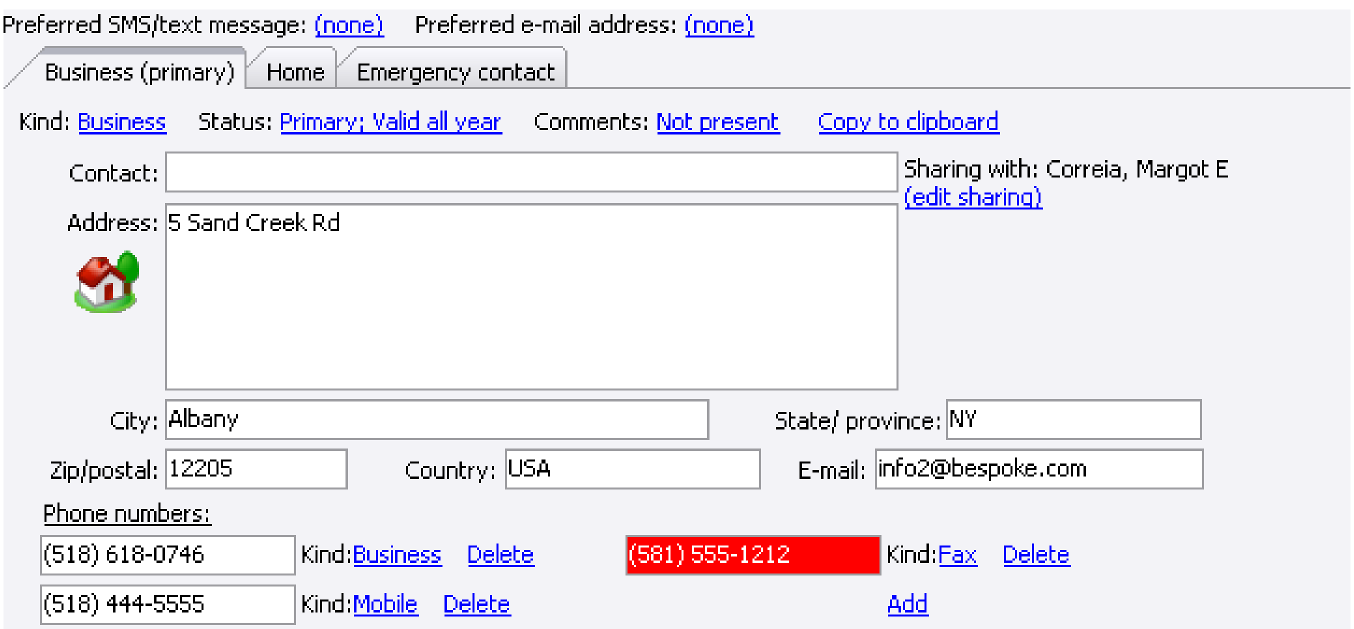
Concepts

The standard profile editor is very complex and may take several seconds to bring up a person's data. If you are primarily editing someone's simple personal data (name, gender, date of birth) and addresses, this is a faster and simpler tool to search and edit from the Data Entry panel.

Steps in this task

1. From the GMS 6 main screen, click on the Enter name, address and phone changes link on the Data entry panel.
2. You'll find the same person lookup tool as elsewhere. Use this to search for the person to be updated.
3. Click on the person to see the simple **personal data** and **addresses** editor.
   Edit the information here as appropriate, then click on the **Save** button.

Tip: If you find that you have changes to make that require the full profile editor, clicking on the Switch to detailed view link on the left will open the full editor without having to exit and find the person again.



Banned People

Concepts

A banned person is one who is never allowed to participate with your organization. Use this for people who fail background checks or have shown themselves to be otherwise unacceptable under any circumstances. When registering someone in a Games, GMS will check to see if the person is banned, or if he matches any significant attributes of someone who is banned. People who are banned are locked out altogether. Those who match attributes of banned people result in the user being prompted to ensure that they are not the banned person.

Tip: If the person you want to ban is not yet in GMS 6, create that person and then mark him as banned.

On lists of people in GMS, banned people show in red to highlight their status:

Name	DOB	G...	Person ...	All groups	Company
Cornett, Michael R		Male	Volunteer	High Risk (ED/PC SDS),Non Exempt	
Cornett, William		Male	Staff	Bespoke Software Inc.	Bespoke Software, Inc.

It's important to provide complete information about banned people, especially gender, date of birth, e-mail addresses and phone numbers. When GMS checks to see if someone is banned, it also checks to see if the person is similar to someone who is banned, and these are the best attributes for GMS to automatically search.

The easiest way to mark people as banned is simply to use the Profile Editor. Find them using any of the Person Lookup tools, edit them, then mark them as banned.

Field name	Description
REASON BANNED	The values here are defined by your administrator.
DATE BANNED	Date the ban is effective. Note: even if the person's banning date is in the future, you still cannot register the person into jobs in the past.
BAN EXPIRATION	Date the person's ban is up for review. GMS will not automatically un-ban the person on this date, that must be done by a human.
COMMENTS	This field may be hidden by your administrator.

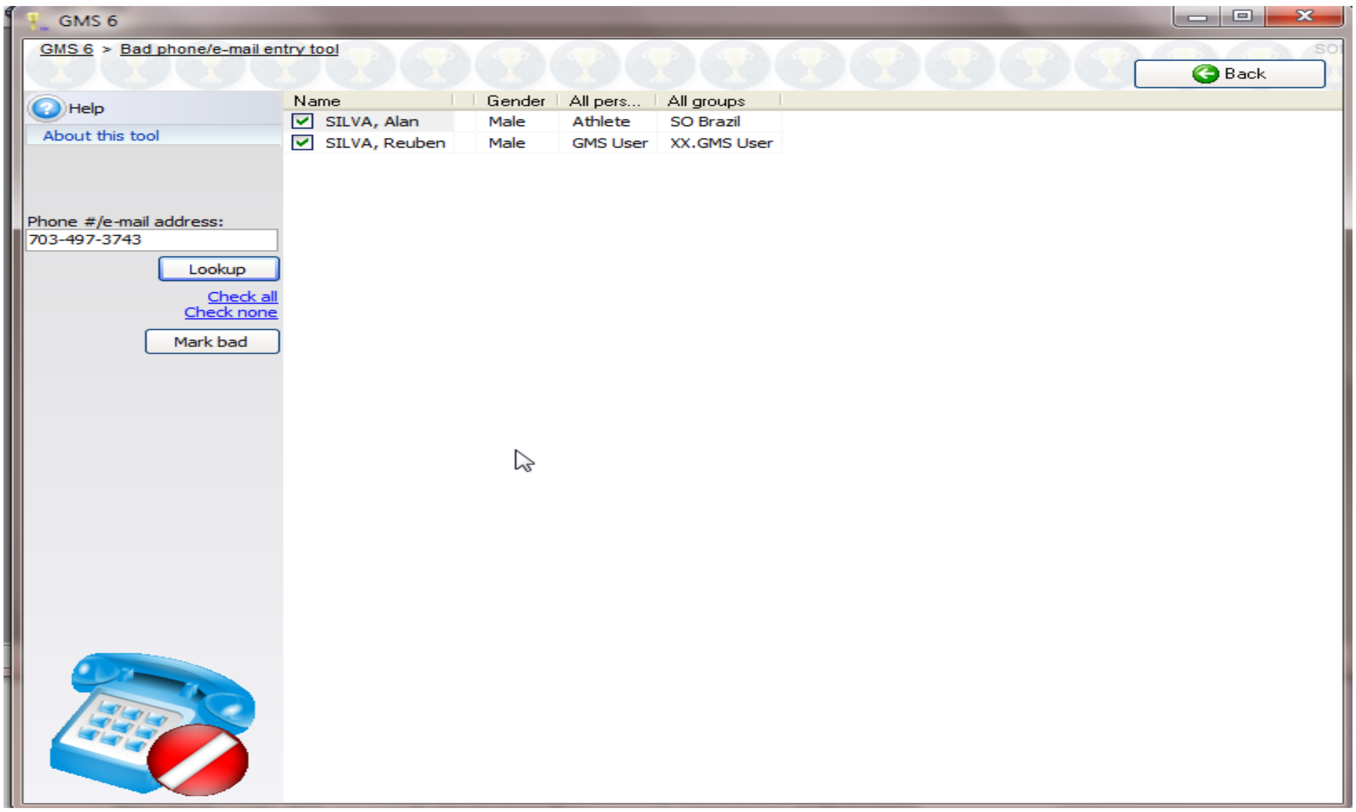
Mark Bad Phone Numbers and E-mail Addresses

Concepts

GMS gives you a quick tool for marking individual phone numbers and e-mail addresses as bad. This doesn't mark the person as "do not call" or "do not e-mail", it's meant to mark the phone number or e-mail address itself as bad for this person so you don't try to re-contact the person again with this number or e-mail address.

Steps in this task

1. From the Data entry panel, click on Mark bad phone numbers/e-mail addresses.
2. For each person, one at a time, type in the bad phone number or e-mail address.
   Click the **Lookup** button.
3. GMS will bring up a list of all people who have that phone number or e-mail address and check all of them.
4. To mark the phone number as bad for all of the checked people, click the **Mark bad** button.



You can also right-click on an individual person for more tools you can use on that person.

Edit	Brings up this person in the profile editor.
Update addresses and phones	Opens the simplified profile editor (name and addresses only).
Open read-only	Brings up this person in the profile editor in read-only mode.
Comments and images for this person	Let's you associate pictures and comments with this person.
See tracked changes	Shows all changes made to this person. Only visible if ***tracing*** (page 199) is enabled.
Send this person an e-mail	If this person has a valid e-mail address, brings him up in your e-mail application.
Copy name and address to the clipboard	Copies this person's name and address to the clipboard for you to paste into another application.

Tip: If you accidentally mark a phone number or e-mail address as bad, the only way to un-do that is to open each person individually, go to their Addresses panel, and fix each phone number/e-mail address individually by right-clicking on it.

Finding People Using Advanced Criteria

Concepts

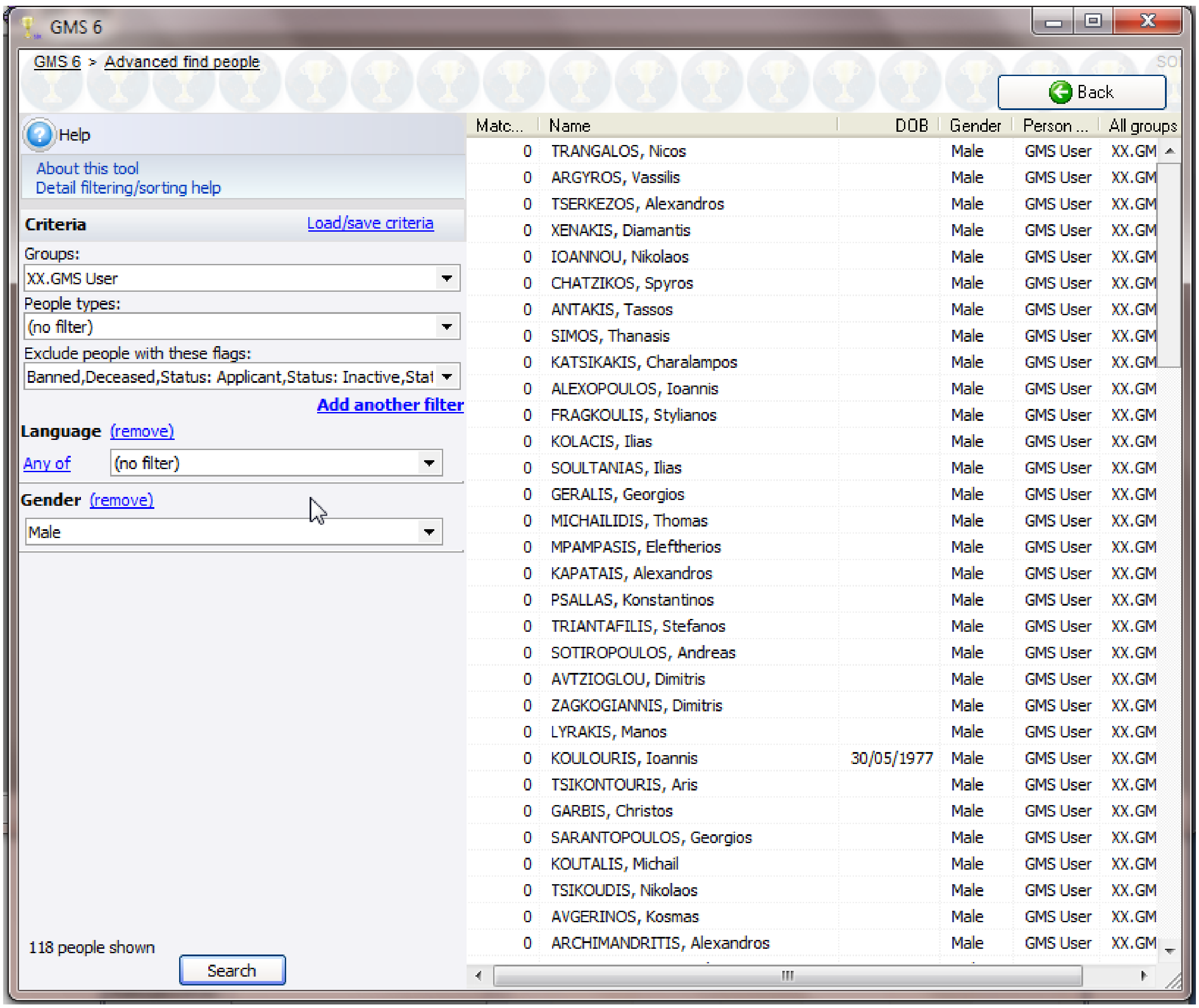
Under the Person Lookup panel on the main GMS 6 screen, this tool also finds people, but lets you specify your own criteria. The default criteria are GROUPS and TYPES OF PEOPLE, and the results returned will be only people who are in the given groups and of the given types.

Steps in this task

Click on the Add another filter link to see a list of methods by which you can filter people. You can add any number of criteria here. For a person to be listed, he must meet all of them.

The following example found all people who:

- have Individualed in 2007, (Assignments/co**mpleted hours**)
- speak both ASL and English, (**Language**)
- and live within 50 miles of the zip code 12063 (**Zip/postal code proximity**)



Combining Duplicate People

Concepts

If you have the same real-world person in GMS more than once, you can combine the two GMS people together to form a single person with the attributes of both.

What's transferred?

- All addresses and phone numbers
- Certifications
- Background check requests and results
- Custom field values where the person to be deleted has a value and the person to be kept does not
- Comments and photos
- Contact flags, and other similar options

You can only combine two people at a time. If the same person is entered in GMS three times, combine them in two stages: copy #1 and #2, then the result of that with copy #3.

Steps in this task

1. Identify one of the copies to be combined together using the **person lookup** tool (By personal data... on the Person Lookup panel)
2. Right-click on one of the duplicates and select De-duplicate (merge) with another person (about halfway down the menu.) If the other copy is on the search results list right now, select On this list, otherwise Not on this list.
3. The Person De-dup Wizard comes up. Click the **Next** button.
4. On the Find second person/Select second person screen, if you selected On this list, all of the people on the search list from before come up. Select the second copy of your person here.
   Otherwise, the person lookup tool shows. Use it to find and select the second copy of your person.
5. Click the **Next** button to get to the Which person to keep screen. Choose which of these two copies will be kept. The one not chosen will be deleted with his information transferred to the copy which is kept.
6. Click the **Next** button to get to the Finish screen.
7. Read the summary of what will be done. If all is correct, click the **Finish** button and GMS will combine these people together. Otherwise, click **Cancel** to abort the process, or **Back** to change your options.
8. After clicking **Finish**, GMS brings up the retained person in the profile editor. Make any changes necessary here. You'll probably find duplicated addresses and phone numbers, and possibly other issues which need human correcting.

Caution: If you combine duplicate people using GMS 5, important GMS attributes like hours and assignments **will not be transferred**. GMS, on the other hand, does transfer all GMS information. This makes it important to use GMS 6 for these operations, not GMS 5, since GMS 5 does not understand many of the features in GMS.

People Filters

GMS 6 lets you define your own filter criteria in many places, including:

- mail merge
- ***exporters*** (page 150)
- many ***reports*** (page 90)
- advanced person lookup

Generally these places have an Add another filter link, which is how you add the first and later criteria to your filter. The layout of the tool can vary, some displaying more options than others, depending on where the filter is being used.

Initial criteria

The values you set here are the most efficient and fast. GMS first finds the people who match these criteria, and then further narrows them by any other filters you add.

Initial source - this is where GMS will start its search for people to include.

Options here may include, depending on where the filter is used, All people in the system, People on one or more lists, People registered in this Games, People with specific certifications, Individual hours, Assignments, Trainings, Mandates, Interviews, Memberships and Account records.

After selecting an initial source, GMS will give you a list of possible filters which will vary depending on the source you selected. For example, selecting Individual hours will give you options for filtering on the person's gender, age, group and type, as well as on the hours record's job/job group and date.

Additional filters

You can add any number of additional filters to further winnow down the people who were selected in the initial criteria above. Below you can see for example, that starting with Addresses/contact information, will allow you to choose more specific pieces of data within that category.

Addresses/ contact info	Addresses	Filter on the presence, validity and completeness of addresses for this person.
	Contact flags	All/Any/None of the contact flags you specify.
	E-mail address	Include only those with a valid e-mail address or Exclude those with a valid e-mail address.
	Phone number	Include only those with a valid phone number or Exclude only those with a valid phone number.
	State/county	Comma-delimited lists of states and counties. Only people with addresses matching both of these fields are included.
	Zip/postal code	List one or more zip/postal codes, separated by commas. People who have any address with one of these zip/postal codes will be included.
	Zip/postal code proximity	Given one or more zip/postal codes separated by commas, GMS finds any other zip/postal codes within the given distance of these, and which are in the states/provinces that you provide. It then goes and finds all people who are in any of this larger list of zip/postal codes.
Custom application forms	Requires the presence of specific types of custom application forms during the dates you specify.	
Dates	Date person created	Minimum and maximum creation date range.
	Date person started	Minimum and maximum date range for the person's start date.
	Last changed	Minimum and maximum last changed dates.

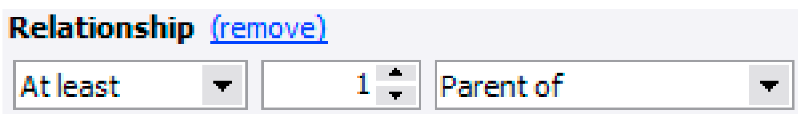
Groups and types	Additional group	Person must have one or more of these as his additional groups.
	Additional type	Person must have one or more of these as his additional types.
	Primary group	Person's primary group must be on this list.
	Primary type	Person's primary type must be on this list.
Others	Certification	Has one or more certifications of the selected types. Allows filtering on the detailed values within each certification.
	Comments attached	Either those with or without comments of specific types during a time period.
	List	On all/none/any of a specific set of lists.
	Printed name tag/credential	Has or does not have a valid credential/name tag.
	Relationship	Presence or absence of relationships of specific kinds.
	Training	Has or does not have training. Allows detailed filtering on the trainings themselves, including status.

Personal properties	Age	Person's age on the current date.
	Communication language	Person's communication language, regardless of any other languages he speaks.
	Custom field	For any global or Games custom field, lets you specify the values or absence of values for that field.
	Date of birth	Specifies the valid range for the person's DOB. To send out birthday post cards, check the box IGNORE YEAR PORTION OF DATE. Then set a DOB range from 01/01/2001 to 01/31/2001, and all people who were born in January of any year are included.
	Entrant image	Include entrants with images or Exclude entrants with images. This refers to the person's portrait photo.
	Gender	Male, Female, and Unknown.
	Language	All/Any/None of these languages. The person can have this as his primary or additional languages and qualify.
	Person name elements	Advanced filters on the aspects of a person's name: Last/family, First/given, Middle, Prefix/honorific, Suffix/generation, Team.
	Primary language	Person's primary language, regardless of any other language he speaks.
	Security user	If GMS security is enabled, filters for including and excluding security users by status, superuser status, and user IDs.
	Wheelchair/requires handicap access	Include only entrants requiring a wheelchair or Exclude entrants requiring a wheelchair

Games	Games registration	All/Any/None filters on the person's registration within a checklist of Games with specific roles
	Games registration by date	Include or exclude people based on their registration within any Games within a date range.
Statuses	Active status	Include or exclude people on their status: Active, Inactive, Prospect or Applicant, etc.
	Archived	Include only archived people or Exclude archived people
	Banned	Include people on banned list or Exclude people on banned list
	Deceased	Include only deceased people or Exclude deceased people
	Inactive	Include only inactive people or Exclude inactive people
	Inactive date	Date range for the person's INACTIVE DATE field.
	Inactive followup date	Date range for the person's INACTIVE FOLLOWUP DATE field.
	Years since first started	Requires that the number of full years between the current date and the person's DATE STARTED be within a certain range.

Relationships

People can be filtered based on their relationships in ***reports*** (page 90), advanced searches and in Intellilists. Adding the filter "Relationship" brings up an editor like:



1. The first field sets the quantity of the relationships required to meet the criteria, as a choice of No, At least, Fewer than or Exactly.
2. Choosing anything but No shows another editor, this one for setting the required quantity.
3. The first item is a checklist of the relationship types which you're looking for.

The filter for relationships doesn't filter the relationships. Instead it restricts the people listed to those who meet the relationship criteria you enter. Once the person meets your criteria, all of their relationships are included.

Examples

At least	2	Parent of	A parent with two or more children.
Any		Child of	A person with one or more parents.
Fewer than	4	Teacher of	A teacher with zero, 1, 2 or three students.
Exactly	1	Donor of	People of any type who have given to just one charity, not zero or 2+ charities.
At least	1	Cousin of, Sibling of	People who have at least one cousin or sibling.

In most searches, reports and in Intellilists, you can add the criterion "Relationship" more than once. For a person to be included, he must meet all of the relationship criteria that you specify.

Within a Games, relationships with valid date ranges are considered to be in effect if the relationship is valid on either the first or last day of the Games. Outside a Games, the relationship is in effect if it's valid on the day the report is run.

Features

Games

Concepts

A Games can be:

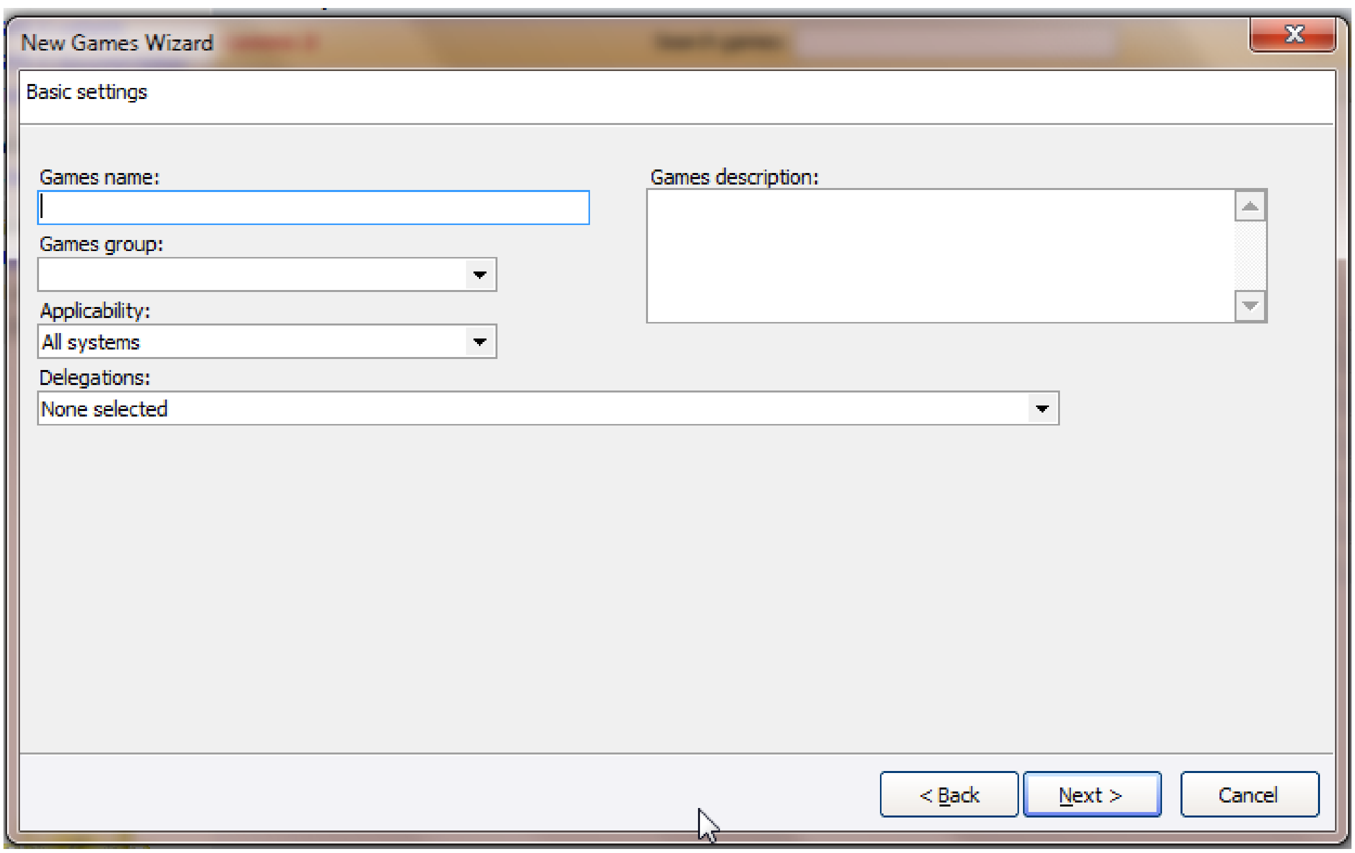
- A one-time event.
- A recurring event which happens every year.
- A long-term operation.

Create a New Games

The New Games Wizard creates a brand-new Games from scratch.

Getting started

Open the Games panel from the main GMS 6 screen. Right-click on the list of Games and select New Games Wizard. Go through the Wizard page-by-page, entering data as appropriate.



Basic settings - screen 2

Field name	Description
GAMES NAME	This short description of the Games appears on the list of Games and in many

reports.

GAMES DESCRIPTION — An optional detailed description of the Games.

GAMES GROUP — If you've defined one or more Games groups, you can filter and sort Games by the one selected here.

APPLICABILITY — GMS 6-only: Games will not appear in GMS.

GMS-only: Games will not appear in GMS 6.

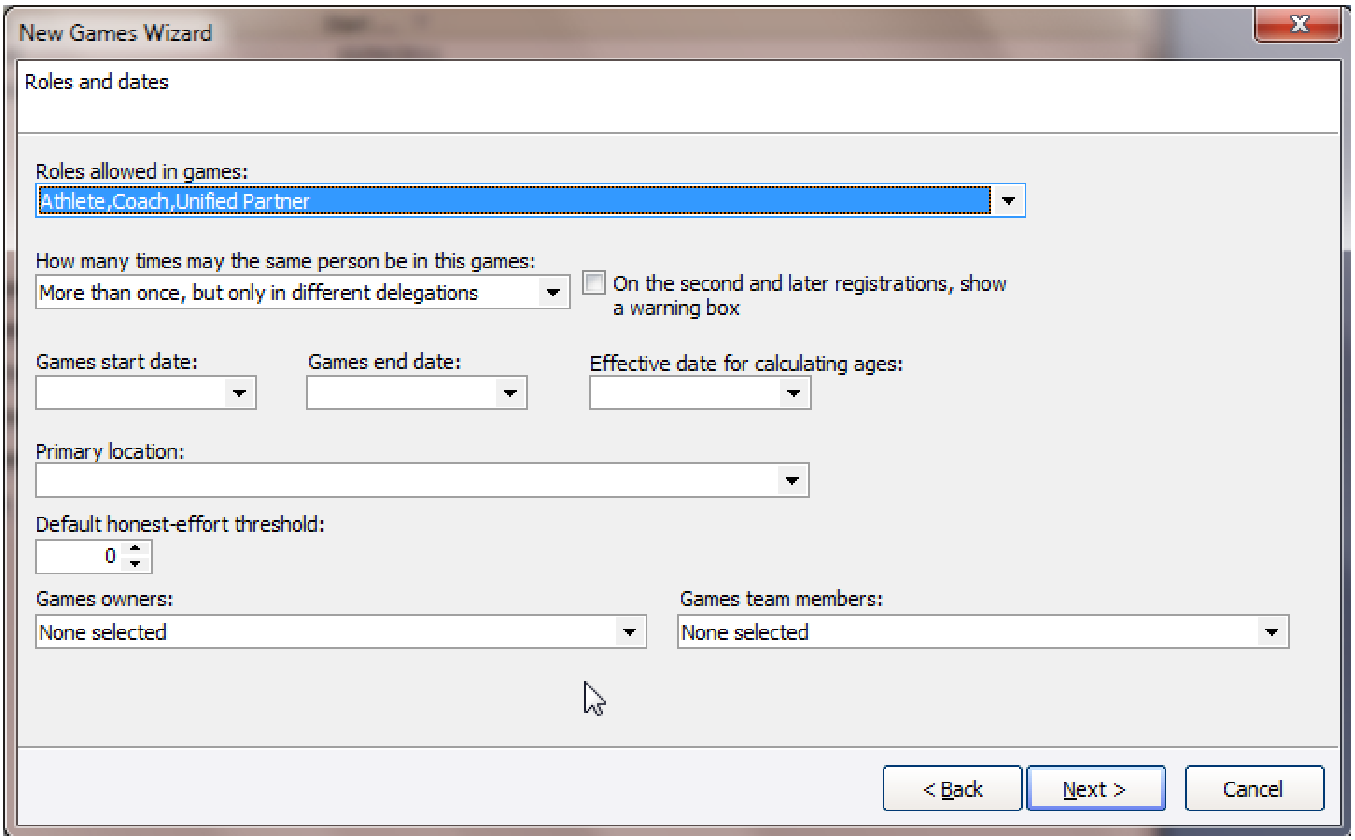
All systems: Games will appear in both GMS and GMS 6.

DELEGATIONS — Checking groups on this list creates those groups as delegations in the new Games.

Sports and Events - screen 3

SPORT AND EVENTS — Select the Sport(s) and Event(s) that will be offered in these Games.

Roles and Dates - screen 4



ROLES ALLOWED IN GAMES — One or more roles that people may play in this Games.

HOW MANY TIMES MAY THE SAME PERSON BE IN THIS GAMES — More than once but only in different delegations: a person can be registered in this Games any number of times as long as it's only once in each delegation

Only once: a person may only be registered in this Games only once.

ON A SECOND AND LATER REGISTRATIONS, SHOW A WARNING BOX — If More than once... is selected above, and you try to add a person to a Games a second time, a warning dialog will appear if this is checked.

GAMES START DATE — The first date of the Games or Competition

GAMES END DATE — The last date of the Games

EFFECTIVE DATE FOR CALCULATING AGES — So that entrant ages don't appear to change during the middle of a Games, all ages in the Games are calculated as of this date, no matter what the calendar date is.

PRIMARY LOCATION	The Location of the Games
DEFAULT HONEST EFFORT	This is the default value that will be used for calculating an Honest Effort Violation.

Addresses - screen 5

Assigns one or more addresses to the Games itself. This can be used in custom reports in the Games.

Games Setup

Concepts

After creating your Games, you can modify many aspects of its original setup.

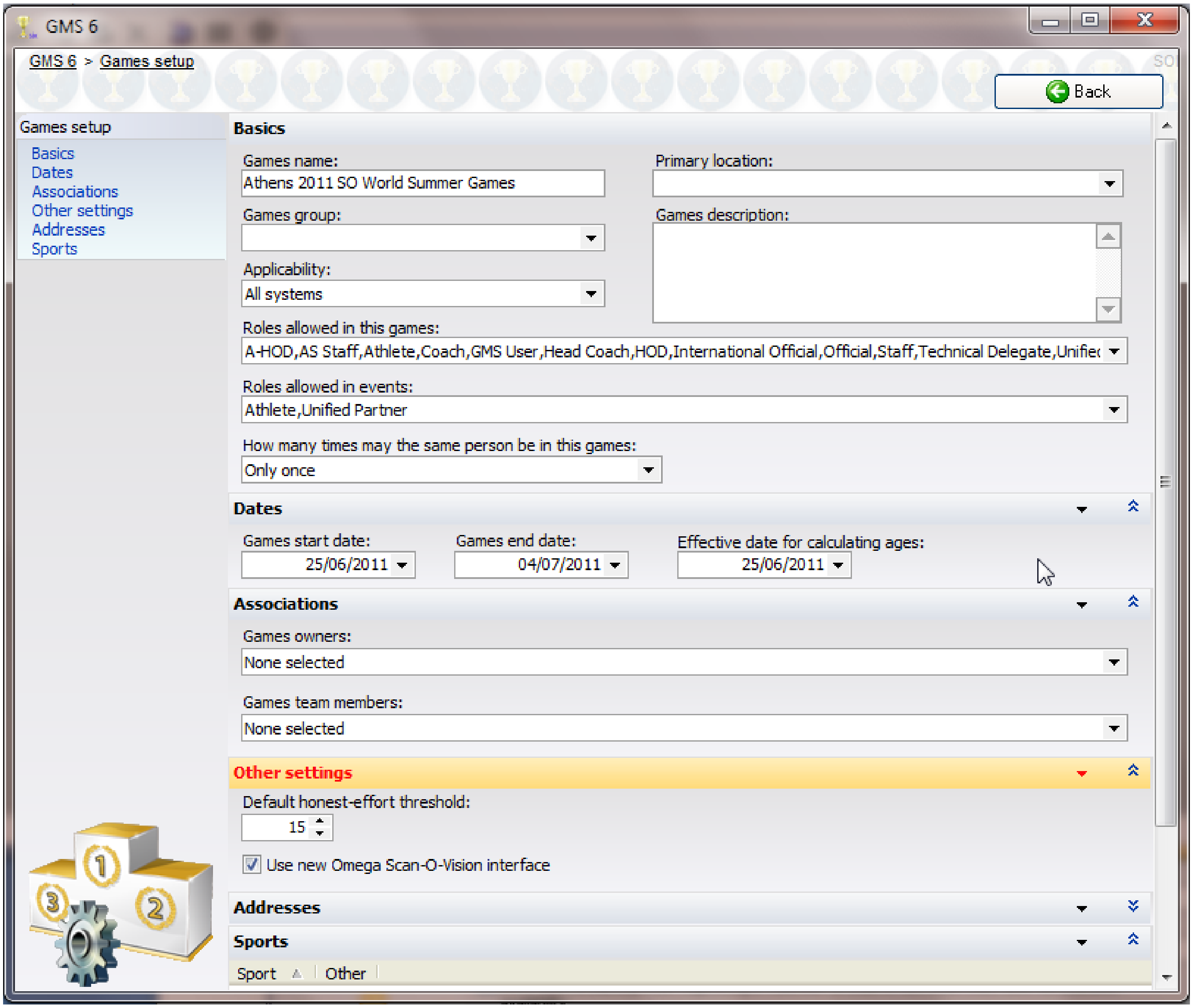
Some properties aren't set here, for example:

- Delegations are added, deleted and edited from the Delegations panel within the Games
- Sports and Events are edited from the Events groups link on the Setup panel in the Games
- Locations are edited from the Locations link on the Setup panel in the Games

General

Before you begin

Tell other users to exit the Games. GMS 6 cannot open the Game's setup when one or more other users have it open. Right-click on the Game's name from the **Games** panel on the **GMS 6 main** screen, then select **Setup** and then on **General**.



Basics panel

Field name	Description
GAMES NAME	This description of the Games appears on the list of Games and in many reports.
PRIMARY LOCATION	The base location for the Games. This is used when searching for Games.
GAMES GROUP	If you've defined one or more Games groups, you can filter and sort Games by the one selected here.
GAMES DESCRIPTION	An optional detailed description of the Games.
APPLICABILITY	**GMS 6-only**: Games will not appear in GMS. **GMS-only**: Games will not appear in . **All systems**: Games will appear in both GMS and GMS 6.

ROLES ALLOWED IN THIS GAMES	One or more roles that people may play in this Games. Note: eliminating a role here will not delete people from the Games who already have that role assigned.
HOW MANY TIMES MAY THE SAME PERSON BE IN THIS GAMES	More than once but only in different delegations. A person can be registered in this Games any number of times as long as it's only once in each delegation Only once a person may only be registered in this Games once.
ON A SECOND AND LATER REGISTRATIONS, SHOW A WARNING BOX	If More than once... is selected above, and you try to add a person to a Games a second time, a warning dialog will appear if this is checked.

Dates

GAMES START DATE	The nominal start date for the Games. This appears on reports and on the list of Games.
GAMES END DATE	The nominal end date for the Games. This appears on reports and on the list of Games.
EFFECTIVE DATE FOR CALCULATING AGES	So that entrant ages don't appear to change during the middle of a Games, all ages in the Games are calculated as of this date, no matter what the calendar date is.

Associations

These are the staff members associated with the Games. You can filter Games and their reports by owner and team member. The people who appear on these checklists are the ones defined as security users in GMS 6.

GAMES OWNERS	The primary owners of the Games.
GAMES TEAM MEMBERS	All users associated with the Games.

The Associations panel will only show if GMS ***Security*** (page 242) is enabled

Other settings

HONEST EFFORT	This is the Honest effort default setting for the Games.
TIMING SYSTEMS	This will indicates timing Systems being used for these Games.

Addresses

Assigns one or more addresses to the Games itself. This can be used in custom reports in the Games.

Games Custom Fields

Right-click on the Games\'s name from the Games panel on the GMS 6 main screen, click Setup and then on Custom fields to edit a Game's custom fields. Custom fields defined here are available only within this Games, which lets you have fields of the same name in different Games without confusion.

Click the Add new field link to open the New Custom Field Wizard.

Games Associations

Associations are used to give GMS users rights to a Games and control which Games show on each user's list of Games (Associations are only relevant when GMS Security is enabled.)

Right-click on the Games's name from the Games panel on the GMS 6 main screen, then select Setup and then on General.

GAMES OWNERS	Games owners automatically get full rights to the Games
GAMES TEAM MEMBERS	Team members get no special rights to the Games, but the Games will appear on the user's list of Games.

Registering People

Concepts

A person must first be registered before you can work with him in a Games or give him assignments. There are three primary ways of registering someone into a Games:

- The Registration Wizard, which walks you through adding a person. Get to this by selecting the Games and then clicking on Register people from the Data entry/registration panel.
- Choose the Delegations panel and right-click on the list of people in the Games and selecting Add, or from the Individual link under **Add Entrants** on the left side of the delegation list.
- Using a custom application form.

People can also be registered as a side-effect. When assigning people to job slots and the person you're assigning is not yet registered, GMS will let you immediately add the person to the Games right then and there.

Registration Wizard

The Registration Wizard walks you step-by-step through registering a person into a Games. The types of fields you're prompted for may vary depending on how you start the Registration Wizard. For example, if you told it to add a Individual while within a delegation, you won't be asked for the role or delegation.

Initial page - screen 1

SHOW CUSTOM FIELDS PAGE FOR EACH PERSON	If any custom fields are defined for people, GMS will show you the Custom fields page for each person as you go through the Wizard.

Options - screen 2

DELEGATION TO RECEIVE THIS PERSON	When this person is added, indicates the delegation that he'll be added to.
ROLE OF THIS PERSON	The role the person will be given in the Games.
GENDER	Only when adding placeholder people, the gender of the placeholder person that's created.
PERSON IS AN ALTERNATE	An alternate is someone who may or may not be coming. This option is more commonly used in GMS than in GMS.

Select person - screen 3

Use the standard person lookup tool here to find the person you want to add, or create him from scratch.

Edit personal data - screen 4

Use the standard profile editor here to update the entrant's personal information.

Changes made here are not saved until you click **Finish** at the end of the wizard.

Person availability and assignments - screen 5

BIB #	A number assigned to a person. Again, this option is more commonly used in GMS than in GMS.
SPORT	Select the Sport that this person is entering into.
EVENT(S)	Use the drop down to select the even or just enter the event code.

Custom fields - screen 6

If you checked SHOW CUSTOM FIELDS PAGE FOR EACH PERSON on the first page, this page lets you edit any custom fields associated with this person. Remember there may be more than one tabbed screen of custom fields to edit.

Finish

Gives you a quick summary of the person being added.

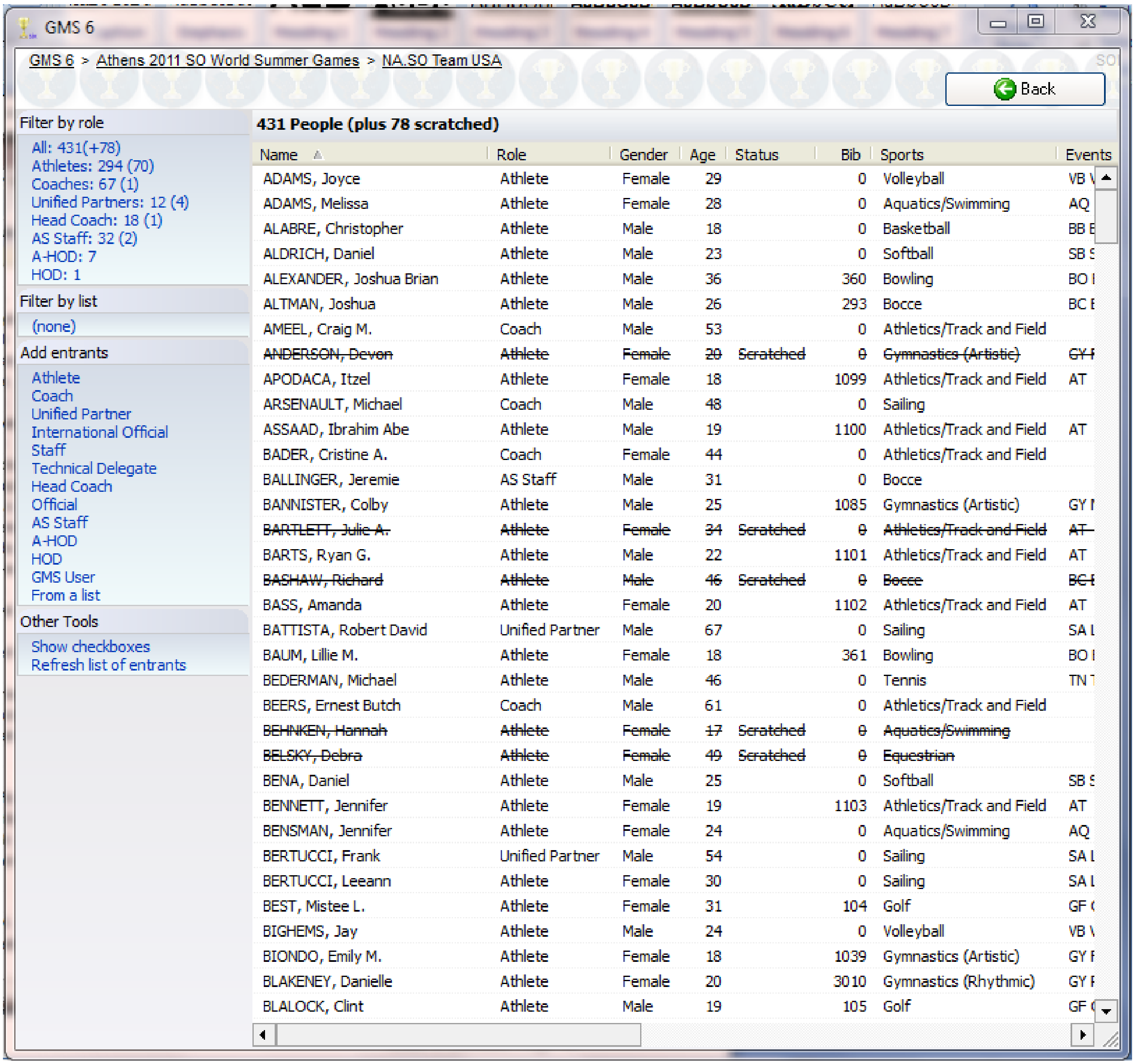
RUN THIS WIZARD AGAIN	If checked, after you click **Finish**, GMS will save the data you've entered and then start the Registration Wizard back again at the Find People page.

Working With People in a Games

Getting started

This section covers working with people who are already registered in a Games.

See lists of people in a Games by first opening a Games and then clicking on either See all people in a Games from the Data entry/registration panel, or by clicking on a delegation's name from the Delegations panel.



Name	Role	Gender	Age	Status	Bib	Sports	Events
ADAMS, Joyce	Athlete	Female	29		0	Volleyball	VB V
ADAMS, Melissa	Athlete	Female	28		0	Aquatics/Swimming	AQ
ALABRE, Christopher	Athlete	Male	18		0	Basketball	BB B
ALDRICH, Daniel	Athlete	Male	23		0	Softball	SB S
ALEXANDER, Joshua Brian	Athlete	Male	36		360	Bowling	BO I
ALTMAN, Joshua	Athlete	Male	26		293	Bocce	BC B
AMEEL, Craig M.	Coach	Male	53		0	Athletics/Track and Field	
~~ANDERSON, Devon~~	~~Athlete~~	~~Female~~	~~20~~	~~Scratched~~	~~0~~	~~Gymnastics (Artistic)~~	~~GY F~~
APODACA, Itzel	Athlete	Female	18		1099	Athletics/Track and Field	AT
ARSENAULT, Michael	Coach	Male	48		0	Sailing	
ASSAAD, Ibrahim Abe	Athlete	Male	19		1100	Athletics/Track and Field	AT
BADER, Cristine A.	Coach	Female	44		0	Athletics/Track and Field	
BALLINGER, Jeremie	AS Staff	Male	31		0	Bocce	
BANNISTER, Colby	Athlete	Male	25		1085	Gymnastics (Artistic)	GY I
~~BARTLETT, Julie A.~~	~~Athlete~~	~~Female~~	~~34~~	~~Scratched~~	~~0~~	~~Athletics/Track and Field~~	~~AT~~
BARTS, Ryan G.	Athlete	Male	22		1101	Athletics/Track and Field	AT
~~BASHAW, Richard~~	~~Athlete~~	~~Male~~	~~46~~	~~Scratched~~	~~0~~	~~Bocce~~	~~BC I~~
BASS, Amanda	Athlete	Female	20		1102	Athletics/Track and Field	AT
BATTISTA, Robert David	Unified Partner	Male	67		0	Sailing	SA L
BAUM, Lillie M.	Athlete	Female	18		361	Bowling	BO I
BEDERMAN, Michael	Athlete	Male	46		0	Tennis	TN T
BEERS, Ernest Butch	Coach	Male	61		0	Athletics/Track and Field	
~~BEHNKEN, Hannah~~	~~Athlete~~	~~Female~~	~~17~~	~~Scratched~~	~~0~~	~~Aquatics/Swimming~~	
~~BELSKY, Debra~~	~~Athlete~~	~~Female~~	~~49~~	~~Scratched~~	~~0~~	~~Equestrian~~	
BENA, Daniel	Athlete	Male	25		0	Softball	SB S
BENNETT, Jennifer	Athlete	Female	19		1103	Athletics/Track and Field	AT
BENSMAN, Jennifer	Athlete	Female	24		0	Aquatics/Swimming	AQ
BERTUCCI, Frank	Unified Partner	Male	54		0	Sailing	SA L
BERTUCCI, Leeann	Athlete	Female	30		0	Sailing	SA L
BEST, Mistee L.	Athlete	Female	31		104	Golf	GF (
BIGHEMS, Jay	Athlete	Male	24		0	Volleyball	VB V
BIONDO, Emily M.	Athlete	Female	18		1039	Gymnastics (Artistic)	GY F
BLAKENEY, Danielle	Athlete	Female	20		3010	Gymnastics (Rhythmic)	GY F
BLALOCK, Clint	Athlete	Male	19		105	Golf	GF (

Tip: Clicking on a column header, e.g. ROLE, will re-sort all of the people on the list by the value in that column.

Tip: Under **Filter by role**, each role shows next to it the number of people in the Games who have that role. If any scratched people have that role, that count shows in parenthesis, and scratched people don't show in the count.

Tools

On the left side of the screen.

Filter by role	Restricts the people who show here to those in a specific role.
Filter by list	Only shows on-screen the people who are also on a list that you select.
Add entrants	Shows the Registration Wizard to add new people to the Games with the role you specify.
Show/hide checkboxes	Shows or hides a checkbox next to every person on the list. Use these checkboxes to select multiple people at once for some operations.
Refresh list of entrants	Since multiple people can be working in a Games at the same time, and others may be making changes, click this link to reload the list of people from the database to see the most current list.

On the right-click menu

Right-click on a person to work with that individual or all selected people.

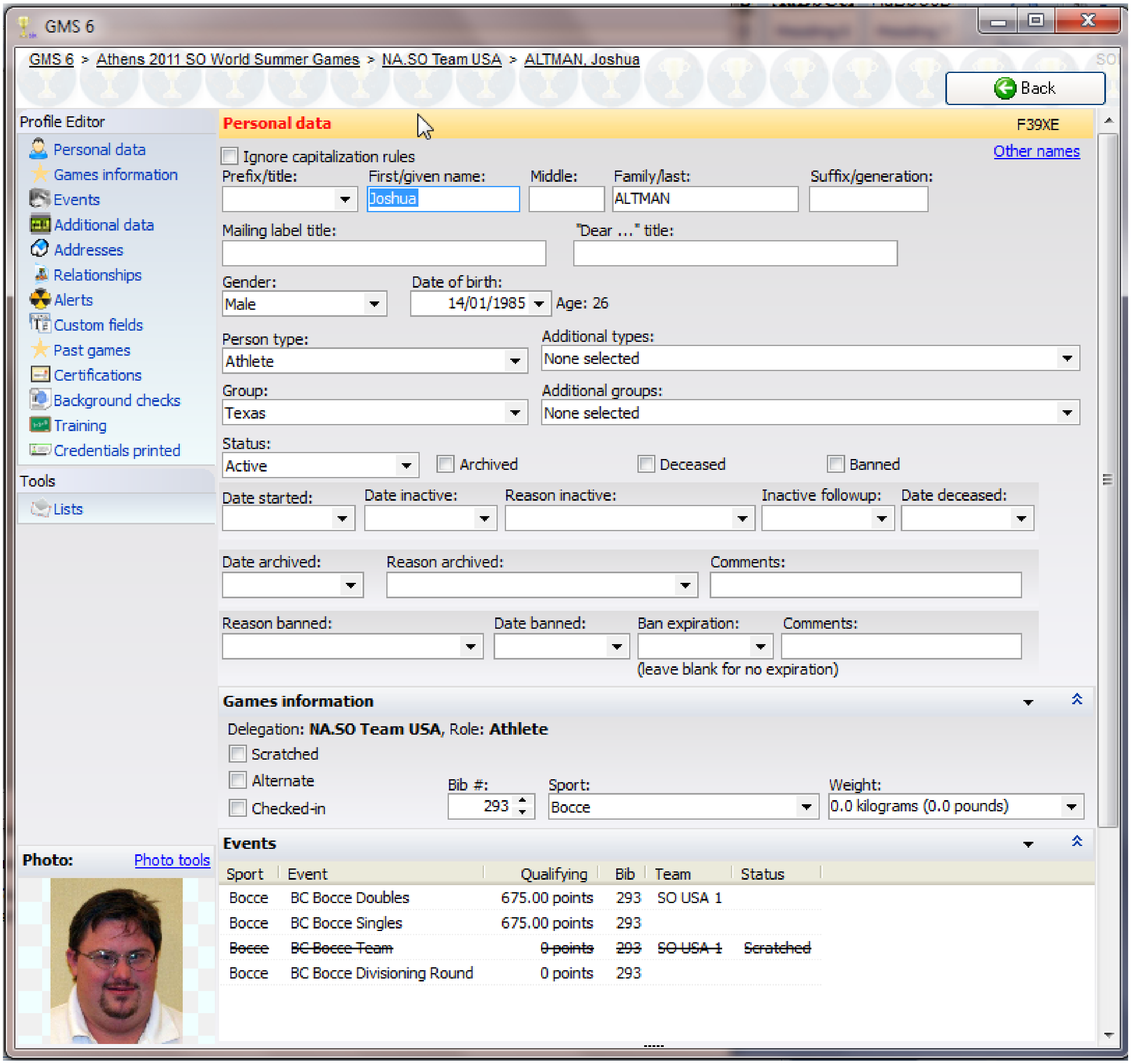
Add		Adds a new person to the Games using the Registration Wizard.
View		Opens this person in read-only mode.
Edit		Edits this person in the Profile Editor.
View calendar		Shows the person's schedule in a read-only monthly calendar view.
See tracked changes		Shows all changes made to this person. This is only visible if ***tracing*** (page 199) is enabled.
This entrant	Send a letter	Uses the mail merge engine to merge this person with the letter you select.
	Mark as checked-in	Marks this person as checked-in or not checked-in.
	Scratch	Scratches/un-scratches this person.
	Change to an alternate	Marks this person as an alternate or not alternate.
	Change delegation and/or role	Lets you move this person to another delegation, role, or both.
	Copy name and address to the clipboard	Copies the name and address of this person to the clipboard. This is handy for pasting into other documents.
	Delete	Deletes this person and his/her assignments and job preferences from the Games.
Comments and images		Pictures and comments for the selected person.
Selected entrants	Change delegation and/or role	Moves the selected people to another delegation, changes their roles, or both.
	Run a Report	Prints reports, either saved or built in.
	Mark as checked-in	Marks all selected people as checked-in.
	Mark as not checked-in	Marks all selected people as not checked-in.
	Scratch	Scratches all selected people.
	Un-scratch	Un-scratches all selected people.
	Set as alternate	Marks all selected people as alternates.

	Set as not alternate	Marks all selected people as not alternates.
	Delete	Deletes all selected people from the Games along with their assignments and job preferences. Note: this does not delete the people themselves from GMS.
	Add entrants to list	Adds the selected people to a list.
	Remove entrants from list	Removes the selected people from a list.
Select		Adds this individual person to a list.
Add to list		Removes this individual from a list.
Remove from list		

Games-specific Profile Editor Settings

This section covers the Game information panel which appears in the Profile Editor when a person is opened from within a Games. The profile editor (page 18) itself is described elsewhere.

Open a person by clicking on his name from within a delegation or from all of the people in a Games.



Field name	Description
SCRATCHED	A person who is scratched is known to have not shown up on-site, or is known not to be coming. This is the opposite of checked-in.
ALTERNATE	A person is an alternate in a Games when you've registered him as an "extra", to be used in case other registered people don't show.
CHECKED-IN	A person who is checked-in is known to have shown up on-site. Checked-in is the opposite of scratched. While someone who is scratched is registered but did not show (or who is known to not be coming), someone who is checked-in actually arrived.
BIB #	This option is more commonly used in GMS than in GMS.
GAMES INFORMATION	This is the Games specific information, including events for athletes and Unified partners.

Working With Delegations

Concepts

Delegations are the Games equivalent to groups. All people registered in a Games are in delegations, and delegations organize people together. When you created your Games, you made one or more delegations based on your groups.

If you have no need to break your people up into delegations, you can create and use a single delegation and name it something like "General", but you must have at least one delegation.

Getting started

See the list of delegations in your Games by opening the Delegations panel from within the Games.

On the right-click menu

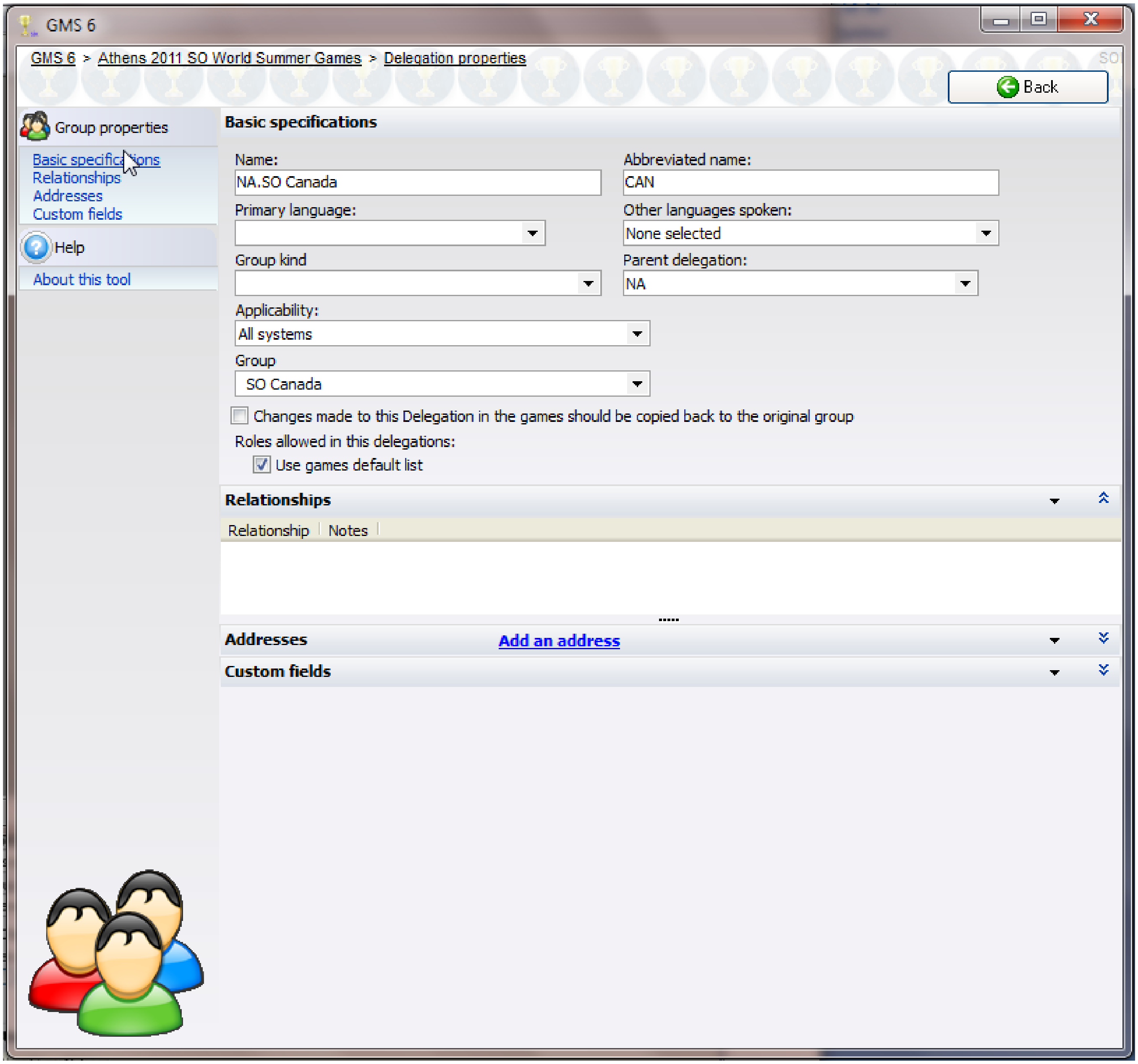
Add new delegation	Creates a new delegation in this Games.
View this delegation	Opens this delegation in read-only mode.
Edit this delegation	Opens the delegation to edit its entrants.
Properties	Opens the delegation to edit is properties.
Delete this delegation	Deletes this delegation and removes all people within it from the Games.
Comments and images	Adds and edits images and comments for the delegation itself.

Within the delegation

The delegation editor looks almost identical to the list of all people in a Games, and it works just the same. Add, remove and edit people here just as you do in *Working With People in a Games* (page 46).

Delegation Properties

Edit the delegation's attributes - name, languages, address, etc. - here.



Field name	Description
NAME	Group's full name.
ABBREVIATED NAME	This name is normally used on scoreboards in GMS, but can also be displayed in many custom reports.
PRIMARY LANGUAGE	The primary language spoken by the people in this group.
OTHER LANGUAGES SPOKEN	Any other languages commonly spoken by people in this group.
GROUP KIND	The type of group this represents.
PARENT DELEGATION	Use this to indicate a delegation is part of a larger delegation.
APPLICABILITY	Controls whether this group is shown in GMS 6 only, GMS only, or in both systems. Making a group inapplicable to either system does not remove it or make it inaccessible, it just suppresses it from some lists.

GROUP	The group that this delegation is based on.
CHANGES MADE TO THIS DELEGATION IN THE GAMES SHOULD BE COPIED BACK TO THE ORIGINAL GROUP	Within the Games, if the delegations name or other properties are changed and this box is checked, GMS will copy those changes back to the global group.
ROLES ALLOWED IN THIS DELEGATION	Only roles allowed in the Games can be selected. This value can be the same as the list of roles allowed in the Games or a limited set of them. Note: making a role not valid here will not remove people who are already registered with that role.

Relationships	Add	Add relationship to this delegation.
	Edit	Edit the relationship.
	View relative	View the record of the person in the relationship.
	Delete	
Addresses	The address of the delegation. This can be used in mailings.	

Create a New Delegation

From within a Games, open the Delegations panel. Right-click on the list of delegations and select Add new delegation, or click on the New Delegation Wizard link.

Field name	Description
GROUP	Selecting a group defines the new delegation based on that group.
NAME	This defaults to the name of the group the delegation is being based on, but can be changed. It is perfectly legal to have more than one delegation based on the same group.
CHANGES MADE TO THIS DELEGATION IN THE GAMES SHOULD BE COPIED BACK TO THE ORIGINAL GROUP	Within the Games, if the delegations name or other properties are changed and this box is checked, GMS will copy those changes back to the group itself.
APPLICABILITY	GMS 6-only, GMS-only or All systems, this defines where this delegation appears.
SELECT THE ROLES ALLOWED TO BE IN THIS DELEGATION	Only roles allowed in the Games can be selected. This value can be the same as the list of roles allowed in the Games or a limited set of them.
PRIMARY LANGUAGE	The primary language of the delegation.
OTHER LANGUAGES SPOKEN	Any additional languages of the delegation.

Click the **Finish** button to save the newly-created delegation.

Games Reports

In general, all of reports available within a Games are also available globally, and so are documented with the other reports. When run from within a Games they get filters on "Role" (as opposed to "Person type") and "Delegation" (vs. "Group"), but generally work the same.

Reports run from within a Games only include people registered in that Games.

Exceptions, People with Issues

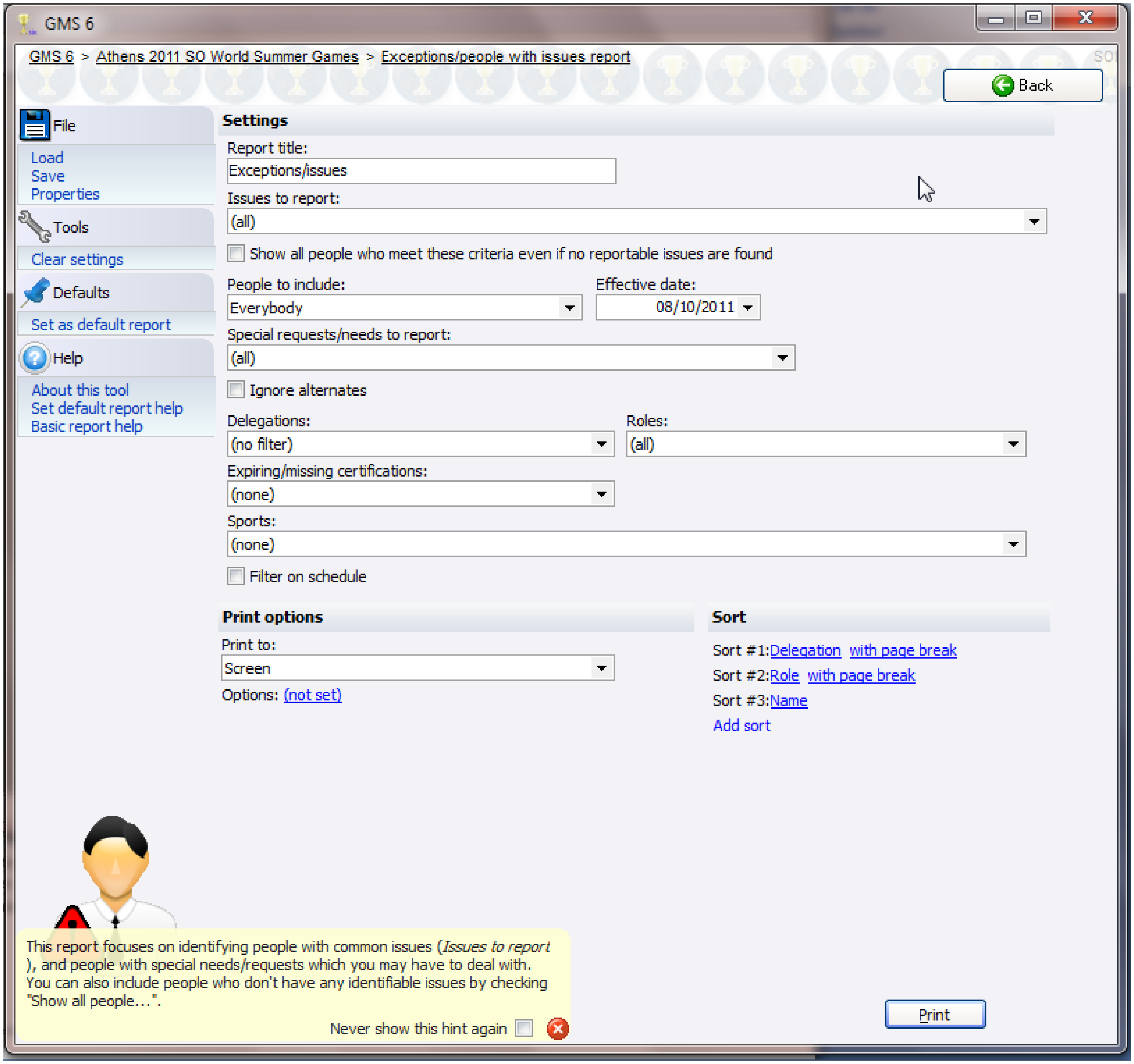
Exceptions reports within Games are used to find and show any number of issues with registered people. These are special reports, for which you can't use the report designer, but where you do have a lot of flexibility in what data appears.

Why would you run this report? Print this report to find people with assignment conflicts, missing information, missing or expired background checks, etc.

Steps in this task

Tip: The built-in report, which comes up automatically by default, is pretty good. Many of the options below are just that - options. If you just click the **Print** button, you may find that the report already meets all or most of your needs.

1. Click on the Exceptions, people with issues link from the Reports panel within a Games.



2. Choose the issues you want to print on the report from the ISSUES TO REPORT menu: Banned, Deceased, Inactive, No background check, Expired background check, Missing or expired certifications, Non-approved background check, Background check restrictions, Availability conflict, Assignment conflict, Job requirement conflict, Missing gender, Missing DOB, Wheelchair/requires handicap access, Medical alerts, Diet alerts, Special requests/needs, Missing passport and/or place of birth.
3. Check SHOW ALL PEOPLE WHO MEET THESE CRITERIA... if you want to include all people in the Games even if they don't have any issues.
4. Select which people to include: Everybody,
5. Enter the effective date for the report. This is the date that will be used when calculating expiring background checks.
6. Choose which special requests/needs are counted as issues.
7. Select the delegations and roles of people to be included.
8. Put in filters for assignments (if applicable) on their jobs, locations and dates.
9. Set your sort criteria.
10. Enter a report title.
11. Click **Print** to run the report.

Exceptions/issues

Adams, Christopher L	11/03/1948	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Assignment on 01/04/2011 10:00AM conflicts with assignment on 01/04/2011 09:00AM			
Alberts, Agnes J	10/14/1983	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Alvares, Camilla L	04/09/1954	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Amato, Stacie F	08/09/1961	Main Desk	Volunteer
Missing photo			
Anderson, Carolyn C	10/07/1953	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Ashby, Edna C	11/16/1960	General	Volunteer
Entrant is banned and not allowed to participate.			
Missing photo			
Entrant is marked inactive.			
Barnes, Darwin D	01/22/1958	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Bass, Steven S	08/26/1953	General	Volunteer
Missing photo			
Batchelor, Jackie J	10/18/1973	Main Desk	Volunteer
Missing photo			
Bell, Doug M	10/12/1950	General	Volunteer
Missing photo			
Entrant is deceased.			
Bell, Jim K	10/18/1985	General	Volunteer
Missing photo			
Benfer, Mark V	05/23/1951	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Berg, John C	12/12/1970	Main Desk	Volunteer
Missing photo			
Berg, Lilia D	02/05/1977	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Birmingham, Lucille S	12/03/1959	General	Volunteer
Missing photo			
Birmingham, Lucille S	12/03/1959	Main Desk	Volunteer
Missing photo			
Blount, Alicia D	02/01/1982	General	Volunteer
Missing photo			
Entrant is marked inactive.			
Boden, John O	04/26/1965	Main Desk	Volunteer
Missing photo			
Boisvert, Mary J	01/05/1946	Main Desk	Volunteer
Missing photo			
Boyd, Patricia D	09/01/1964	General	Volunteer
Missing photo			
Braun, Callie B	03/24/1984	General	Volunteer
Missing photo			

Duplicating a Games

Concepts

When running the same Games year after year, it's more convenient to duplicate an existing Games than to re-create the Games again from scratch. Duplicating a Games makes a copy of the Games and all of its settings, events, locations, custom fields and delegations. It does not re-register the same people as were registered in the original games: the new games starts out with no people in it.

Steps in this task

1. From the Games panel, right-click on the Games you want to duplicate.
2. Select Tools and then Duplicate from the menu.
3. Enter the name for the new Games. GMS will default the new name to "(copy of XXX)", then click OK. GMS will now make the new Games.
4. Edit the new Games's settings by right-clicking on it and selecting Setup then General. At a minimum, you'll need to set the dates and other basic properties of the Games to match this year's version.

Training

Concepts

Training is broken down into subjects and courses, with subjects being the topic of the training and courses being the trainings themselves on specific dates and locations. Training records - the records of people in various courses - can be used for filtering, mail merges, mailing labels, and are visible in the Profile Editor.

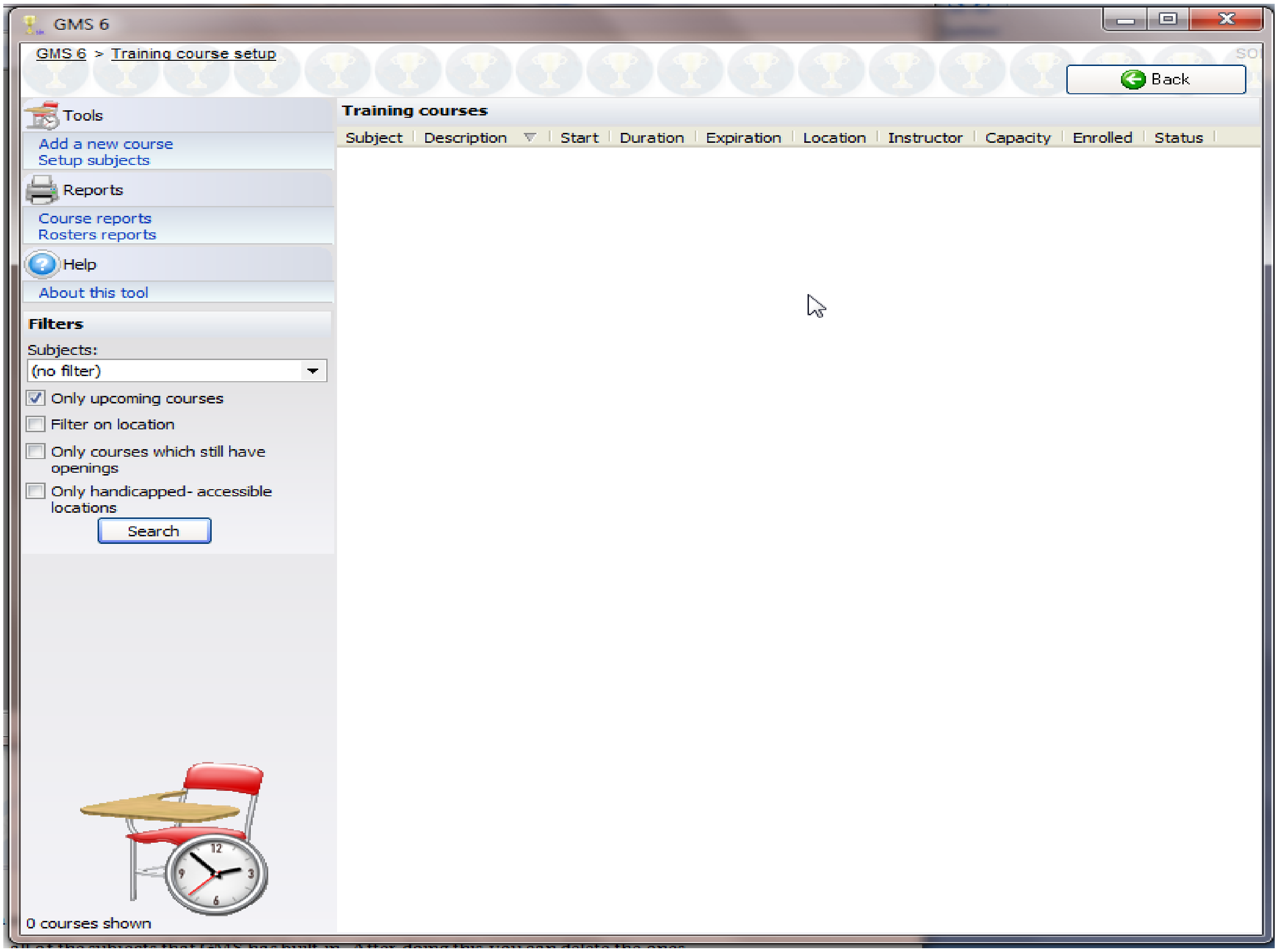
GMS even gives you the option of giving your Individuals automatic credit for Individual hours based on the time they spent in a training course.

Subjects

Training subjects are the high-level description of what's being taught in a course. For example, these are common subjects:

- Introduction to *our organization*
- CPR
- Protective Behaviors

When Subjects are later defined that require Individuals to have specific trainings, they'll require those trainings by subject. Set up subjects by clicking on the Training subjects link from the Setup panel.



Tools

Add a new subject	Creates a new subject.
Add built-in subjects	Brings in all of the subjects that GMS has built in. After doing this you can delete the ones you don't need.

On the right-click menu

Right-click on a subject on the list to modify its properties or perform other actions.

Add	Creates a new subject.
Edit	Edits the description and default validity period for this subject.
Merge with another subject	Merge together two subjects.
Delete	Deletes this subject.

You cannot delete any subjects for which there are one or more courses.

Caution: Changing a subject's default validity period does not change expiration date on the courses already created with this subject, but changing the description of the course does affect those already created courses.

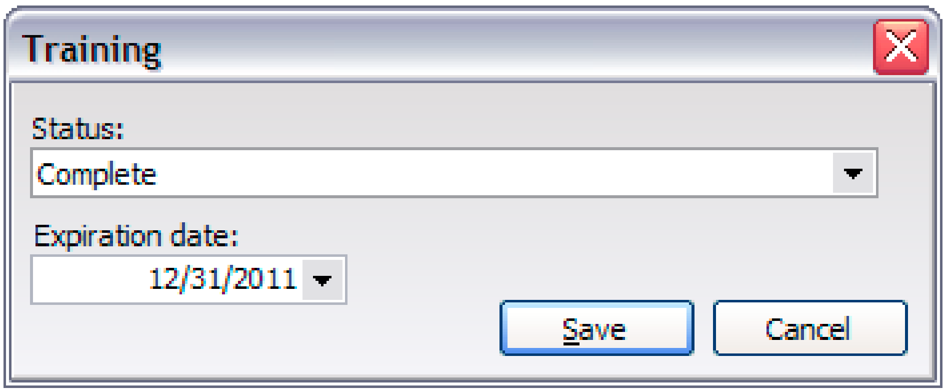
Training Records

Training records come in two kinds: those associated with a training course, and standalone records which are not connected to a training course. Both track the same information, but a record associated with a training course gets its date, duration, subject, and location from the course, and updating the course updates all of the training records in that course.

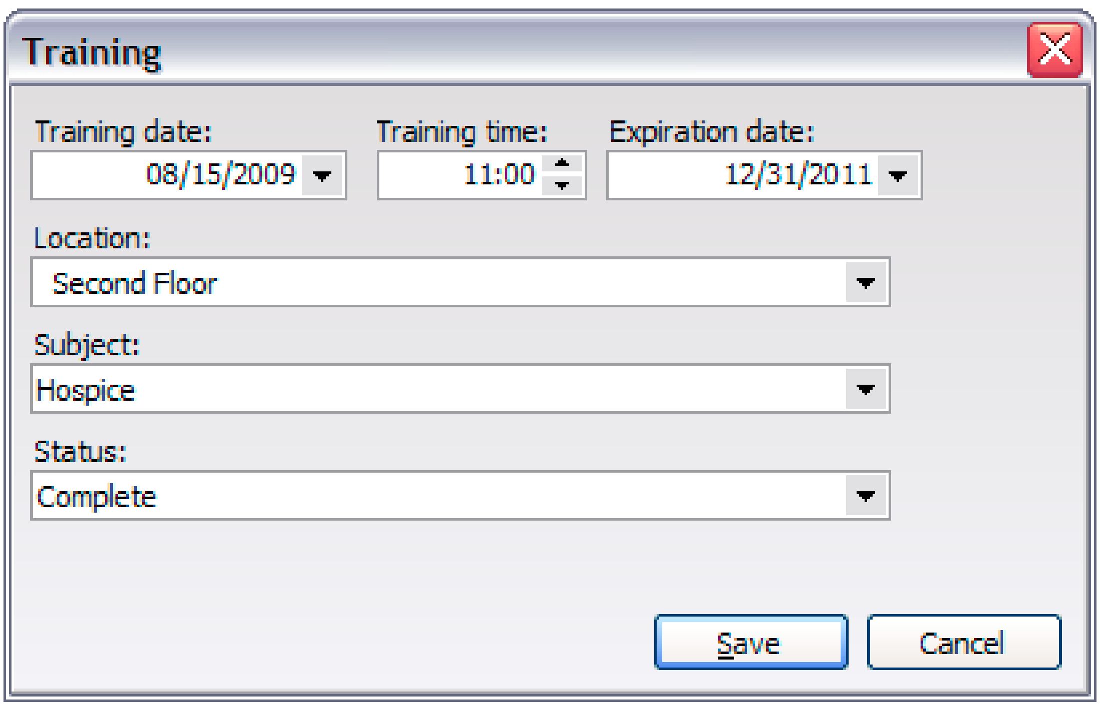
For example if you are offering a basic First Aid course, you would ***set up the course*** (page 233) and the training record would be completed for the Individual from completing the course. However if a Individual brought in a certificate of CPR certification from an outside class, you would create a training record not associated with a course to capture that information.

You can work with a person's training records from within their Profile Editor, the Training Manager (page 63) or from a course's list of entrants.

Training record in a course:



Training record not associated with a course:



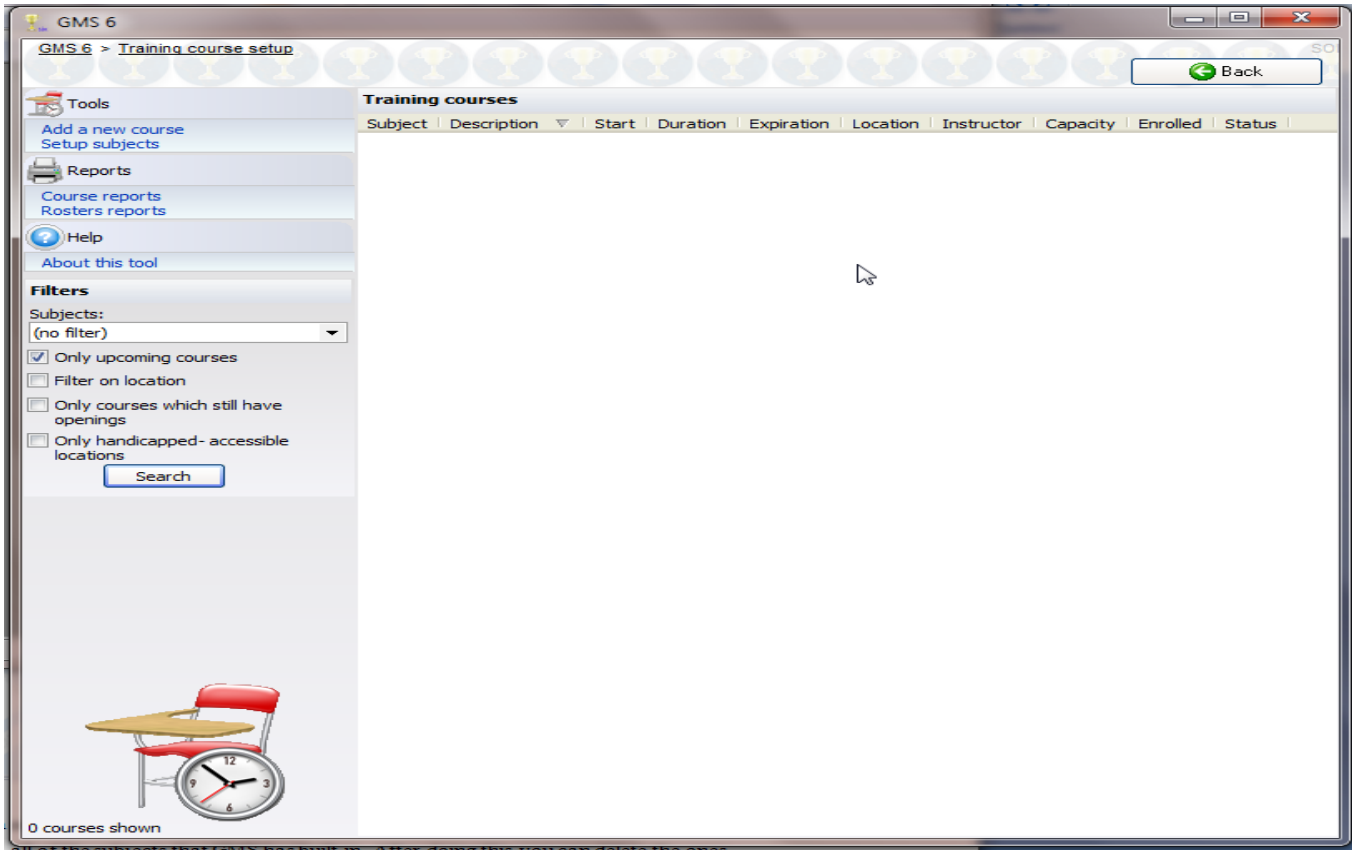
Concepts

Courses are actual classes teaching a specific subject. Courses are where you register students.

When to use this tool

- To track classes you offer to Individuals
- To track who is attending a specific training

Define training courses by clicking on Training courses on the Setup panel.



Tools

Add a new course	Defines a new course.
Setup subjects	Create, edit and delete training subjects. If you have any un-saved changes here, you'll be prompted to save them.
Course reports	Reports based on the courses, not their students, though students can be included in the reports.
Rosters report	Reports on the people in courses.

On the right-click menu

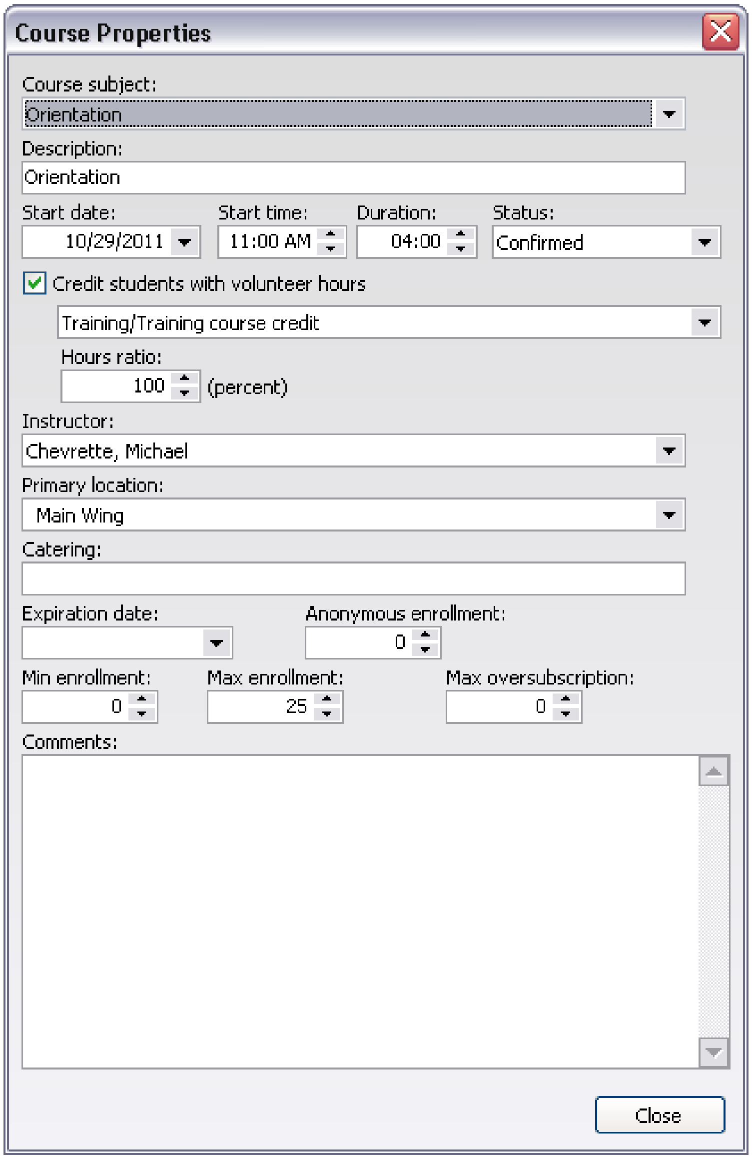
Right-click on a course on the list to modify individual courses or perform other actions.

Add	Define a new course.
Edit	Opens the course for editing.
Delete	Deletes this course. Deleting a course with students in it cause GMS to prompt you whether to delete all of the training records of those students in this course, or to disconnect them from the course and leave all of the training records intact.
See this course's registrants	Opens up the course entrants list with the course's students. There you can edit, add, and delete entrants in this course.

Filters

By default, all upcoming courses show on this list. Use the filters on the right to change those criteria and list past courses, those within a specific date range, by subject, handicapped accessibility, location or whether the course still has openings for more students.

Course Properties

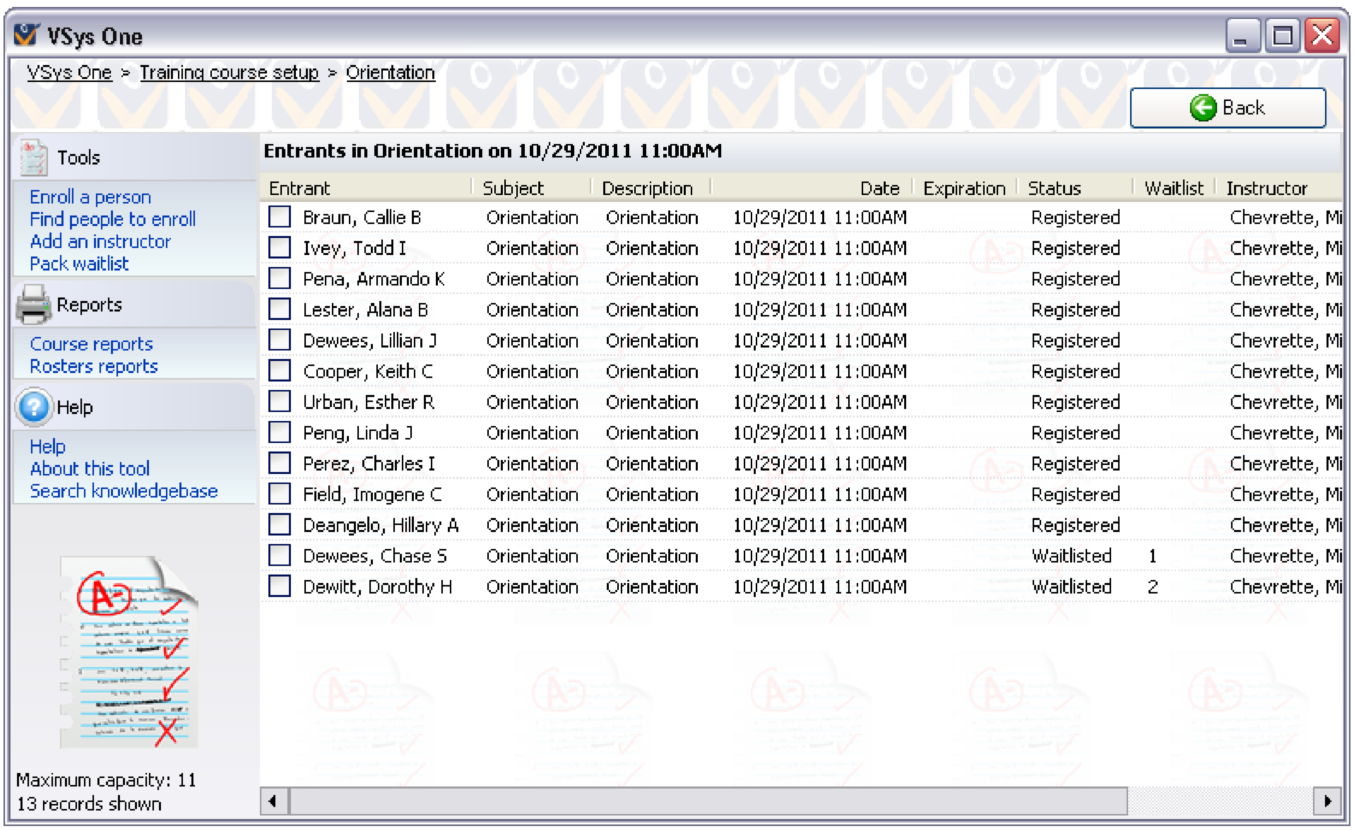


Field name	Description
COURSE SUBJECT	Select from course subjects you have already set up.
START DATE	
START TIME	
DURATION	
STATUS	This allows you to track the process of offering a class, such as track in interest in a potential class before offering it to your Individuals.
CREDIT STUDENTS	If checked, upon successfully completing this course, students will be credited with

WITH INDIVIDUAL HOURS	Individual hours based on the duration of the course. Select the job with which they'll be credited the hours (you may want to set up a special job just for this purpose) and the HOURS RATIO. Each Individual will get, as their hours, the duration of this course times the hours ratio / 100. For example, a three hour class with an hours ratio of 50% would net each student 1.5 Individual hours.
INSTRUCTOR	The drop-down gives you a list of all people used as instructors. Pick (add) to select another person as the instructor here.
PRIMARY LOCATION	
CATERING	Any text value, this appears on training reports.
EXPIRATION DATE	Students who successfully complete this course will have that training marked to expire on this date.
MAX ENROLLMENT	If you try to register more people than this in this course, GMS will warn you.
MIN ENROLLMENT	Use this to indicate how few people can register and the course will still run.
MAX OVERSUBSCRIPTIO N	If you expect that not all your participants will show, how many over do you want to accommodate.
COMMENTS	Any comments about this session

Course Entrants

See the entrants in a specific course by right-clicking on that course from the **Training course setup** tool and selecting **See the course's entrants**, or from the **Training courses and results** tool on the **User tools** panel.



Tools

Enroll a person	Shows the standard person lookup tool where you can choose a single person to add.
Find a person to enroll	Opens the advanced person lookup tool where you can specify your own criteria, then

	drag and drop one or more people onto the list of entrants here.
Pack waitlist	If you have too many people in you course, you can build a waitlist. After you have taken people off the waitlist and registered them in the course, "pack" the waitlist to renumber the list to take out empty spaces.
Course reports	Reports based on this specific course, not its students, though students can be included on the reports.
Rosters report	Reports on the people in this specific course.

On the right-click menu

Right-click on a person on the list to modify individual people or perform other actions.

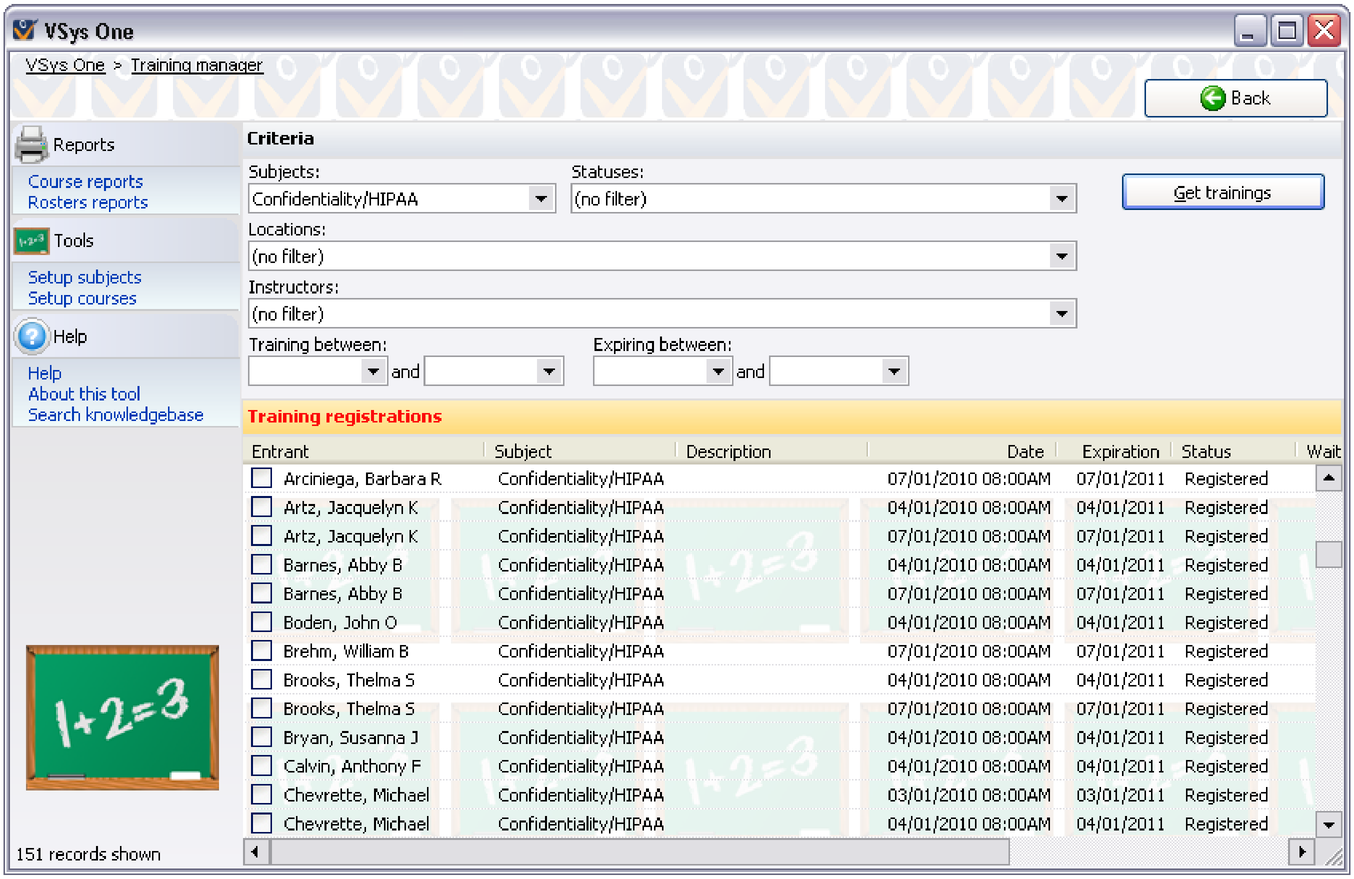
This training record	Edit record	Edits the training record itself.
	Delete	Deletes the training record.
	Edit entrant	Edits the person who's registered.
	Add to list/ Remove from list	Adds/removes this person from any normal or temporary list.
Enroll a person	Enter a person into this course	
Add an instructor	Add an instructor for the course.	
Select	All/None/Reverse, use these to check and un-check all records.	
Selected records	Set status	Sets the status of all checked records.
	Print mailing labels	Prints any of the built-in mailing labels for the checked people.
	Delete	Deletes all checked records.
	Un-delete	Un-deletes all checked records.
	Add entrants to list/Remove entrants from list	Adds/removes the selected people from any normal or temporary list.

Concepts

The training manager lets you search for people who have gone through or are registered for training courses. The people listed here can be in different courses on different days.

When to use this tool

- To send letters to or print mailing labels for people based on their training registrations
- Change the status of multiple training records at once across different courses
- Delete training registrations en masse



Finding training records

1. From the User tools panel open the Training manager.
2. Use the filters at the top to select which training records to display
3. Click on the **Get trainings** button. This will bring up all of the training records which meet your criteria.

On the right-click menu

Right-click on a person on the list to modify individual people or perform other actions.

This training record	Edit record	Edits the training record itself.
	Delete	Deletes the training record.
	Edit entrant	Edits the person who is registered.
	Add "person" to a list	Adds this person to a temporary or permanent list.
Enroll a person (outside of a course)	Brings up the person lookup tool to let you search for a person, then give the person a training record with whatever properties you want.	
Select	All/None/Reverse, use these to check and un-check all records.	

Selected training records	Set status	Sets the status of all checked records.
	Print mailing labels	Prints any of the built-in mailing labels for the checked people.
	Delete	Deletes all checked records.
	Un-delete	Un-deletes all checked records.

Reports

Report Concepts

All reports in GMS have some common elements:

- A way to load and save the settings which define the report
- One or more filters
- The Print options panel which lets you choose where the report will print to (screen, a PDF file, an HTML file, an Excel file, RTF file, e-mail or any one of your attached printers)

Mail merge, exports, and some other tools also share some of these elements.

Tools

If you run the same type of report regularly, or have custom designed the contents of the report, saving your settings lets you re-run the report again later without having to recreate the options you used. There are two places to save your settings: to GMS or to a disk file, which can be sent to someone else to use.

For some types of reports, GMS comes with one or more built-in settings which create reports that you can use right off the bat.

File	Load	Opens the saved report tool for loading any built-in or saved reports.
	Save	Saves the current report, including its design and filters, either to the database or to a file.
	Properties	Edits the report's name, keywords, grouping and comments.
Tools	Clear settings	Erases all of the settings you've made in this report.
	Design report	Opens the Report Designer to edit the underlying layout of the report. (Not available on all reports.)
	Calculated fields	A tool for creating your own fields based on built-in fields. These "calculated fields" can use arithmetic, string formatting, replacing and other methods. (Not available on all reports.)
	Detail filtering/sorting	Provides methods for editing detail records on a report, for example which training records appear and in what order when running a report based on people, but which includes a person's trainings.
Defaults	Set as default report	Makes the current report the "default" report, meaning that when this report tool is opened, the selected saved report will come up automatically.
	Remove default settings	If a default report has been set, clicking this removes that setting.

Tip: Report settings saved within a Games only show on the Load link within that same Games.

Saving and loading reports saves and loads the *settings* for the report, not the report's *contents*. This is an important distinction. To send the contents of the report (what you see when you print it) to someone else, print the report to a PDF file and send that PDF file.

Designing

Some reports let you modify their contents visually, adding and removing fields, re-arranging contents, and setting headers and footers. Clicking on the Design report link, if present, brings this tool up.

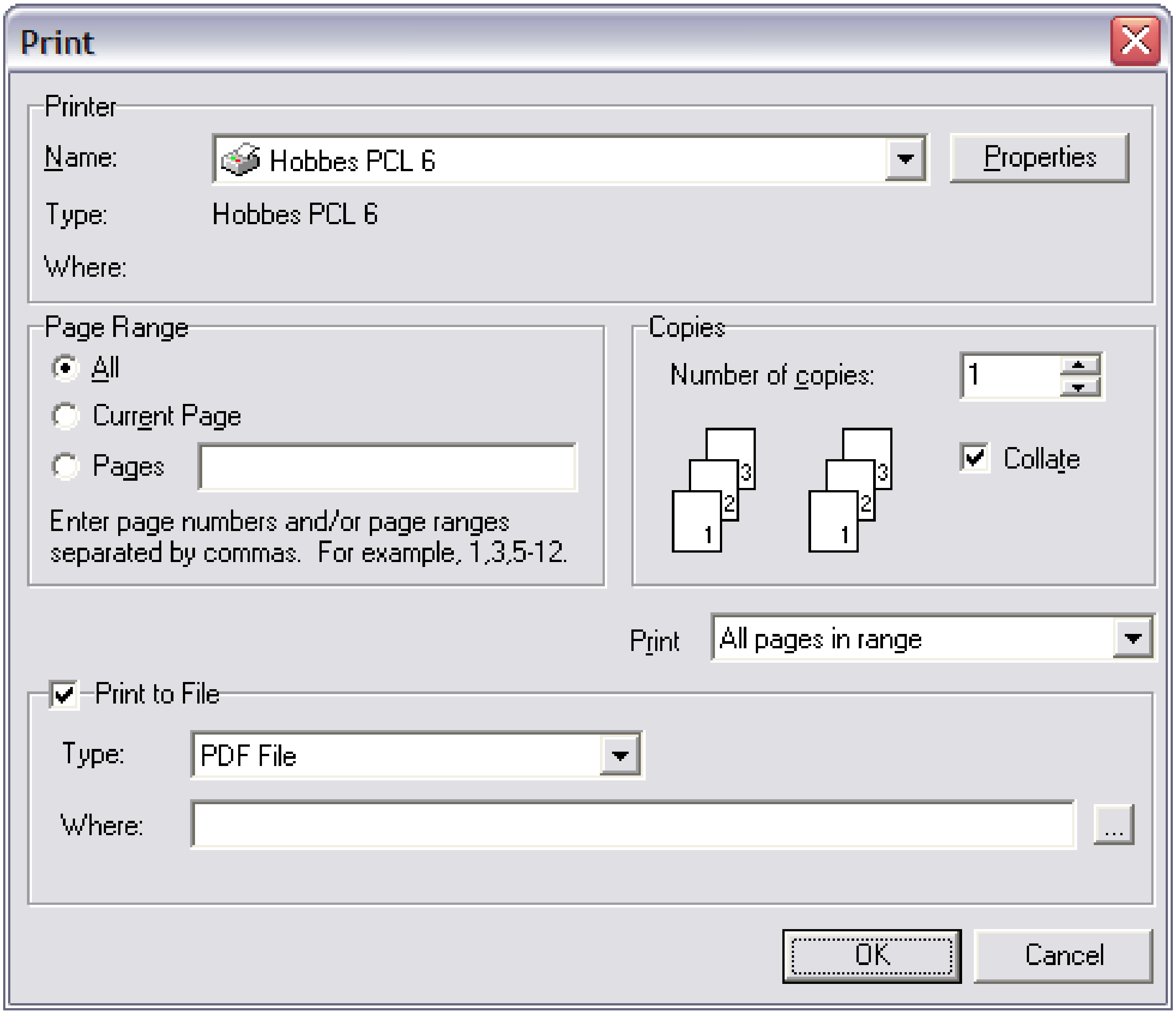
Print Options

Print your report to any of the printers attached to your machine, or any of these special devices:

- The screen. Use this for print previews or to adjust designs and filters.
- An Adobe Acrobat® PDF File. These are an accurate representation of what would have been printed, but in a file which you can then send to someone via e-mail for them to view or print themselves.
- An HTML File. Use this to post the report to the Internet for viewing in a browser (produces one or more HTML files). It will not look the same there as it does in a PDF file or on-screen.
- A Microsoft Excel® File. You can edit this file, and use it to cut & paste into other applications. It will not look the same there as it does in a PDF file or on-screen.
- Image Files/Image Files (color). Use this to create a picture of the report. It creates a .PNG file which can be used in graphics editing programs and inserted into word processing documents as a picture. This will also allow you export ***name tag/credentials*** (page 168) as images to be printed outside of GMS.
- An RTF File. Rich text files are an editable version of the report. RTF will maintain most of the formatting of the report, but can be opened with most word processors. Use this when the report has the content you want, but you need to change the format or presentation.
- PDF for e-mail. This option creates a PDF but instead of prompting you for how you want to save it, it automatically saves a temporary copy. You are then prompted:

Open and view this file	This will open the report in a window to view with the usual print/save buttons.
E-mail this file	This will open a message in your default e-mail client with the report as an attachment in the message. You can then send it.
Delete this file	Deletes the file.

When printing to any of the special devices other than the screen or PDF for e-mail, GMS will prompt you for a file to save the resulting report. Enter the file that you want to create in the box near the bottom labeled WHERE.



None of these special formats require that any other programs be installed; e.g. you don't need Adobe Acrobat® installed to make a PDF file or Microsoft Office® to make an Excel file.

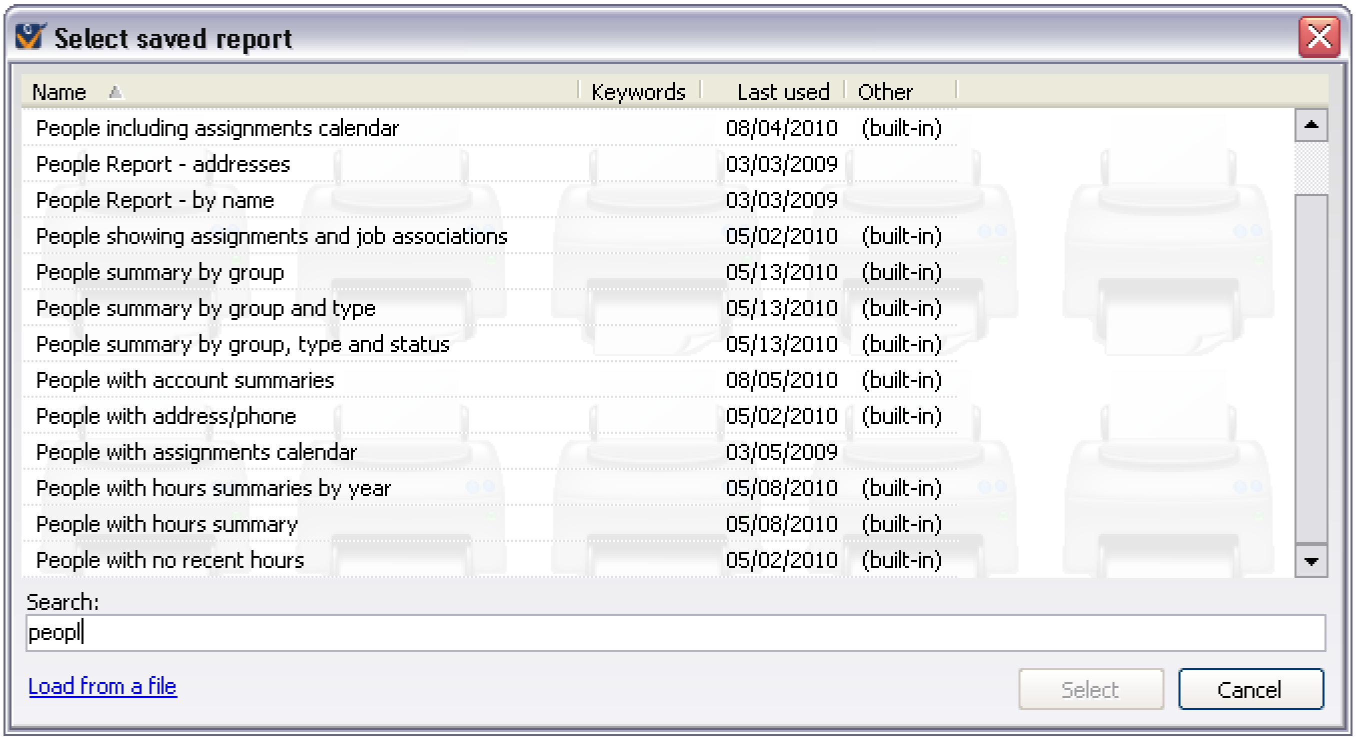
Built-in Reports

Report	Description	Variants
Advanced/ custom (global)	Games summary, Games summary with counts, Save the date, Thank-you list, Meal cards, Birthday listing, E-mail list, Kiosk user IDs	
Advanced/ custom (Games)	Delegation summaries, Entrant photos, Phone list (Games), Games people report, Games people report with assignments calendar, Games people sign-in list	
Banned people	All people marked as "banned".	
Basic mailing labels	Simple mailing labels for 100s of different types of labels. Letters panel.	
Comments	Details about comments attached to people	Comments, Comments with images

Configuration	System settings, including groups, options, etc.	
Custom column	A simplified version of custom reports where you can drag-and-drop fields to be included without having to use the report designer.	Account records, Assignment crediting details, Assignments for next 30 days, Awards given, Hours in past 30 days, Job assignments and associations, Job associations, Kiosk user IDs, Recent transactions, Recurring assignments ending in the next 30 days, Trainings, Individuals with DOB, kiosk and e-mail
Custom mailing labels	Labels that end-users can redefine. Letters panel.	5160, 5160 with bar code, 5162, 5162 with bar code, 5163, 5163 with bar code
Demographics	Summarize people by most values, including custom fields.	
Directory listing	Listing to make a directory in an RTF format.	
Exceptions, people with issues	People who have one or more problems which might either restrict their Individualing or need special attention.	
Expiring Certifications	List of people with certifications due to expire, of given type and date range.	
Invalid Addresses	Shows all people in system with an invalid address.	
Name tags, badges and credentials	Used to print identifying passes for Individuals. When saved, these remain associated with each Individual.	4-up credentials, 5095 name badges, 5095 name badges with assignments, 5160 bar code label, 5383 "My name is" name tags, 5384 credentials with assignments
People	Details and summaries about people in the system.	Lengths of service by type and group, Lengths of service by Individual type, People, People just a list of names, People including assignments calendar, People summary by group, People summary by group and type, People summary by type, group and status, People with address/phone, People with hours summaries by year, People with hours summary, People with no recent hours, Team details by group, Team summary by group, Termination details
Phone list	Contact information for Individuals.	

Loading Reports

When you open many report screens you will be given a list of built-in and saved reports to select from.

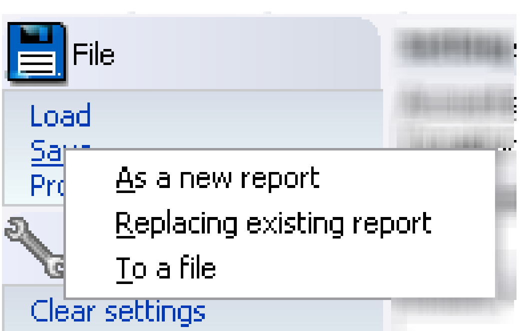


Type in a description of the report or any keywords into the SEARCH field and GMS will show the reports which match those search terms. Double-click on any report to use it or click on the **Select** button. Click on Load from a file to load a saved report which was sent by e-mail or that is saved on a disk somewhere. If available, clicking on a report here will show a preview sample image of the report.

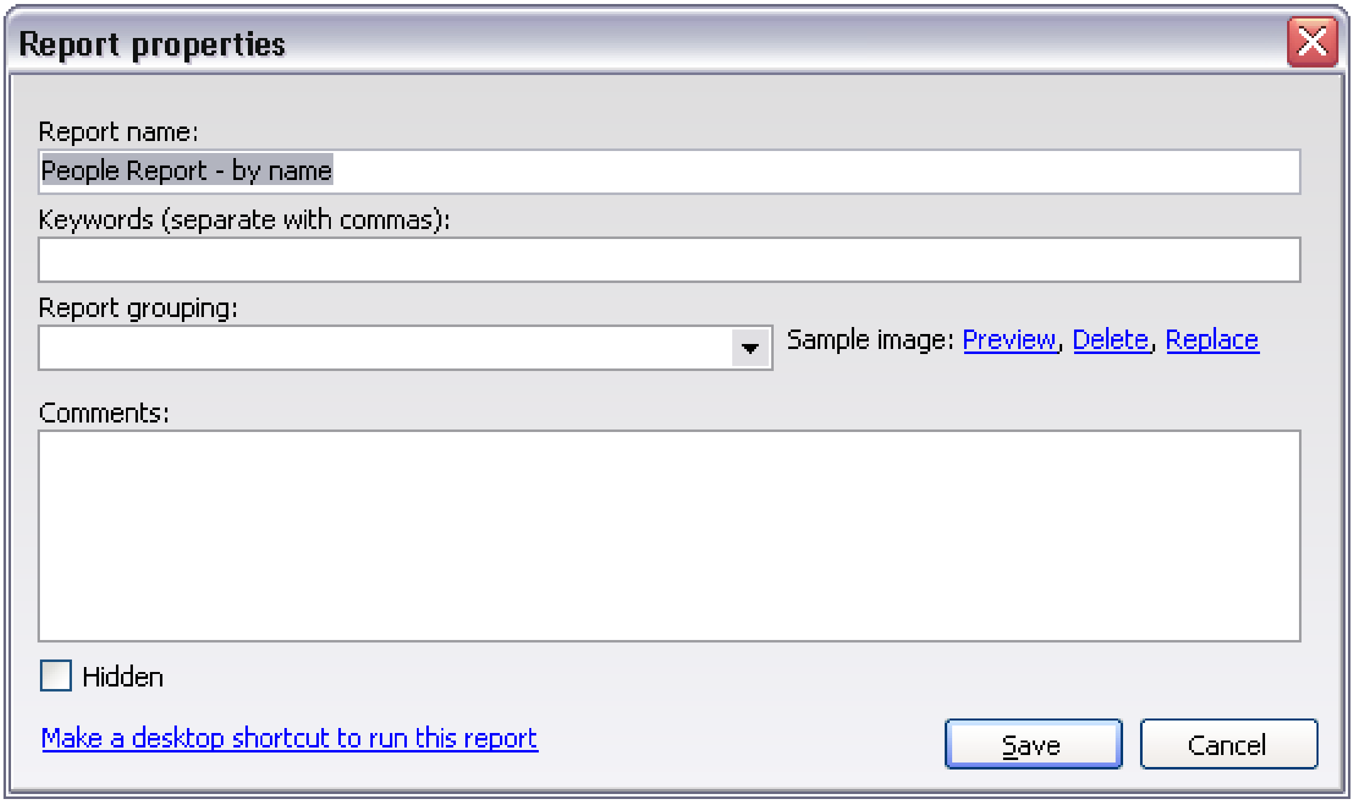
Tip: To see the reports that you have most recently used at the top of the list, click the LAST USED column heading to sort them by date used.

Saving Reports

Click on the Save link in the upper-left side of the screen to save the current report, with its settings and filters. This saves the settings and rules for the report, not what you see on the screen today. If you want to save the report as it is run (what you see on the screen) print it to a PDF file and save that file to your computer.



As a new report	Saves the report as a new one in the database.
Replacing existing report	If this report has already been saved, replaces the saved settings with these new settings.
To a file	Saves the report and its settings to a disk file with a `.xml` extension.



REPORT NAME	A description of the report, will print at the top of most reports.
KEYWORDS	(optional) Any number of words which you can use later to search for saved reports.
REPORT OWNER	
OTHER OWNERS	
GROUPING	(optional) Type in a value here to make GMS show this report under a "parent". Use the same grouping to tie multiple reports together for easy use later.
COMMENTS	(optional) Your own comments about the report, including possibly why you'd use it and when or the rationale behind its creation and setting. GMS itself doesn't use the value here.
HIDDEN	Hidden reports don't show on the right-click popup menu for people, and by default don't show on lists of reports for loading.
SAMPLE IMAGE	(optional) This allows you to select and set an image of the report. This can be useful to be able to see a sample of the report without actually running it.
Make a desktop shortcut to run this report	Place a shortcut on your desktop for frequently run reports. Double-clicking on this icon will run this report to a PDF file.

Detail Filtering/Sorting

Concepts

Some detail portions of reports in GMS can be filtered and sorted in custom reports. These filters/sorts apply to the detail pipelines/bands of the report rather than the primary records. For example, let's take a report based on people where you're including all of each person's upcoming trainings. The report settings will filter the people, by perhaps groups or in alphabetical order depending on how you have set it up. The detail filters let you filter and sort the training sessions - the details about the person. The detail filtering and/or sorting is separate from the report sorting.

The details which can be filtered or sorted on show as tabs along the top. For each, you can choose to filter or not (Use specific filters here or Don't filter XXX).

You also have the option of requiring that each person/record have one or more of these details. In the example above, REQUIRE ONE OR MORE TRAININGS is checked. Any person who meets the report's overall criteria but does not have a training will be excluded.

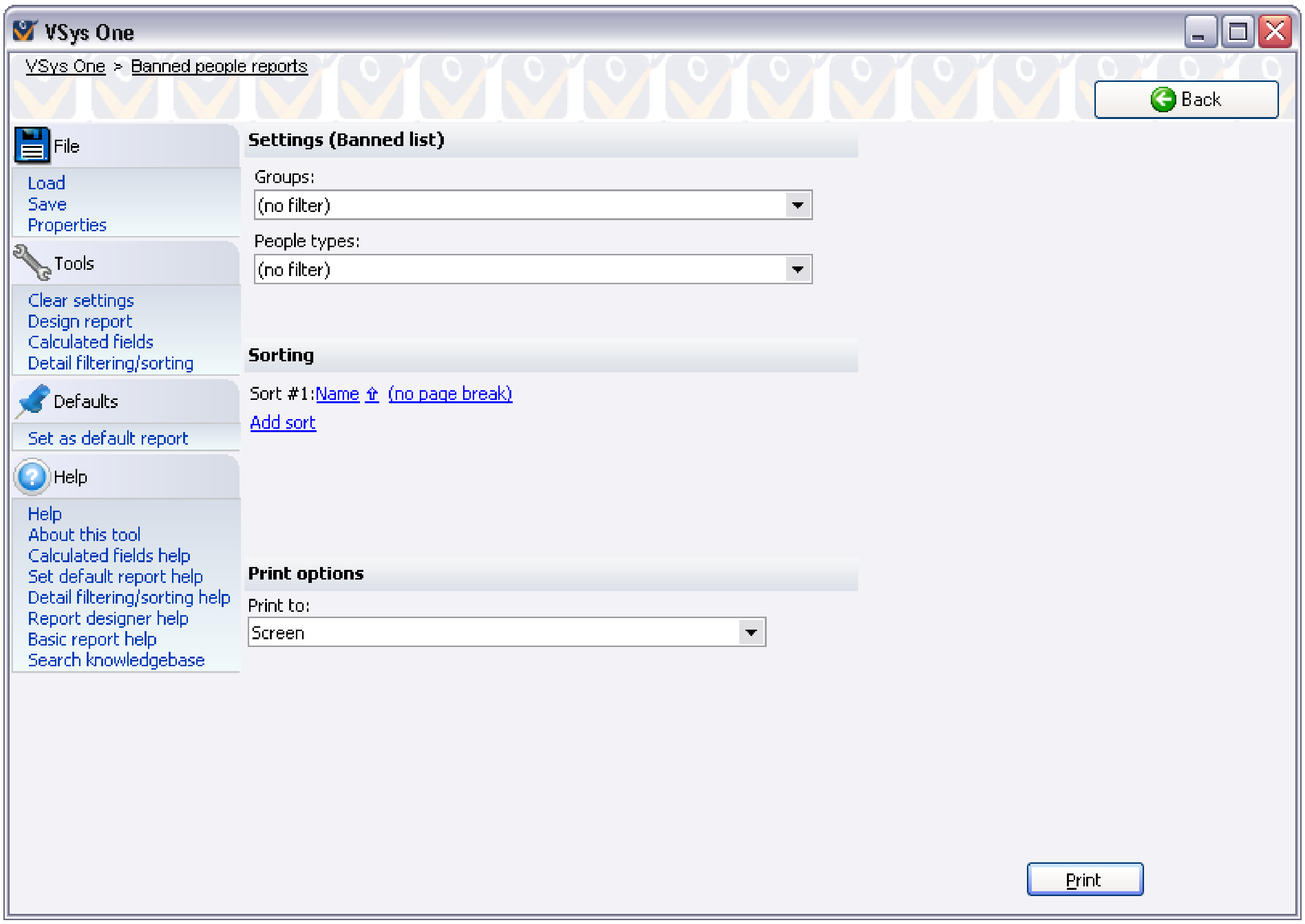
Whether or not the details are filtered, they can be sorted. For example, in that report which includes each training the Individual has, you can sort those trainings so that the most recent one comes first, the oldest the end.

These filters and sorts are saved with the report itself.

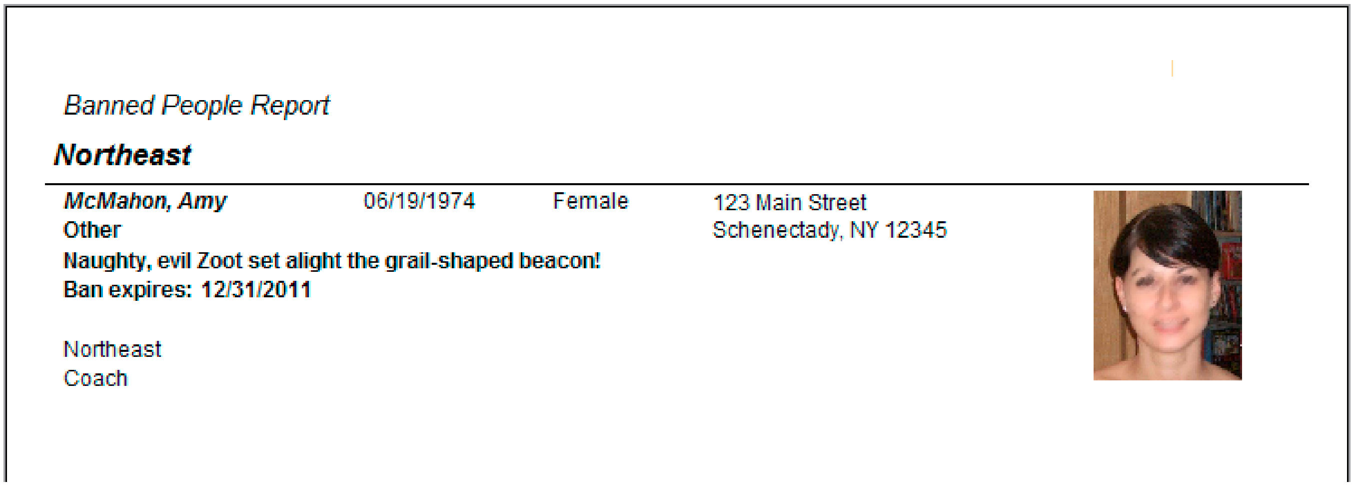
Banned People Reports

If you have a reasonably small number of banned Individuals, these are great for keeping at the reception area, security desk, or other places where you'll want to be on the lookout for unwelcome "help".

From the Applicant screening panel, choose Banned people report.



Sample report



Banned People Report

Northeast

McMahon, Amy 06/19/1974 Female 123 Main Street
Other Schenectady, NY 12345
Naughty, evil Zoot set alight the grail-shaped beacon!
Ban expires: 12/31/2011

Northeast
Coach

Basic Mailing Labels

Concepts

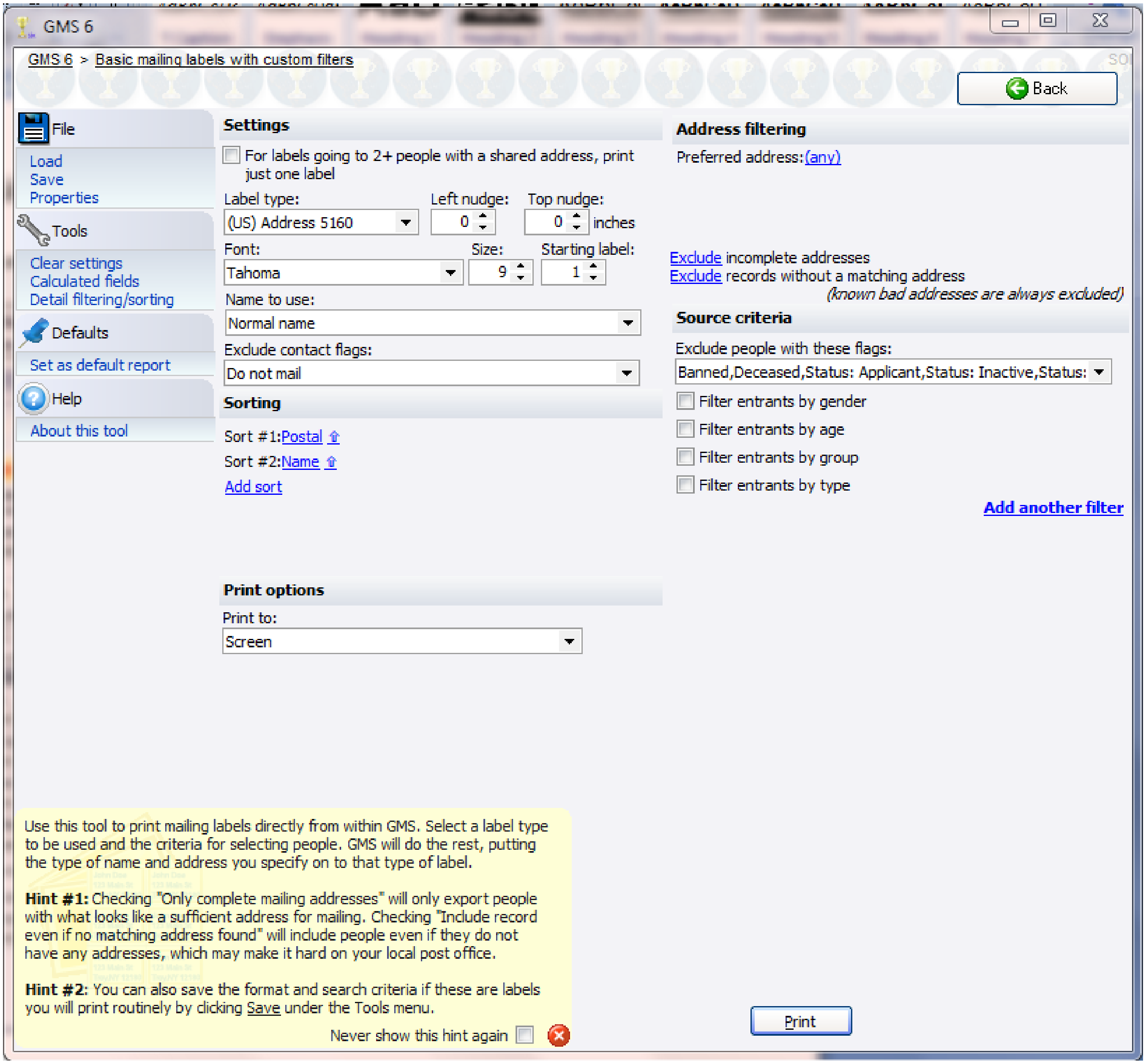
GMS has easy-to-use tools for printing mailing labels on standard label types, with just the recipients' names and addresses.

Printing Basic Mailing Labels

Getting started

From the **Letters, mail merges and mailing labels** panel on the **GMS main** screen or from within a Games, click on **Basic mailing labels**.

When printing labels from within a Games, if a person is registered in the Games more than once, he will have a label printed for every delegation that he's in.



Settings

People are only included in this export if they meet *all* of the criteria you specify.

FOR LABELS GOING TO 2+ PEOPLE...	If checked, and two or more people sharing an address are included here, only one label will be printed for all of the people sharing that address.
EXCLUDE CONTACT FLAGS	Excludes people with one or more of the selected contact flags. Use this to eliminate people who don't want to get this mailing or use this mode of communication.

GROUPS (DELEGATIONS within a Games)	Only people in these groups/delegations are included.
PEOPLE TYPES (ENTRANT ROLES within a Games)	Only people of these types (globally) or roles (in a Games) are included.
INDIVIDUAL TYPES	Filters by Individual type.
SCRATCHED PEOPLE (GAMES ONLY)	Only people not scratched, Only scratched people or (any).
ONLY PEOPLE ON ONE OR MORE LISTS	Check this to filter recipients to only people on one or more of the lists you check.
EXCLUDE PEOPLE WHO ARE	Filters to exclude people who are archived, banned, deceased, placeholders, applicant, inactive, leave of absence, prospect, rejected, special or terminated.

Address filtering

Choose which address types are preferred by setting an order here. Include (any) as the last fallback address type if you want the label to go to any valid address even if it's not the type selected here. Then include or exclude incomplete addresses (those missing one or more of an address line, city, state and zip/postal code), and whether people who don't have an applicable address should be excluded or included.

Label options

These define the type of label that will be used, and how the text on the label will be formatted, and what name will be used.

LABEL TYPE	Choose from any one of the 322 built-in label types. If GMS is set to use A4-sized paper, those will appear at the top of the list, otherwise US Letter-sized labels are at the top.
LEFT NUDGE, TOP NUDGE	All text printed on the labels will be moved this distance to the right/bottom. (Use negative values to move left/up.)
FONT, SIZE	Pick a font and size appropriate for your label.
STARTING LABEL #	GMS can skip labels to re-use a partial sheet of labels. Set this to the label to start. The label at the upper-left corner is considered the first label.
NAME TO USE	Normal name, Normal name with prefix and Alternate name are the options. The last tells GMS to use each person's alternate name, if available. If the alternate name is blank, GMS will use the person's normal name.

Sorting

Add one or more sort criteria to make GMS sort the labels. Labels will first be sorted by the topmost field, then the second field, then the third, and so on. The and arrows next to each field indicate that the field will be sorted ascending or descending, respectively. Checking (no page break) or with page break turns page breaks for this field on and off. You might use page breaks to separate labels by delegation or by role.

Printing labels

After setting your filters, label options and sorting options, pick the printer to send the labels or Screen. Click on the **Print** button.

Post Printed Letters

Once GMS has printed your labels, it shows the Mark as printed link. Use this tool to post "Letters printed" records for the people who were printed here. You would do that to keep track of who's received what mailings and when, both to filter on it later as well as to see when you've communicated with various people.

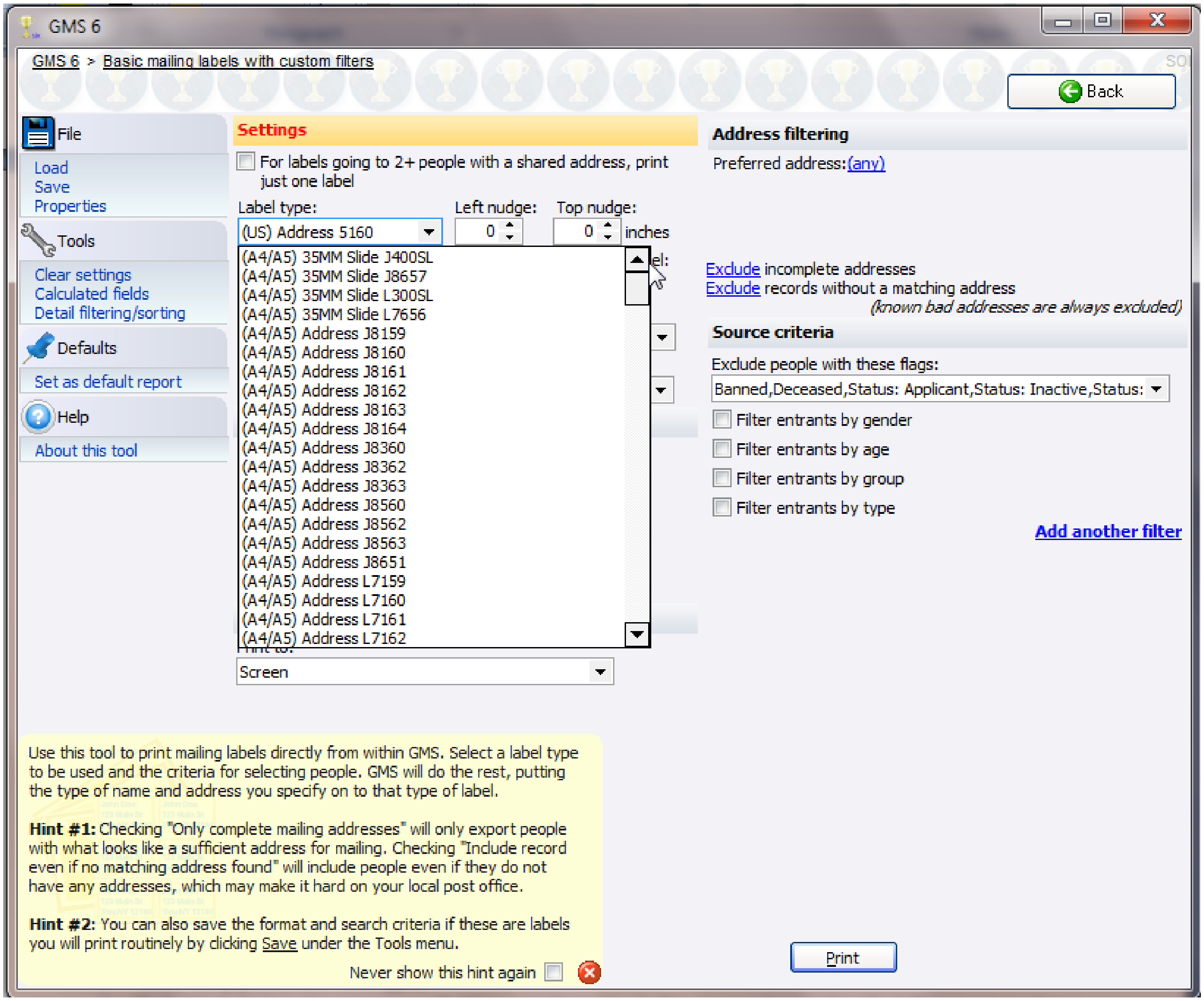
After clicking on the Mark as printed link, these are your options for the "letter printed" records that are added to each person who was printed.

Field name	Description
DESCRIPTION	A description of what is being mailed, e.g. "Summer 2007 Newsletter".
LETTER TYPE	The type of letter this represents, e.g. "Newsletter".

METHOD	How this is being sent, usually "Mail".
STATUS	The mailing's status, usually "Sent".
MERGED	When the mailing was printed, usually today's date.
MAILED	When the mailing will go out. You can mark it with today's date or the day you estimate that it will mail.

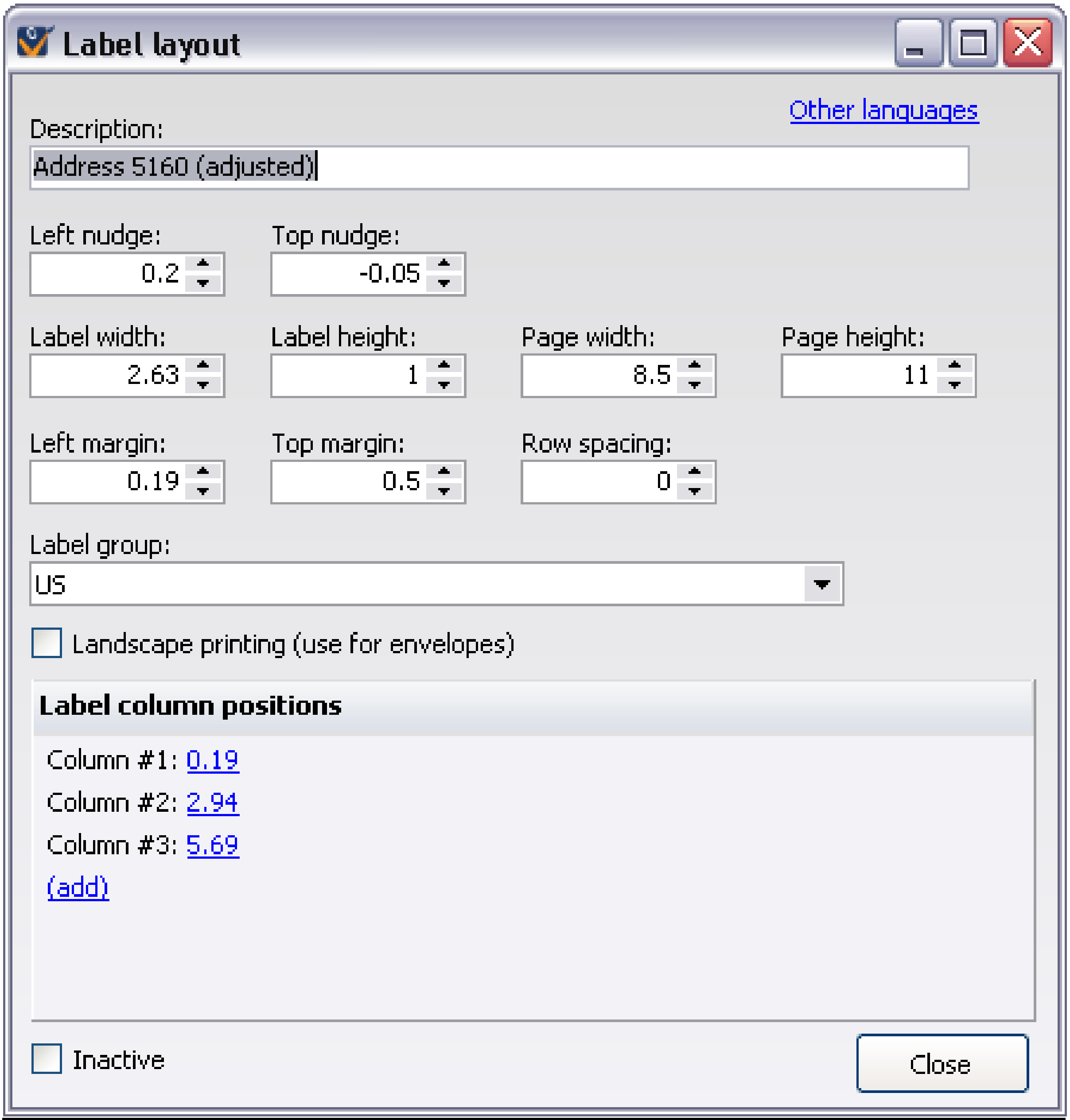
Label Types

While GMS has hundreds of built-in label types, you may still want to create your own.



Steps in this task

1. On the Setup panel, click Label types.
2. Find a label which is close to your needs. If it's grayed out, it's a built-in type and cannot be edited. But you can make a copy of it that you can modify by right-clicking on the label type and selecting Copy. If Edit is present on the popup menu, you can edit the label type directly.
3. Define the properties of your label, then click **Save**.



Label properties

Field name	Description

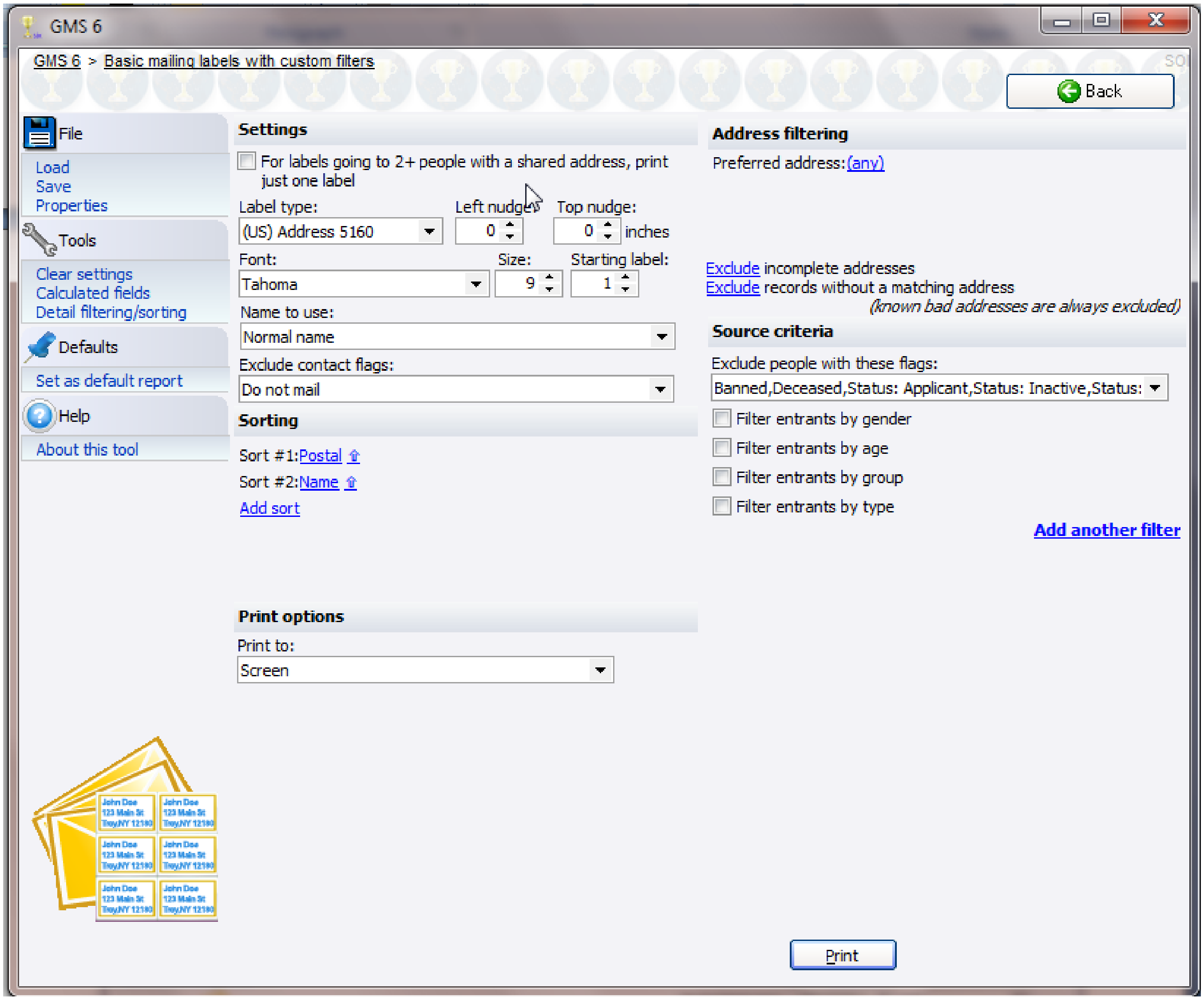
DESCRIPTION	A description of the label for your own use. GMS will let you have multiple types of labels with the same name. It won't get confused, but your staff will.
LEFT NUDGE, TOP NUDGE	When the label is printed, these values will be used to move all printed text right/left and down/up by that distance. Negative values are allowed, they move the text left/up, where positive values move it right/down.
LABEL WIDTH, LABEL HEIGHT	Size of each label.
PAGE WIDTH, PAGE HEIGHT	Size of the physical piece of paper of the label sheet.
LEFT MARGIN, TOP MARGIN	Position of the top left of the upper-left label.
ROW SPACING	Space between each label vertically. Leave this as 0 if the labels touch each other on the page.
LABEL GROUP	Organizes labels into groups. These groups themselves are not editable.
LANDSCAPE PRINTING (USE FOR ENVELOPES)	
LABEL COLUMN POSITIONS	Horizontal position for each column of labels. Click on a link to edit it, or on (add) to add a new column.
INACTIVE	If checked, this label type will not appear when running labels or mail merges.

GMS does not perform any checks on these numbers, and it will let you define label types which exceed the boundaries of the page or overlap each other.

Basic Mailing Labels with Custom Filters

To use more advanced or custom filters on your mailing labels, click on **Basic mailing labels with custom filters**. These work much like the basic mailing labels except that they provide you with a place on the right to define your own additional filters.

When printing labels from within a Games, if a person is registered in the Games more than once, he will have a label printed for every delegation that he's in.



Settings

People are only included in this export if they meet *all* of the criteria you specify.

FOR LABELS GOING TO 2+ PEOPLE...	If checked, and two or more people sharing an address are included here, only one label will be printed for all of the people sharing that address.
LABEL TYPE	Select the label type to be used. To print a custom layout use **Custom Mailing Labels** (page 80), and to define new label types use the **Label types** (page 76) tool.
LEFT NUDGE, TOP NUDGE	Pushes the text on the label. Use negative values for left/up and positive for right/down.
FONT, SIZE	Font and size used for all text on the labels.
STARTING LABEL	Use a value other than "1" to skip labels; useful for re-using partial sheets of labels.
NAME TO USE	Choose the style of name to print on the labels.

EXCLUDE CONTACT FLAGS	Excludes people with one or more of the selected contact flags. Use this to eliminate people who don't want to get this mailing or use this mode of communication.

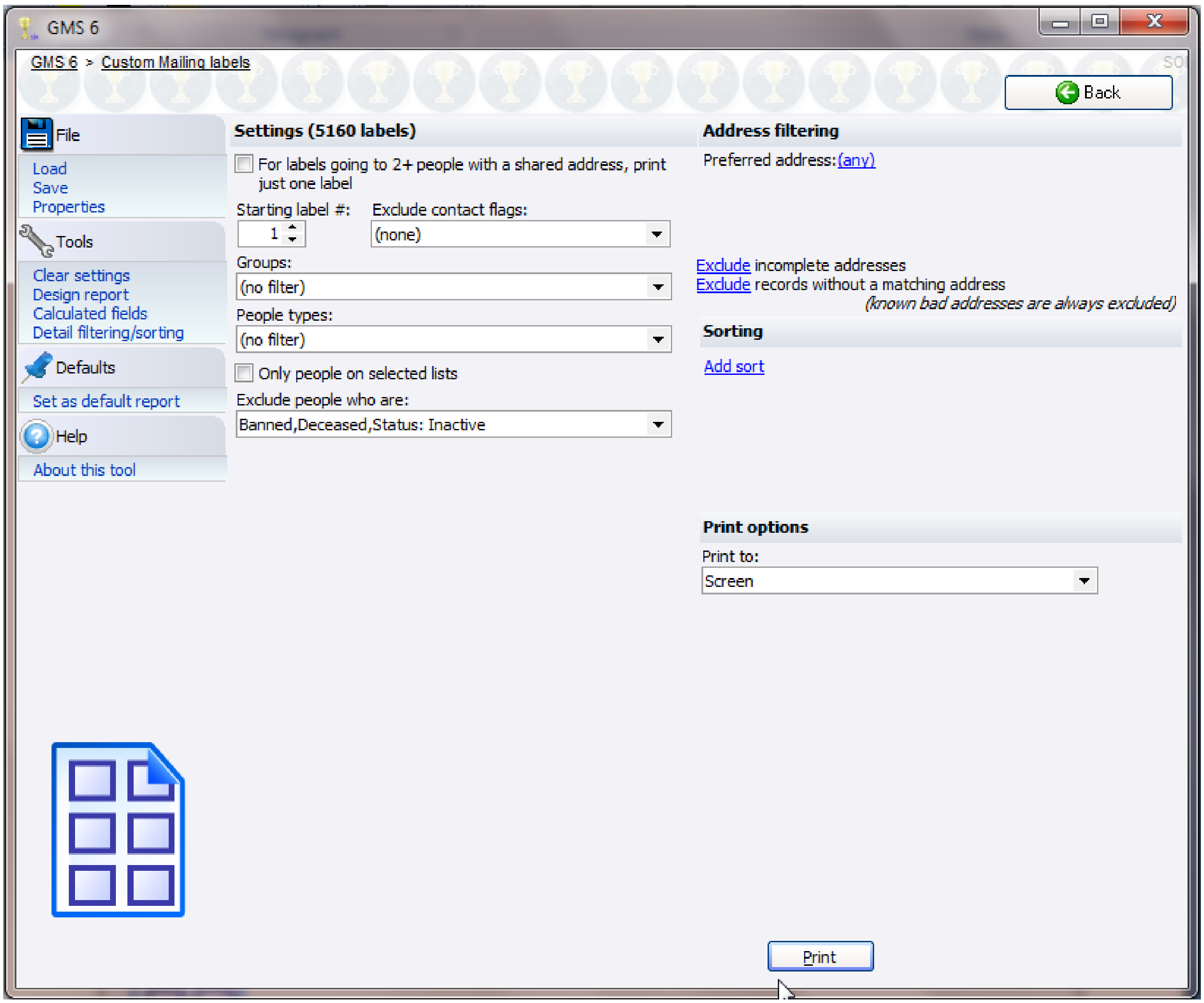
Custom Mailing Labels

Concepts

Where the basic mailing labels limit the information you can put on your mailing labels, custom mailing labels let you put any information you want on the labels. There are a number of built-in label templates that you can use.

Steps in this task

1. From the GMS main screen or from within a Games, select the Letters, mail merges and mailing labels panel, then click on Custom mailing labels.

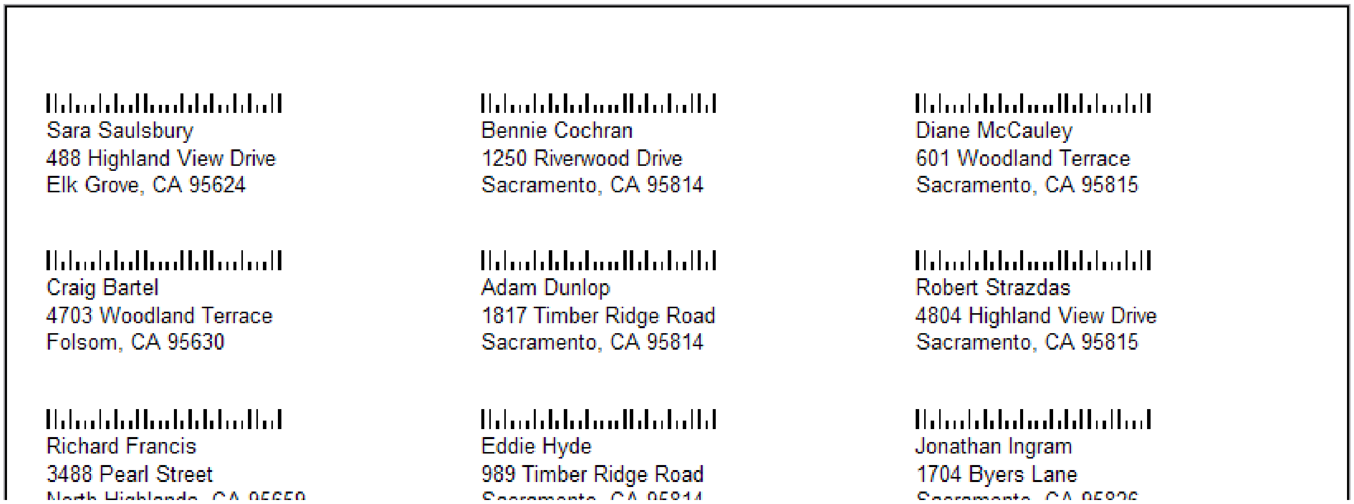


When printing labels from within a Games, if a person is registered in the Games more than once, he will have a label printed for every delegation that he's in.

2. Select a basic template to use from the list.
3. Design the contents of the label itself using the Design report link.
4. Set the filters for the people to be included. People are only included in this export if they meet *all* of the criteria you specify.

For labels going to 2+ people...	If checked, and two or more people sharing an address are included here, only one label will be printed for all of the people sharing that address.
Starting label #	GMS can skip labels if you re-use a partial sheet of labels. Set this to the label to start. The label at the upper-left corner is considered the first label.
Exclude contact flags	Excludes people with one or more of the selected contact flags. Use this to eliminate people who don't want to get this mailing or use this mode of communication.
Groups (Delegations within a Games	Only people in these groups/delegations are included.
People types (Entrant roles within a Games)	Only people of these types (globally) or roles (in a Games) are included.
Individual types	Filters by Individual type.
Team filters	Use this to include only people who are teams, exclude people who are teams, or include both.
Scratched people (Games only)	Only people not scratched, Only scratched people or (any).
Filter by assignments	Requires that the person has assignments which meet your criteria.
Only people on selected lists	Check this to filter recipients to only people on one or more of the lists you check.
Exclude people who are...	Filters to exclude people who are inactive, applicant, prospect, deceased, placeholder or banned.
Address filtering	Choose which address types are preferred by setting an order here, and include (any) as the last fallback address type. This creates a label for any valid address even if it's not selected here. Then include or exclude incomplete addresses (those missing one or more of an address line, city, state and zip/postal code), and whether people who don't have an applicable address should be excluded or included.

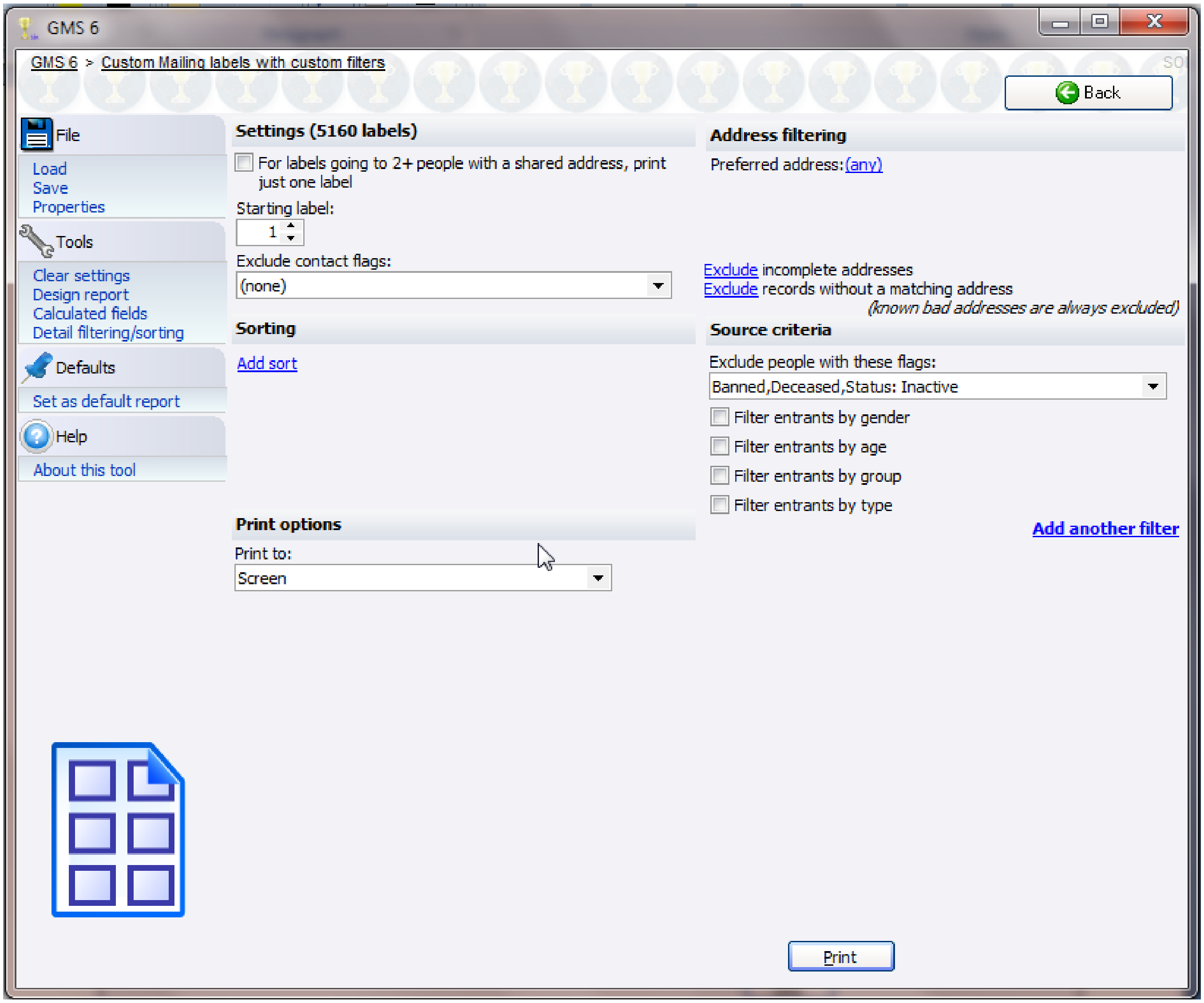
5. Add one or more sort criteria to make GMS sort the labels into a particular order for you. Labels will first be sorted by the topmost field, then the second field, then the third, and so on. The and arrows next to each field indicate that the field will be sorted ascending or descending, respectively. Checking (no page break) or with page break turns page breaks for this field on and off. You might use page breaks to separate labels by delegation, by role, or by postal code.
6. After setting your filters, label options and sorting options, pick the printer to send the labels to or to Screen. Click on the **Print** button.
7. If desired, use the Save links to save the labels layout and criteria for future use.



Sara Saulsbury 488 Highland View Drive Elk Grove, CA 95624	Bennie Cochran 1250 Riverwood Drive Sacramento, CA 95814	Diane McCauley 601 Woodland Terrace Sacramento, CA 95815
Craig Bartel 4703 Woodland Terrace Folsom, CA 95630	Adam Dunlop 1817 Timber Ridge Road Sacramento, CA 95814	Robert Strazdas 4804 Highland View Drive Sacramento, CA 95815
Richard Francis 3488 Pearl Street	Eddie Hyde 989 Timber Ridge Road	Jonathan Ingram 1704 Byers Lane

Custom Mailing Labels with Custom Filters

To use more advanced/custom filters on your custom labels, click on Custom mailing labels with custom filters. These work much like the custom mailing labels except that they provide you with a place to define additional filters.



Settings

People are only included in this export if they meet *all* of the criteria you specify.

FOR LABELS GOING TO 2+ PEOPLE... If checked, and two or more people sharing an address are included here, only one label will be printed for all of the people sharing that address.

EXCLUDE CONTACT FLAGS Excludes people with one or more of the selected contact flags. Use this to eliminate people who don't want to get this mailing or use this mode of communication.

Demographics Reports

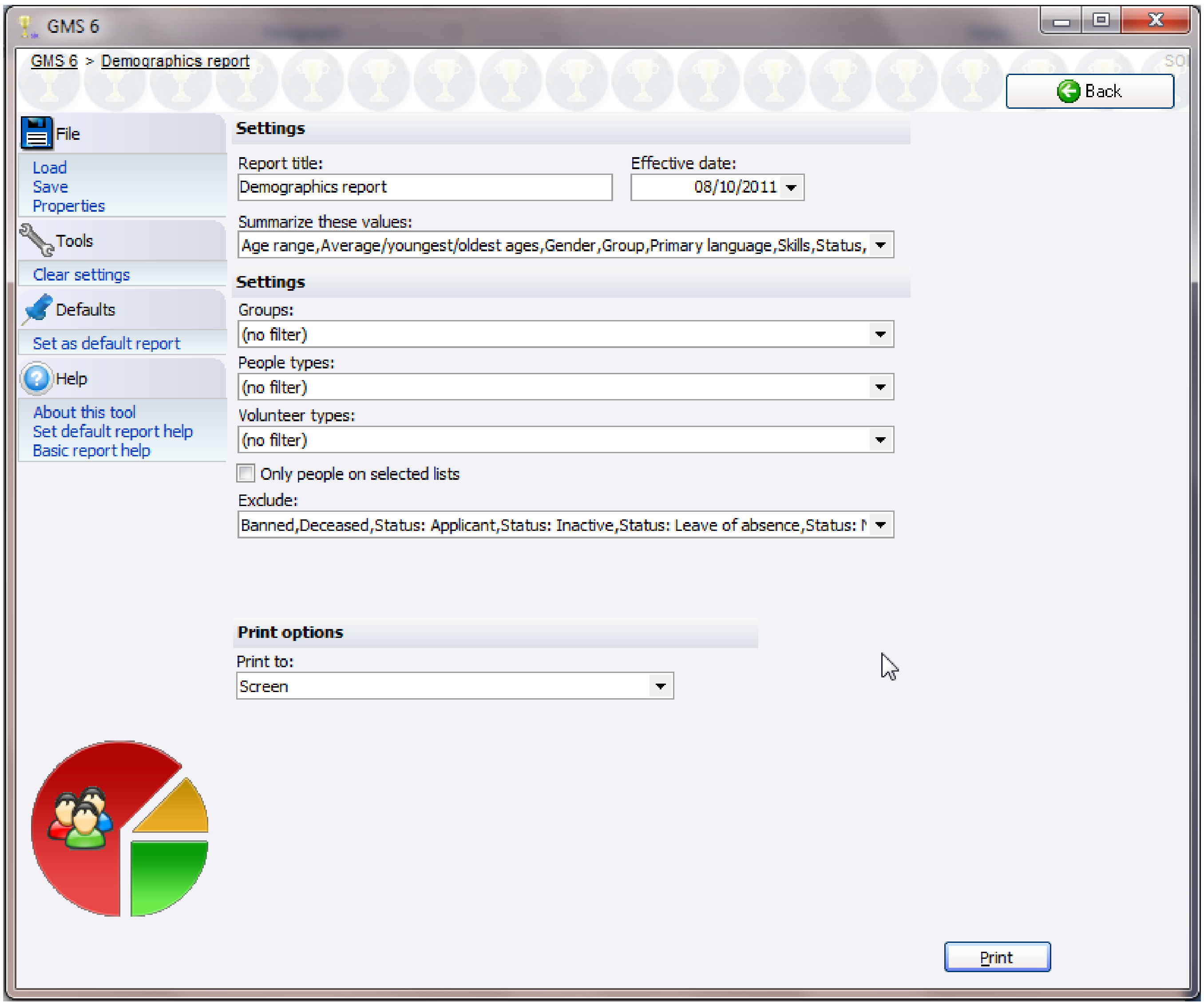
Demographics reports summarize all of your people based on various properties like gender, group, status, type and custom fields.

When to use this report

- End-of-year reports for management.
- Better understand the makeup of your Individual base, or to compare one group of Individuals against another.

Steps in this task

1. Click on Demographics from the Reports panel.



2. Give your report a title, choose the date for determining when Individuals are active/inactive/etc.
3. Choose the fields to be summarized. Available fields include Additional groups, Additional languages, Additional types, Age range, Average/youngest/oldest ages, Contact flags, Gender, Group, Primary language, Reason archived, Reason inactive, Skills, Special needs, Status, Team, Type, Individual source, Individual type and Wheelchair. In addition, any custom field which is a checkbox, drop-down or checklist can be summarized here as well.
4. Filter your Individuals by GROUP, PEOPLE TYPE, INDIVIDUAL TYPE, or LIST.
5. Optionally exclude out people who are inactive, archived, etc.
6. Click **Print** to run the report.

Sample

Demographics report

Gender

Female	52%	293
Male	48%	270
	Total:	*563*

Group

Bespoke Software, Inc.	1%	5
Exempt	19%	108
General	0%	2
High Risk (ED/PC, SDS)	8%	47
Moderate Risk	0%	1
Non Exempt	60%	335
Young Members	12%	65
	Total:	*563*

Marital status (custom field)

Divorced	0%	1
Engaged	0%	1
Married	19%	107
Separated	0%	2
Single	20%	112
Unknown	5%	28
Widowed	3%	19
	Total:	*270*

Primary language

	96%	542
English	3%	18
German	0%	1
Spanish	0%	2
	Total:	*563*

Skills

Administration/Office	3%	17
Child Care	0%	1

Tip: Fields which can have multiple values, like SKILLS, can total to more than 100%.

Tip: If you see a group of something like WURF57A5WM46HJPG as a group name, you have people with no group. This can happen if the group is deleted, but not the members. To find these Individuals, use an Intellilist with all the Individuals in your database, then subtract the ones that have valid groups.

Expiring Certifications Reports

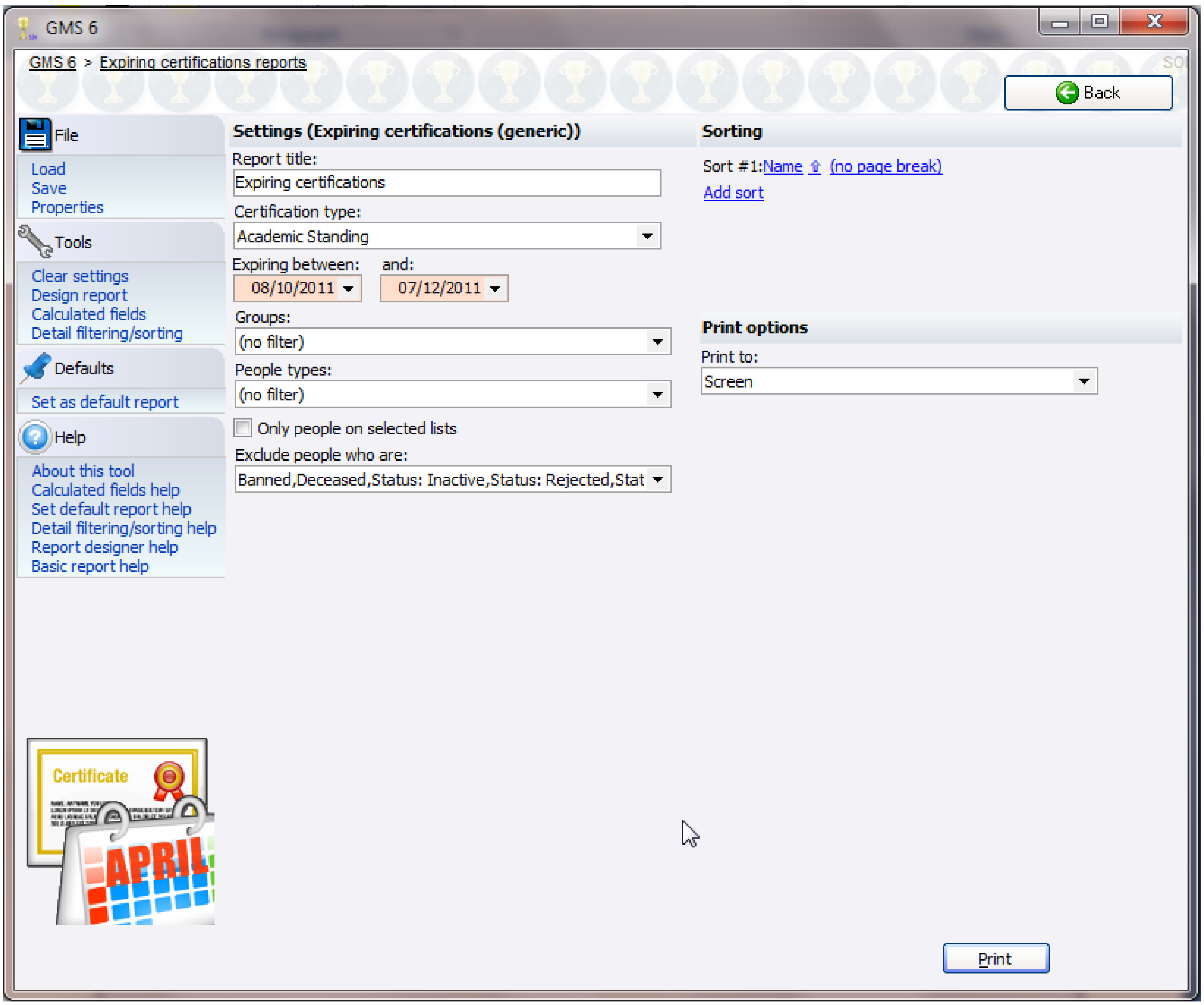
This will report on certifications of any kind with a set range of expiration dates, plus other criteria you specify. This can be run for only one kind of certification at once, but very easy to use.

When to use this report

- Whose TB test is about to expire?
- Whose HIPAA training *did* expire?

Steps in this task

1. Click on the Expiring certifications link from the Reports panel.



2. Set the REPORT TITLE, then choose the type of certification to work with and the expiration date range.
3. Set filters on GROUPS, PEOPLE TYPES, INDIVIDUAL TYPES, TEAM FILTERS and LISTS.
4. Click **Print** to run the report.

Sample

Expiring certifications

Chevrette, Michael					**TB Test**	**Expiration date: 03/10/2011**
[illegible]	Male	Volunteer	Class A adult	Bespoke Software, Inc.		
Clink, Jennifer M					**TB Test**	**Expiration date: 03/12/2011**
[illegible]	Female	Volunteer	n/a	Bespoke Software, Inc.		
Cornett, William					**TB Test**	**Expiration date: 06/19/2011**
[illegible]	Male	Staff	General volunteer	Bespoke Software, Inc.		
Olsen, Janelle					**TB Test**	**Expiration date: 01/07/2011**
[illegible]	Female	Volunteer		Bespoke Software, Inc.		
Roth, Erin M					**TB Test**	**Expiration date: 03/12/2011**
[illegible]	Female	Volunteer	Other	Bespoke Software, Inc.		
Smith Jr, Dale "The Man"					**TB Test**	**Expiration date: 10/01/2011**
[illegible]	Male	Volunteer	Other	Bespoke Software, Inc.		

Tip: In the ***Report Designer*** (page 119), normally you get one pipeline for each type of certification. This one's special: there's a "magic" pipeline called "Certifications", and in it you can use the fields which are common to all certifications: "Description", "Effective date", "Expiration date", and "Other info". "Other info" can contain multiple fields. Set this up in the ***definition of each certification*** (page 29).

Invalid Addresses Reports

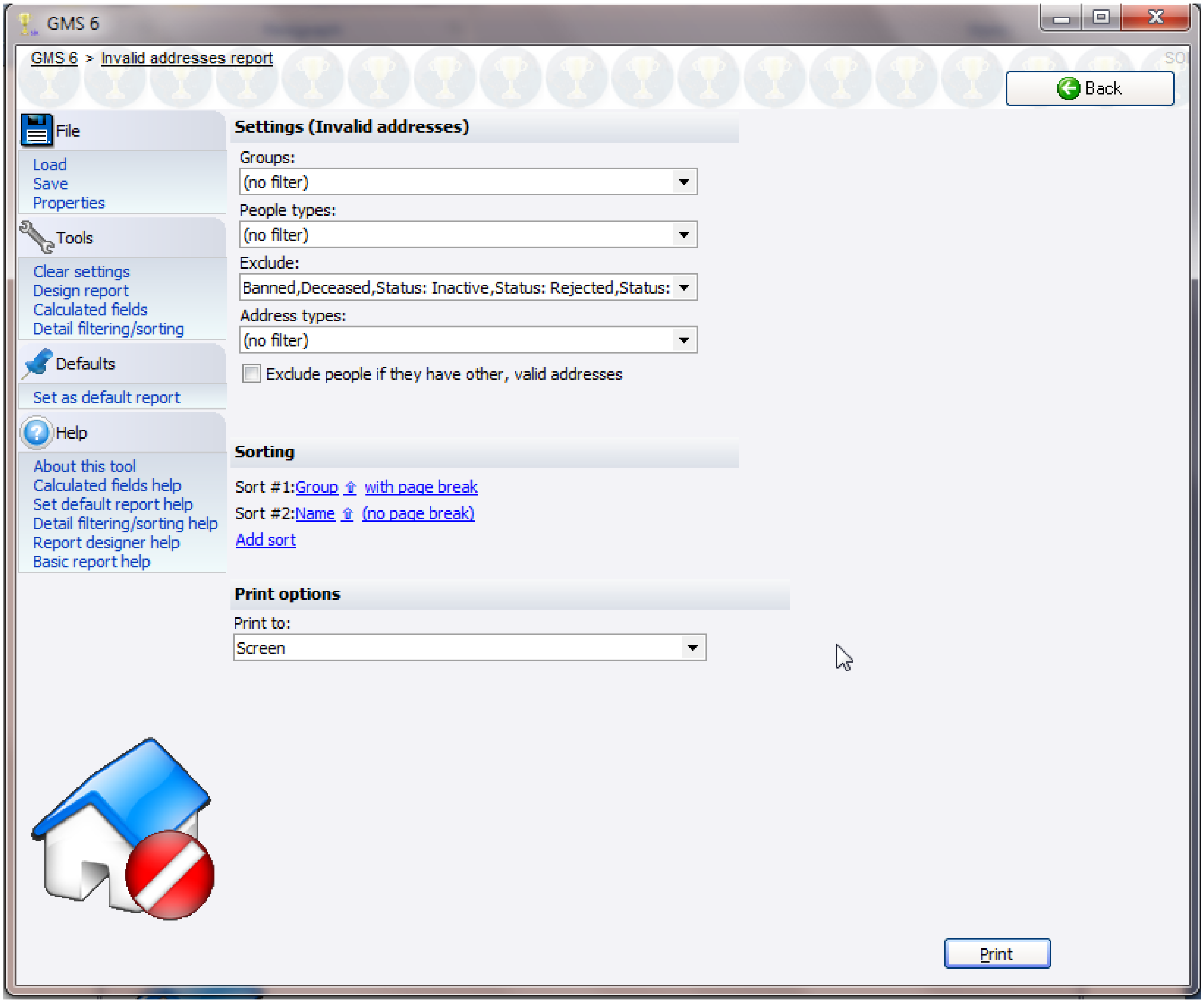
Printing lists of people with their valid addresses is easy - there are filters for that everywhere - but where do you get the addresses which are known to be invalid?

When to use this report

- What Individuals have bad addresses?

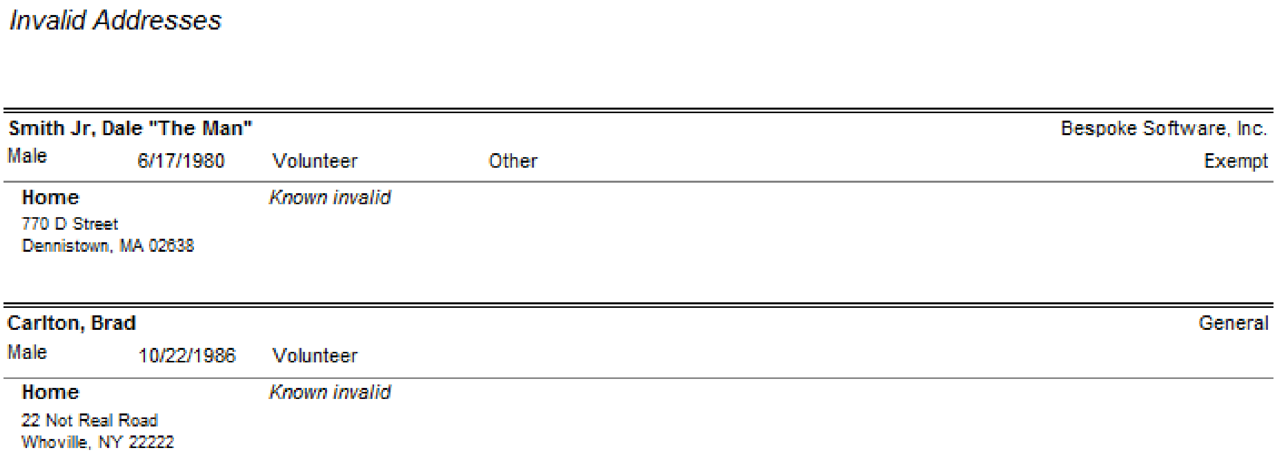
Steps in this task

1. Click on the Invalid addresses link from the Reports panel.



2. Set filters on GROUPS, PEOPLE TYPES, exclude archived/inactive/etc. people.
3. Choose the type(s) of addresses to include.
4. Check EXCLUDE PEOPLE IF THEY HAVE OTHER, VALID ADDRESSES to exclude from this report people who have at least one valid address. If this is not checked, someone who has one bad address and two good ones will be printed here.
5. Click **Print** to run the report.

Sample



Invalid Addresses

Smith Jr, Dale "The Man" Bespoke Software, Inc.
Male 6/17/1980 Volunteer Other Exempt

Home *Known invalid*
770 D Street
Dennistown, MA 02638

Carlton, Brad General
Male 10/22/1986 Volunteer

Home *Known invalid*
22 Not Real Road
Whoville, NY 22222

People Reports

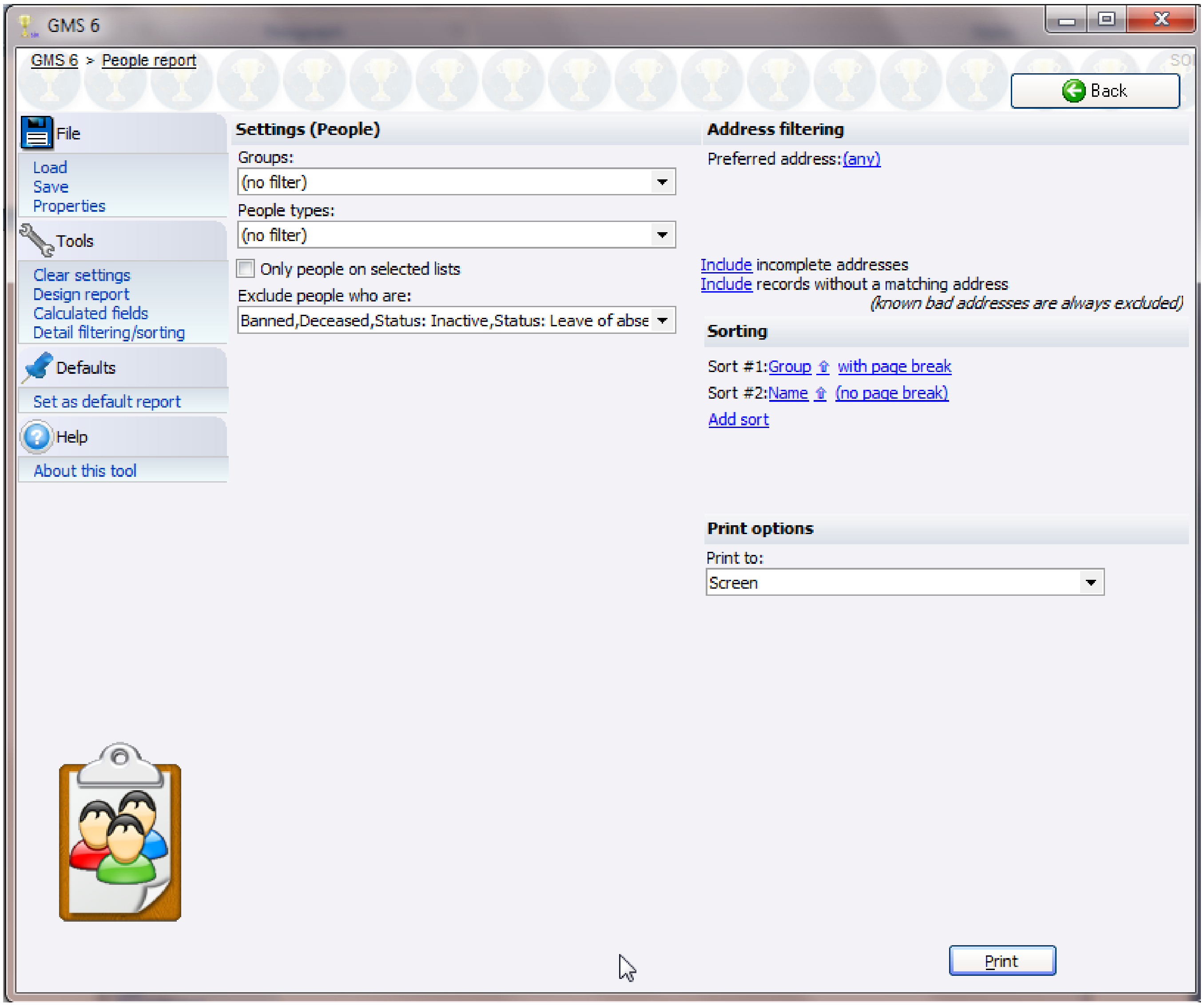
People reports are used to report people. You can include all sorts of attributes, but it is a list of people.

When to use these reports

- To create lists of contact information.
- To summarize who the Individuals (people) are in your organization.

Steps in this task

1. From the GMS 6 main screen, open the Reports panel then click on People.



2. Select one of the pre-defined report layouts or one that you've previously saved.
3. Set your criteria: GROUPS, PEOPLE TYPES, INDIVIDUAL TYPES.
4. Optionally filter people based on their having assignments by location, job, date and count.
5. To filter the report to only people on lists, check ONLY PEOPLE ON ONE OR MORE LISTS, then select the lists to be included. A person will be included only if he's on any of the lists you choose.
6. Exclude archived, deceased and other statuses with the EXCLUDE PEOPLE WHO ARE filter.
7. Set your address criteria.
8. Set your sort criteria.
9. Choose the printer to send your report to, Screen, or any of the other special types.
10. Click the **Print** button.

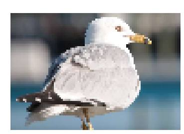
Tip: After you've gotten your settings the way you want them, you may want to save this report's settings for future use by clicking on Save then As a new report.

People Report

A detailed row for every Individual with name, gender, date of birth, type, Individual type, group and additional groups, wheelchair, inactive, language, background check color & expiration date, restrictions, additional restrictions, address, comments and photo.

People

Bespoke Software, Inc.

Chevrette, Michael Male Class A adult 123 Fake St Easthampton, MA 01027	Language: English Green:Unrestricted	Volunteer Expires: 03/05/2011	**Active** Bespoke Software, Inc.	
Clink, Jennifer M Female n/a	Language: English	Volunteer	**Active** Bespoke Software, Inc.	
Cornett, William Male 03/01/1970 General volunteer 5 Sand Creek Rd Albany, NY 12205	Language: English	Staff	**Active** Bespoke Software, Inc.	
Olsen, Janelle Female 01/06/1982	Language: English	Volunteer	**Active** Bespoke Software, Inc.	
Roth, Erin M Female Other 25 home street Albany, NY 12205		Volunteer	**Active** Bespoke Software, Inc.	
Smith Jr, Dale "The Man" Male 06/17/1980 Other 5 Sand Creek Rd Albany, NY 12205	Language: English Green:Unrestricted	Volunteer Expires: 10/21/2013	**Active** Bespoke Software, Inc. Exempt	

People Summary by Group Report

This report counts the people who meet your criteria, then summarizes them by group.

People summary by group

Bespoke Software, Inc.	6
Exempt	108
General	133
High Risk (ED/PC, SDS)	47
Memorial	170
Moderate Risk	1
Non Exempt	333
Young Members	65
Total	***863***

People Summary by Group and Type Report

Counts the people who meet your criteria, then summarizes them by group and primary person type.

People summary by group and type

Bespoke Software, Inc.		
	Staff	1
	Volunteer	5
	Total	6
Exempt		
	Volunteer	108
	Total	108
General		
	Volunteer	133
	Total	133
High Risk (ED/PC, SDS)		
	Volunteer	47
	Total	47
Memorial		
	Volunteer	170
	Total	170
Moderate Risk		
	Volunteer	1
	Total	1
Non Exempt		
	Volunteer	333
	Total	333
Young Members		
	Other person	1
	Volunteer	64
	Total	65
		863

Phone Lists Report

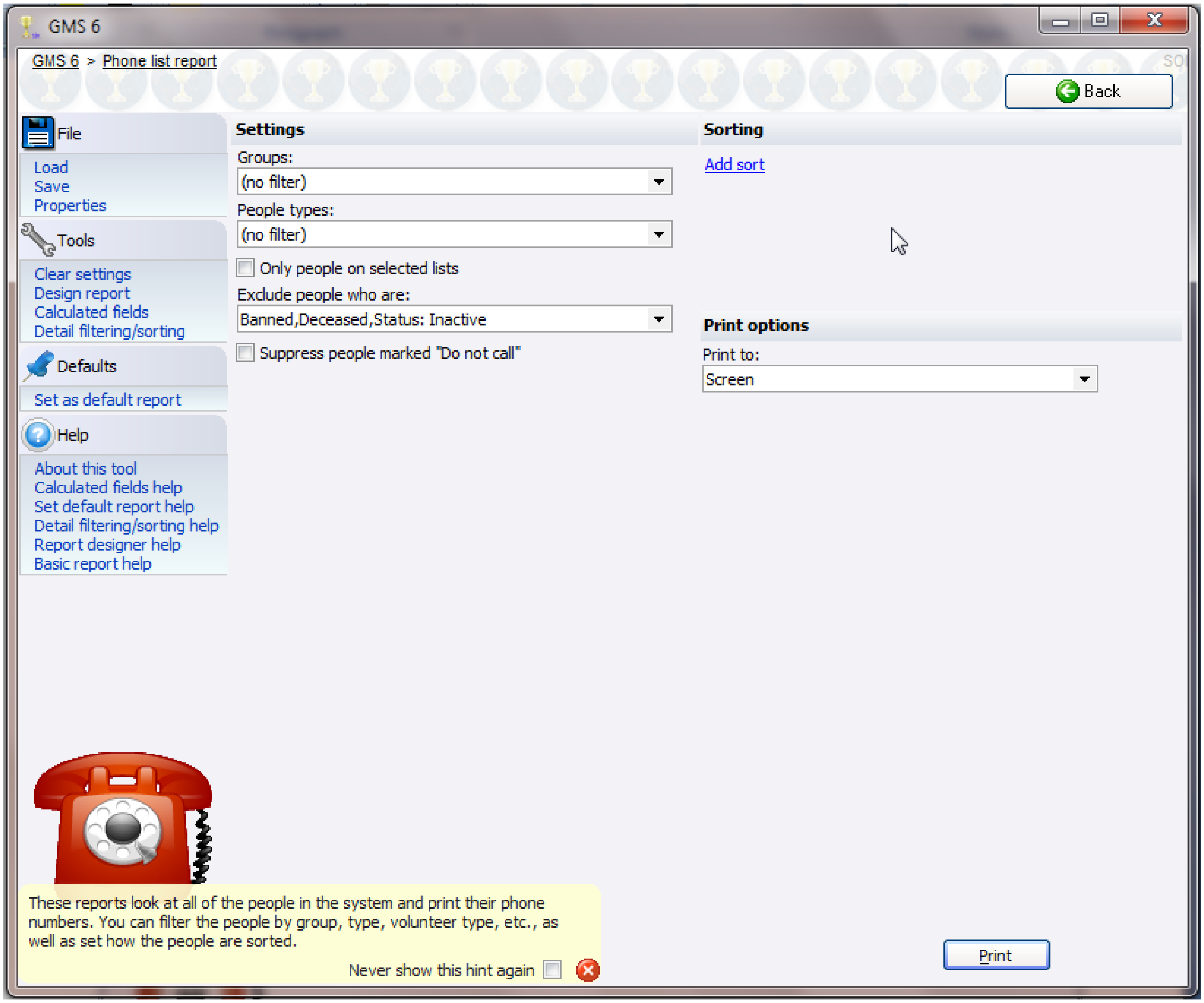
These simple reports are designed to print the phone numbers for people who meet your criteria. (Remember, e-mails may also be stored in the phone fields.) You'll find them globally and within specific Games on the Reports panel. When run from inside of a, they only include people in that Games.

When to use this report

- To give it to your recruiters.
- To contact people to notify them of Games delays or changes.
- To make thank-you calls after an event.

Steps in this task

1. Click on the Phone list link from the Reports panel.



2. Set your filters: GROUPS/DELEGATIONS, PEOPLE TYPES/ROLES, INDIVIDUAL TYPES, lists, exclusions of archived/banned/inactive/etc. people and on teams.
3. From within a Games, choose to include scratched people or not, and to filter on each person's assignments.
4. Choose your sort order.
5. Click **Print** to run the report.

People with more than one phone number will show all of their valid phone numbers and their types next to their names.

Sample

Phone list

Bespoke Software, Inc.

Clink, Jennifer M

Home: (518) 785-1234
[illegible]

Cornett, William

Home: 518-479-0400
E-mail: [illegible]
Business: (518) 618-0746
Mobile: (518) 444-5555
E-mail: info2@bespoke.com

Roth, Erin M

Home: (518) 555-1212
Business: (518) 618-0746
Mobile: (518) 111-2323
E-mail: [illegible]

Smith Jr, Dale "The Man"

Business: (774) 614-4355
E-mail: [illegible]
E-mail: dale@bespoke.com

When working within a Games, if a person is registered in the same Games more than once, he'll print on this report once for every delegation he's registered in.

Summary/Crosstab Reports

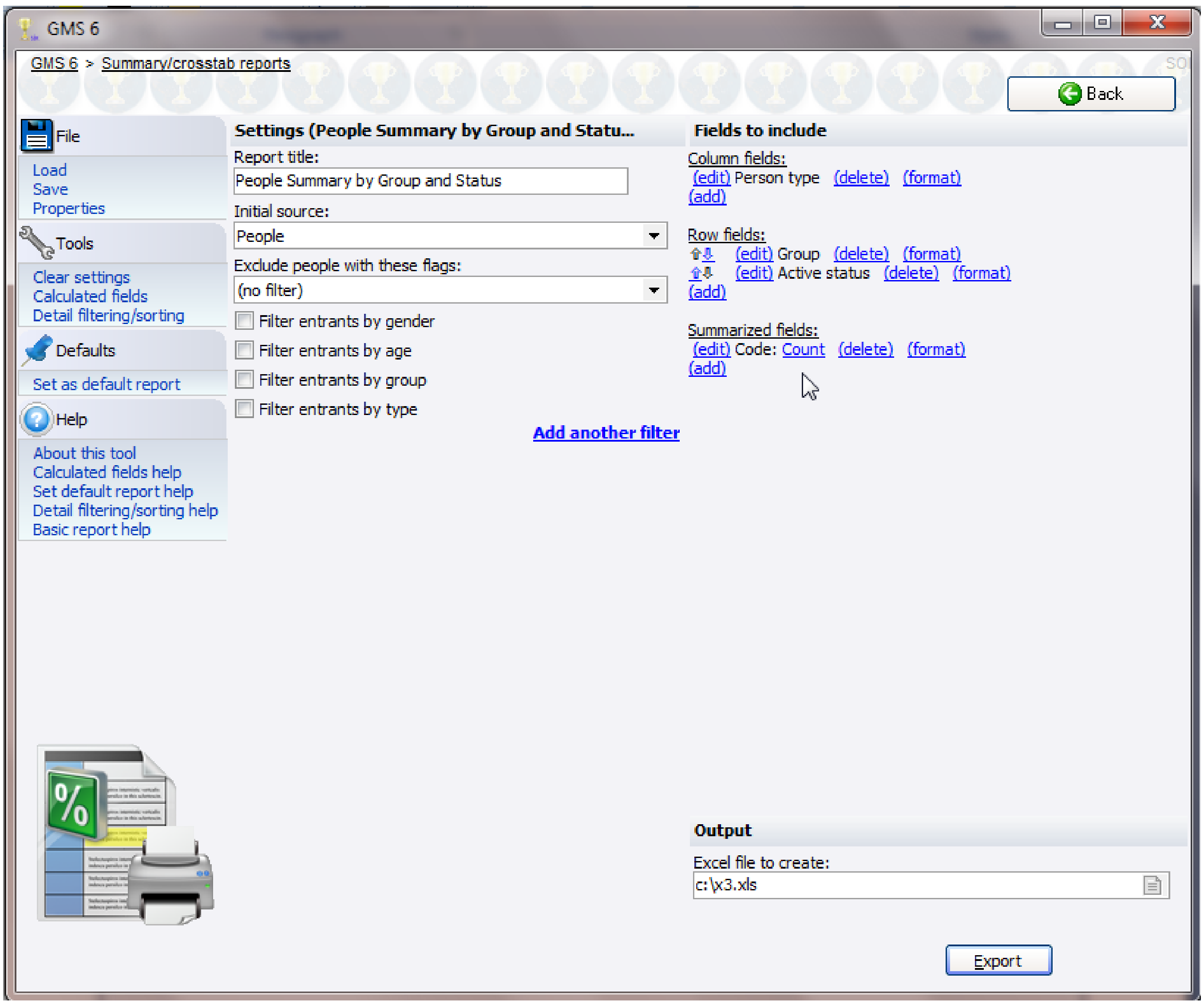
Summary (crosstab) reports are a special kind of report. They summarize records of various types in a grid format. You define the columns and rows along with the values to be summarized, then GMS totals the values.

- Summary/crosstab reports are exported to Excel rather than printed. This affords you much more flexibility in how you present the data rather than being restricted to how GMS would do it automatically.
- You'll regularly use calculated fields here to distill the information down. Rather than using the date of an assignment, for example, you're more likely to want the month, quarter or year in order to have columns and rows that make sense.
- Use the five built-in sample reports: Person Type Transitions Summary, Survey Summaries and Individual Counts by Active Status and Date Started as examples on how these reports work and what you can get from them.

Summary: Status by Date Started Report

Start out with the built-in report Individual Counts by Active Status and Date Started.

Click on Summary/Crosstab from the Reports panel. Then select Individual Counts by Active Status and Date Started.



On the left we have the REPORT TITLE, an INITIAL SOURCE of people (meaning that people will be the basis for the report/the records we summarize will be people), and any filters on the people themselves. To the right are the fields we're working with:

- The columns of the report will be the various active statuses of people.
- Rows will be the year that each person started. Note the "*" at the beginning of that field: it means that DATE STARTED YEAR is a calculated field.
- Summarized fields is the count of unique people (their codes).

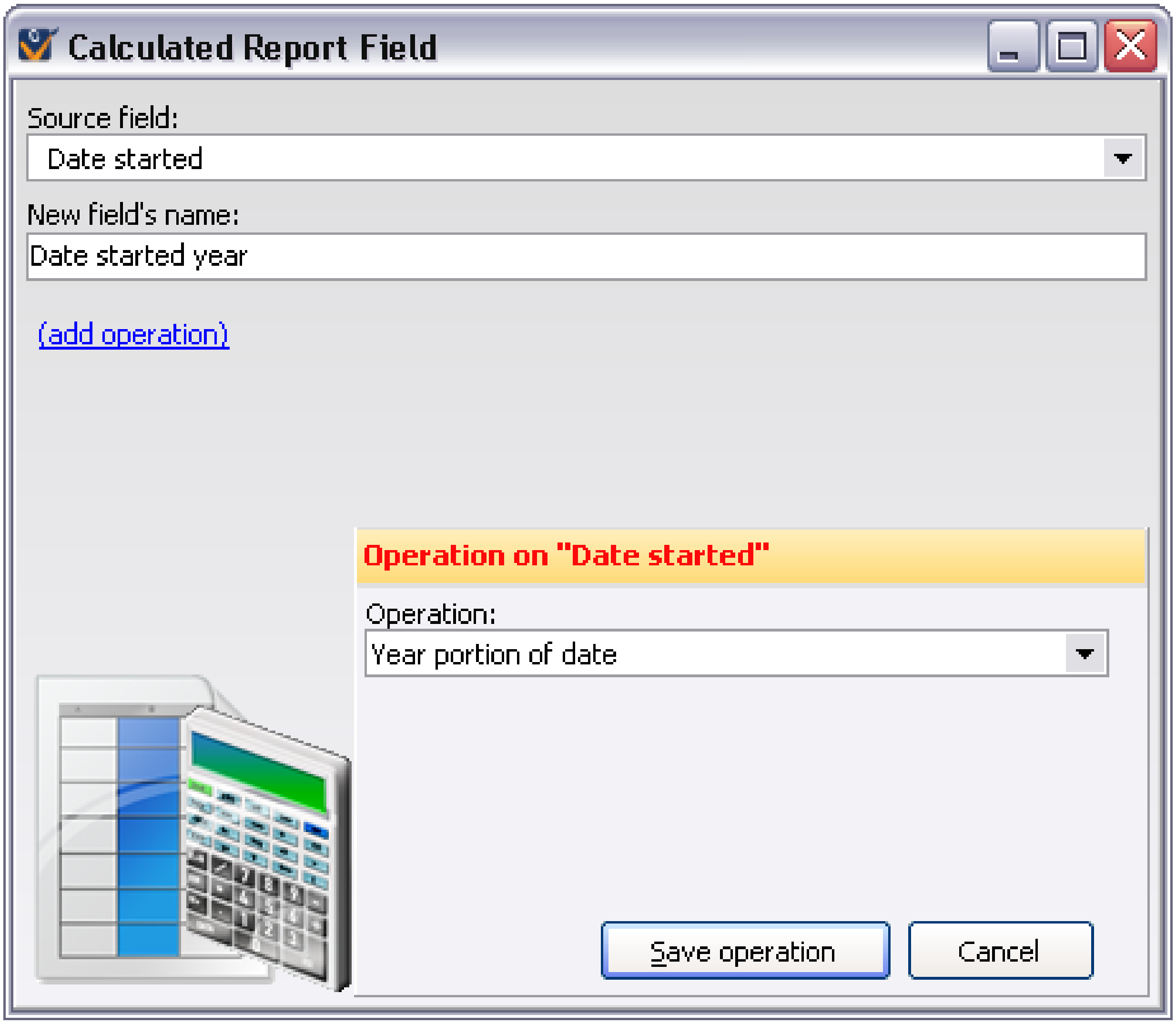
To print the results,

1. Set your filters.
2. Choose the column fields, row fields, and summarized fields.
3. Select an output file to create (GMS makes an Excel file), then click **Export**.

Volunteers Started by Year						
Active status:	Active	Applicant	Inactive	Prospect	Terminated	*total*
**Date started year*	Count	Count	Count	Count	Count	Count
(blank)	564	150	1,250	145	11	2,120
1989	1					1
1990	1		1			2
1994	1					1
2000				1		1
2001	1					1
2002	1					1
2006		2				2
2007	1					1
2008	1					1
Total	***571***	***152***	***1,251***	***146***	***11***	***2,131***

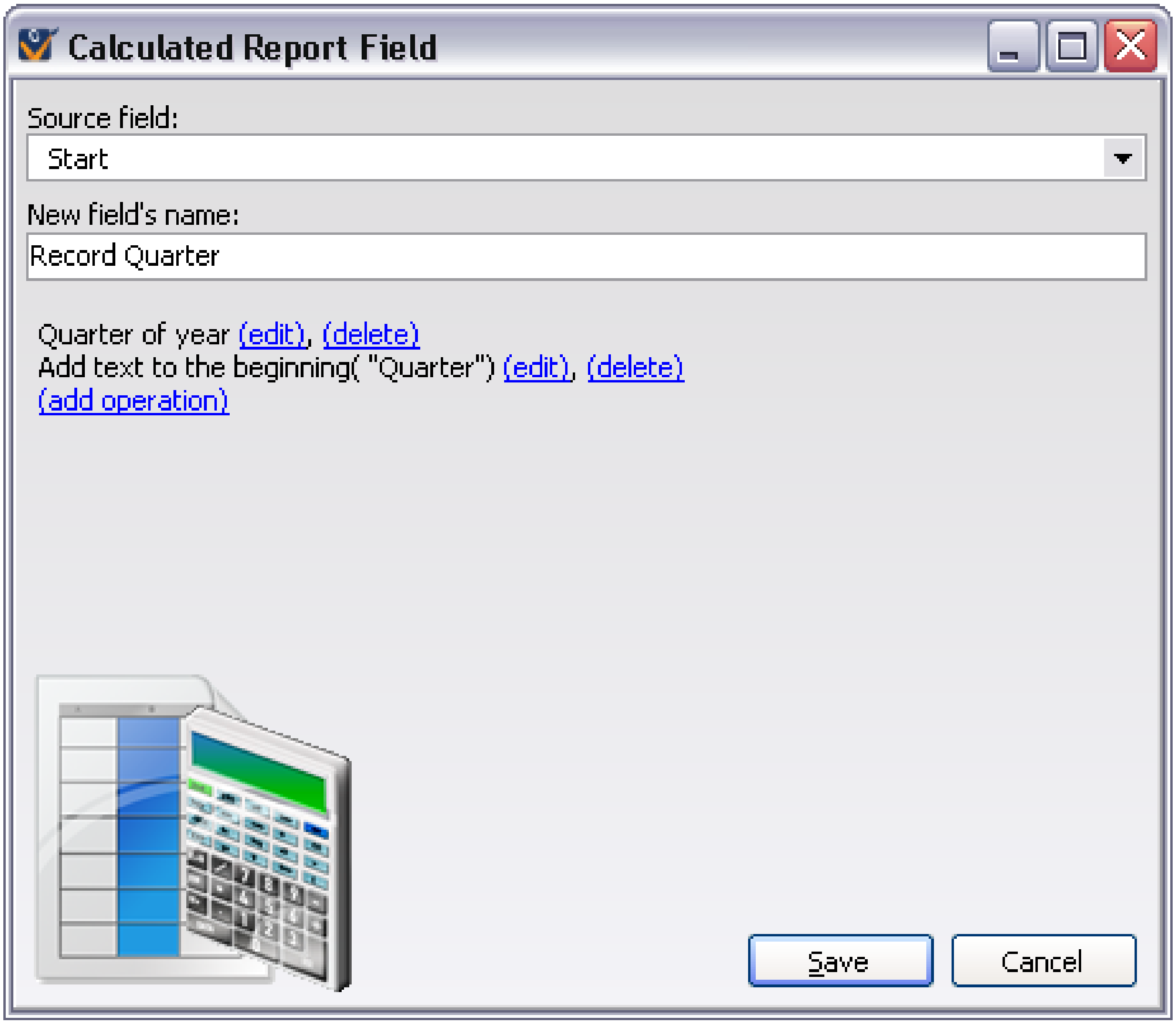
Calculated Fields

This report needed a ***calculated field*** (page 106) to work: if we just used the person's DATE STARTED, we'd get one row for January 1st, 1991, another for January 2nd, 1991, etc., when we want a single row for each year. To do this we clicked on Calculated fields and defined a new field. The SOURCE FIELD here is the person's DATE STARTED, and we gave the field a name. Then we added the operation "Year portion of date", which takes - for any date field - just the year portion. Someone who started on January 4th of 1989 and another who started October 31st of 1989 would both have the DATE STARTED YEAR value of 1989.



Calculated Fields

This report needed a two calculated fields to work: if we just used the record's date, we'd get insane numbers of columns. Here we're using one calculated field from the date to get the year, another to get the quarter.



Summary Calculations

For each summarized field there are five available calculations:

Calculation	Results
Sum	Total of all values which are processed. (Numeric fields only)
Minimum	Lowest value.
Maximum	Highest value
Average	Average value (sum divided by count). (Numeric fields only)
Count	Number of values which are processed. Counting, for example, a person's code, if a single person has three records, he counts three times.
Unique count	Number of unique values which are processed. In the example above, that person would count only once.

Training Reports

Training reports come in two flavors: courses and rosters.

- ***Training course reports*** (page 100) detail information about the courses (classes), but not the students within them.
- ***Training rosters*** (page 102) include information about not only the courses but also the students registered in those courses.

There are several built-in reports in these categories, but you can modify these to suit your own needs or design new ones from scratch.

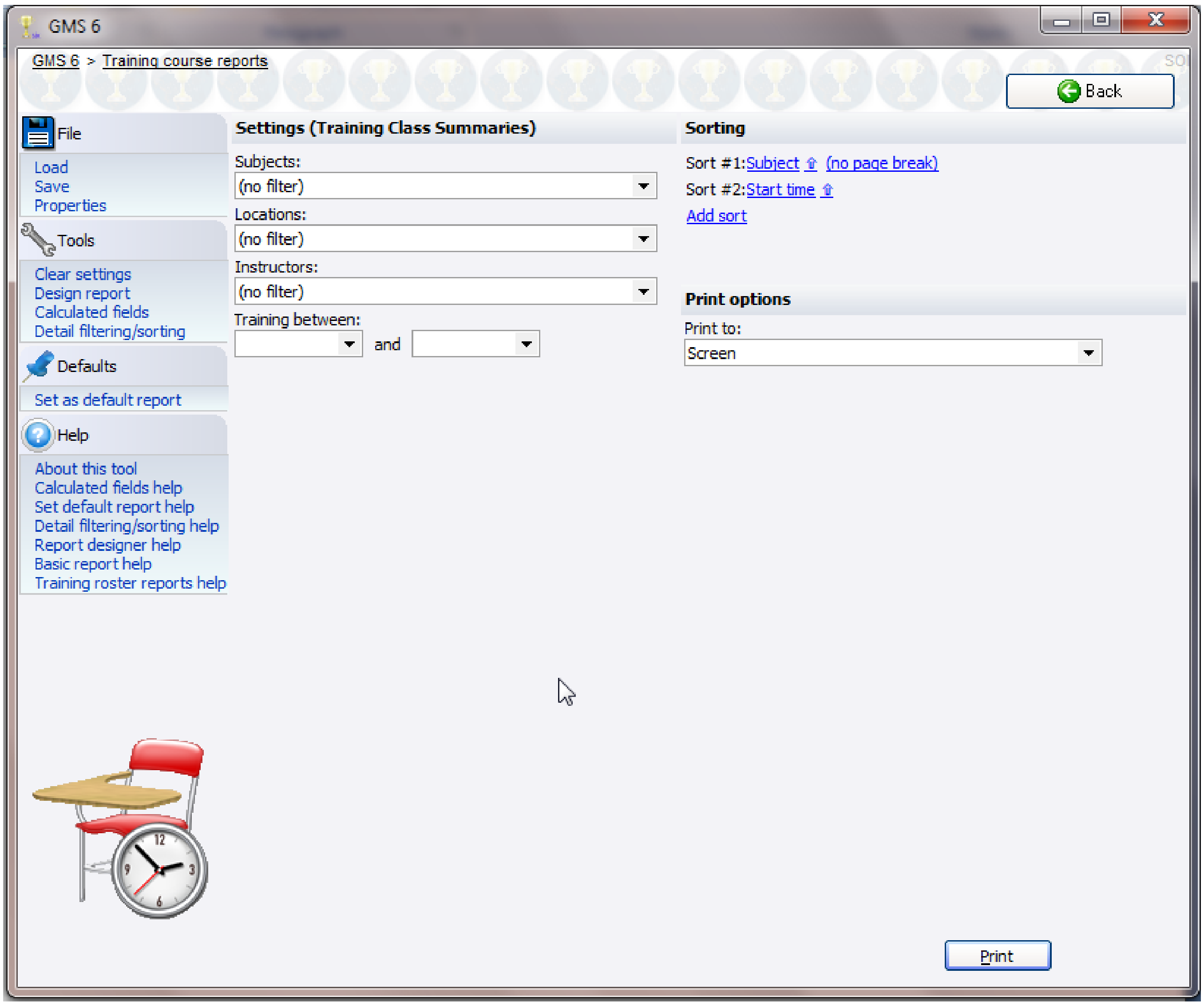
Training Courses Report

When to use this report

- To get overview information about the courses themselves, including courses which have no students registered in them.
- See when courses are scheduled, counts in them, remaining capacity.
- To reserve conference room space and arrange catering.
- For the receptionist to answer quick questions about room in upcoming courses.

Steps in this task

1. Click on the Training courses link from the Reports panel globally, or click on Course reports from within the Training courses tool.



2. Select a built-in or saved report to use.
3. Set any filters: SUBJECTS, LOCATIONS, INSTRUCTORS, and dates.
4. Choose your sort order.
5. Click **Print** to run the report.

Sample

Training Class Summaries

Subject	Location	Instructor name	Min	Max	Count	Start	Duration	Catering
Confidentiality/HIPAA	General	Roth, Erin M	30	30	24	03/04/2009 10:00AM	1:00	
Confidentiality/HIPAA	General		10	30	22	03/04/2009 02:00PM	1:00	
Confidentiality/HIPAA	General	Roth, Erin M	0	0	1	07/15/2009 07:00PM	4:00	
Confidentiality/HIPAA	General	Roth, Erin M	0	0	0	08/01/2009 08:00AM	4:00	
Confidentiality/HIPAA	General	Roth, Erin M	0	0	3	08/15/2009 07:00PM	4:00	Coffee - lots of coffee
Confidentiality/HIPAA	5 East	Chevrette, Michael	0	25	0	12/15/2009 07:30PM	3:00	
Mission/SHARE	General		15	60	50	03/02/2009 12:00PM	2:00	
Orientation	General	Chevrette, Michael	0	0	0	08/01/2009 09:00AM	1:00	
Orientation	General	Chevrette, Michael	0	25	3	09/01/2009 09:00AM	3:00	Pizzas
Rescue Breathing	General	Chevrette, Michael	10	30	26	03/05/2009 03:00PM	2:00	
Rescue Breathing	General	Chevrette, Michael	10	30	28	03/05/2009 09:00AM	2:00	
Safety	General	Roth, Erin M	20	60	44	03/05/2009 04:30PM	1:00	
Safety	General	Roth, Erin M	0	25	0	10/05/2009 07:30PM	2:30	
Safety	5 East	Roth, Erin M	0	0	0	12/10/2009 07:30AM	2:30	
Safety	5 East	Roth, Erin M	0	0	1	12/20/2009 03:30PM	2:30	
Sales 101	General	Roth, Erin M	3	50	22	06/12/2009 08:00PM	3:00	Lots of pizza

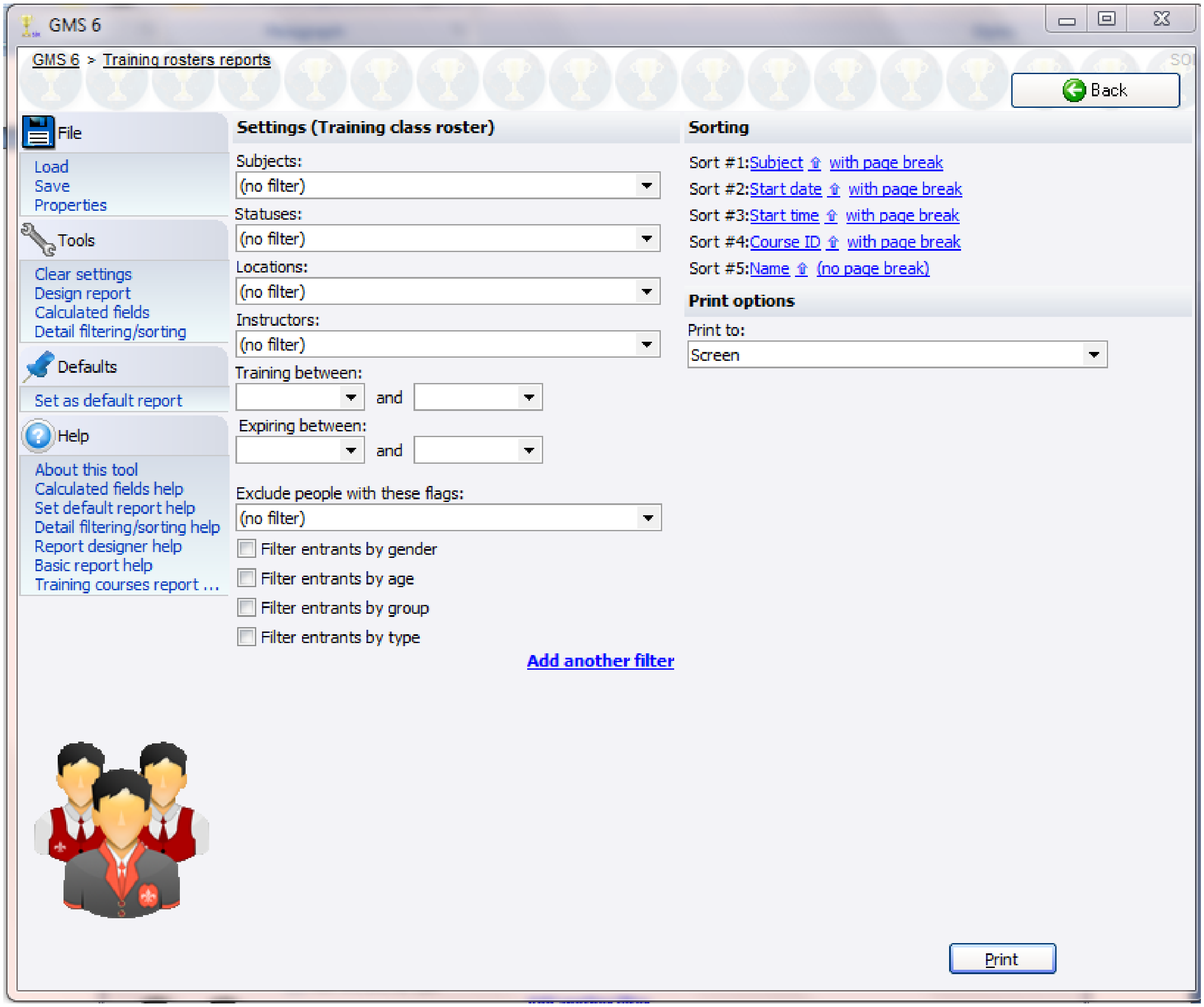
Training Rosters Report

When to use this report

- To get detailed information about courses and their students.
- To print sign-in sheets.
- To print lists of people who have taken classes, even across different courses.

Steps in this task

1. Click on Training rosters from within the Reports panel, or click on Rosters reports from within the Training courses tool.



2. Select a built-in or saved report to use.
3. Set any filters on the training records themselves: SUBJECTS, STATUSES, LOCATIONS, INSTRUCTORS, course dates and expiration dates.
4. Add any filters on the students.
5. Choose your sort order.
6. Click **Print** to run the report.

Sample (details)

Training details

Confidentiality/HIPAA

		Date	Status	Expiration
Fuentes, Gordon K		03/04/2009 10:00AM	Registered	
Volunteer	Student			Young Members
Harris, Sheila L		04/01/2010 08:00AM	Registered	04/01/2011
Volunteer	Other			Exempt
Hayes, Marguerite A		02/01/2010 08:00AM	Registered	02/01/2011
Volunteer	Other			Non Exempt
Hayes, Marguerite A		06/01/2010 08:00AM	Registered	06/01/2011
Volunteer	Other			Non Exempt
Heck, Christian A		03/04/2009 10:00AM	Registered	
Volunteer	Other			Young Members
Hinton, Teresa C		06/01/2010 08:00AM	Registered	06/01/2011
Volunteer	Other			Non Exempt
Hysell, Alex M		04/01/2010 08:00AM	Registered	04/01/2011
Volunteer	Other			Exempt
Johnson, Malcolm J		02/01/2010 08:00AM	Registered	02/01/2011
Volunteer	Other			Non Exempt
Keller, Heather S		03/04/2009 10:00AM	Registered	
Volunteer	Student			Young Members
Kitchens, Edward T		05/01/2010 08:00AM	Registered	05/01/2011
Volunteer	Other			Non Exempt
Lara, Judy J		04/01/2010 08:00AM	Registered	04/01/2011
Volunteer	Student			High Risk (ED/PC SDS),Non Exempt
Leigh, Renee K		04/01/2010 08:00AM	Registered	04/01/2011
Volunteer	Other			Exempt
Lindsay, John E		03/04/2009 10:00AM	Registered	
Volunteer	Other			Young Members
Lockett, Patricia N		04/01/2010 08:00AM	Registered	04/01/2011
Volunteer	Other			Non Exempt
Lockett, Patricia N		07/01/2010 08:00AM	Registered	07/01/2011
Volunteer	Other			Non Exempt
Lucas, Angela H		03/04/2009 02:00PM	Registered	
Volunteer	Other			Young Members
Mack, Cameron J		03/04/2009 02:00PM	Registered	
Volunteer	Other			Young Members
Madison, Linda K		03/04/2009 10:00AM	Registered	
Volunteer	Other			Young Members
Martin, Louis N		03/04/2009 10:00AM	Registered	
Volunteer	Other			Young Members
Martinez, Sharon S		04/01/2010 08:00AM	Registered	04/01/2011
Volunteer	Other			Non Exempt
Mathieson, Jean T		03/04/2009 10:00AM	Registered	
Volunteer	Student			Young Members
Mcdonald, Stephanie M		02/01/2010 08:00AM	Registered	02/01/2011
Volunteer	Other			Non Exempt

Sample (roster)

Training class roster

Confidentiality/HIPAA **Start time: 08:00 AM** **Duration: 4:00** **02/01/2010**

General.Main Wing *Instructor: Roth, Erin M*

Max capacity: 25 Enrollment: 21

Alderson, Jack E
E-mail: Ja[illegible] ____________________

Anderson, Eli L
E-mail: Eli[illegible] ____________________

Artz, Jacquelyn K
E-mail: Ja[illegible] ____________________

Baker, Inez J
E-mail: Ine[illegible] ____________________

Barnes, Abby B
E-mail: Ab[illegible] ____________________

Blasko, Ryan L
E-mail: Ry[illegible] ____________________

Branson, Charles J
E-mail: Ch[illegible]m ____________________

Carr, Rufus V
E-mail: Ru[illegible] ____________________

Chin, Lucille G
E-mail: Lu[illegible] ____________________

Hayes, Marguerite A
E-mail: M[illegible]om ____________________

Johnson, Malco[illegible]
E-mail: M[illegible]m ____________________

Mcdonald, Stephanie M
E-mail: St[illegible]il.com ____________________

Meyer, Sandra C
E-mail: Sa[illegible] ____________________

Mitchell, Amanda M
E-mail: A[illegible]m ____________________

Patnode, Kelley C
E-mail: Ke[illegible] ____________________

Rogers, Candy R
E-mail: Ca[illegible] ____________________

Smith, Willie E
E-mail: Wi[illegible] ____________________

Stephenson, Karl L
E-mail: Ka[illegible]m ____________________

Thacker, Richar[illegible]
E-mail: Ri[illegible] ____________________

Thomas, Ellen J
E-mail: Ell[illegible] ____________________

Watson, David B
E-mail: [illegible] ____________________

Advanced Reporting Tools

GMS gives you a few advanced tools for working with reports:

- ***Calculated fields*** (page 106), used to transform actual data using one or more transformations.
- ***Report images*** (page 111), which let you consolidate common images used in your custom reports.
- ***Report image mappings*** (page 112), which are used to take an actual data field and convert it to an image based on that field's content.

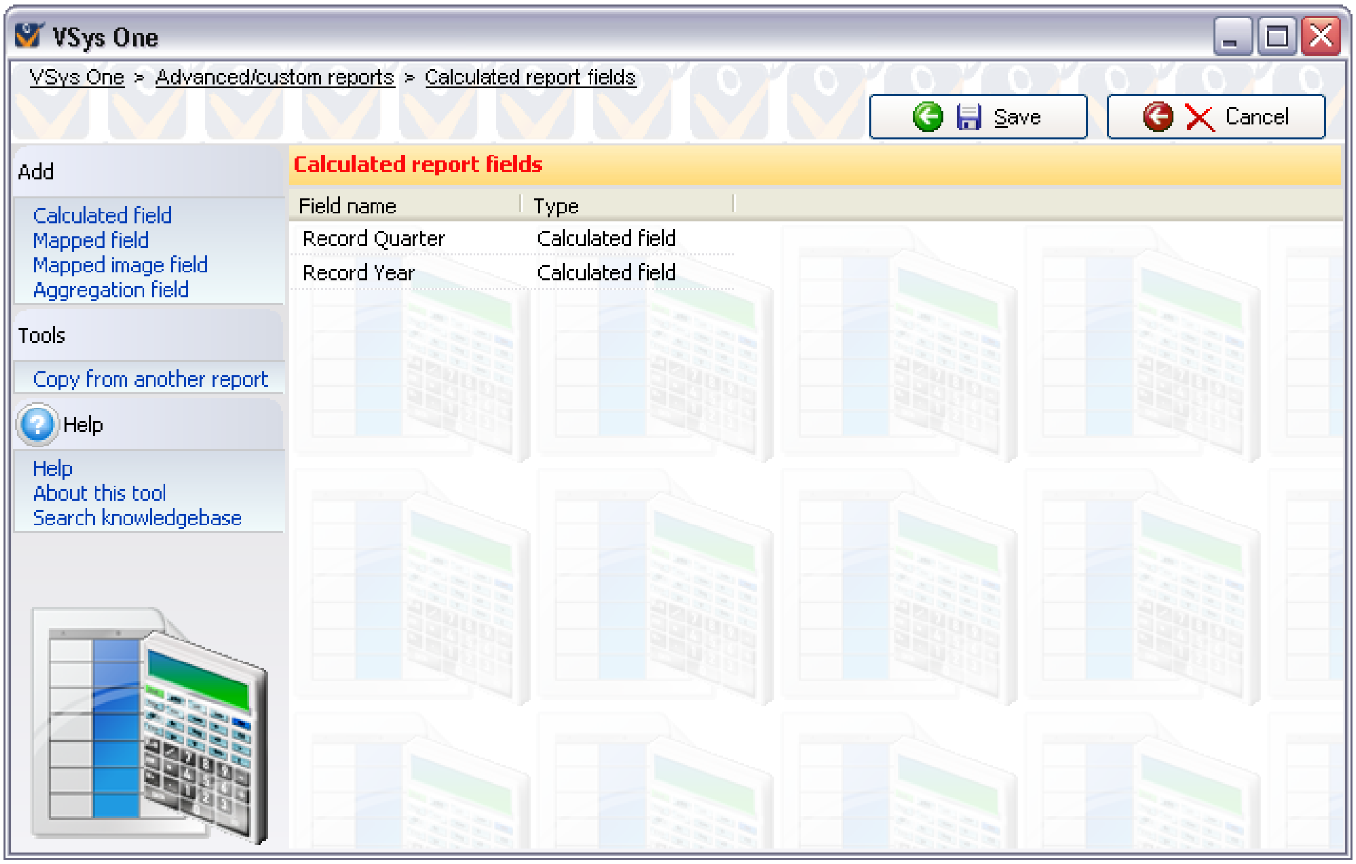
Calculated Fields

Concepts

Calculated fields are a powerful addition to GMS. They let you perform one or more operations on an existing, pre-defined data field before it's printed or used within a report. They are especially useful in Summary/crosstab reports as well as in other custom reports where you want to do page breaks and/or sorting on something other than the built-in fields. There are four different types of calculated field:

- Calculated field
- Mapped field
- Mapped image field
- Aggregation field

Define calculated fields by using the Add calculated fields link within the report.

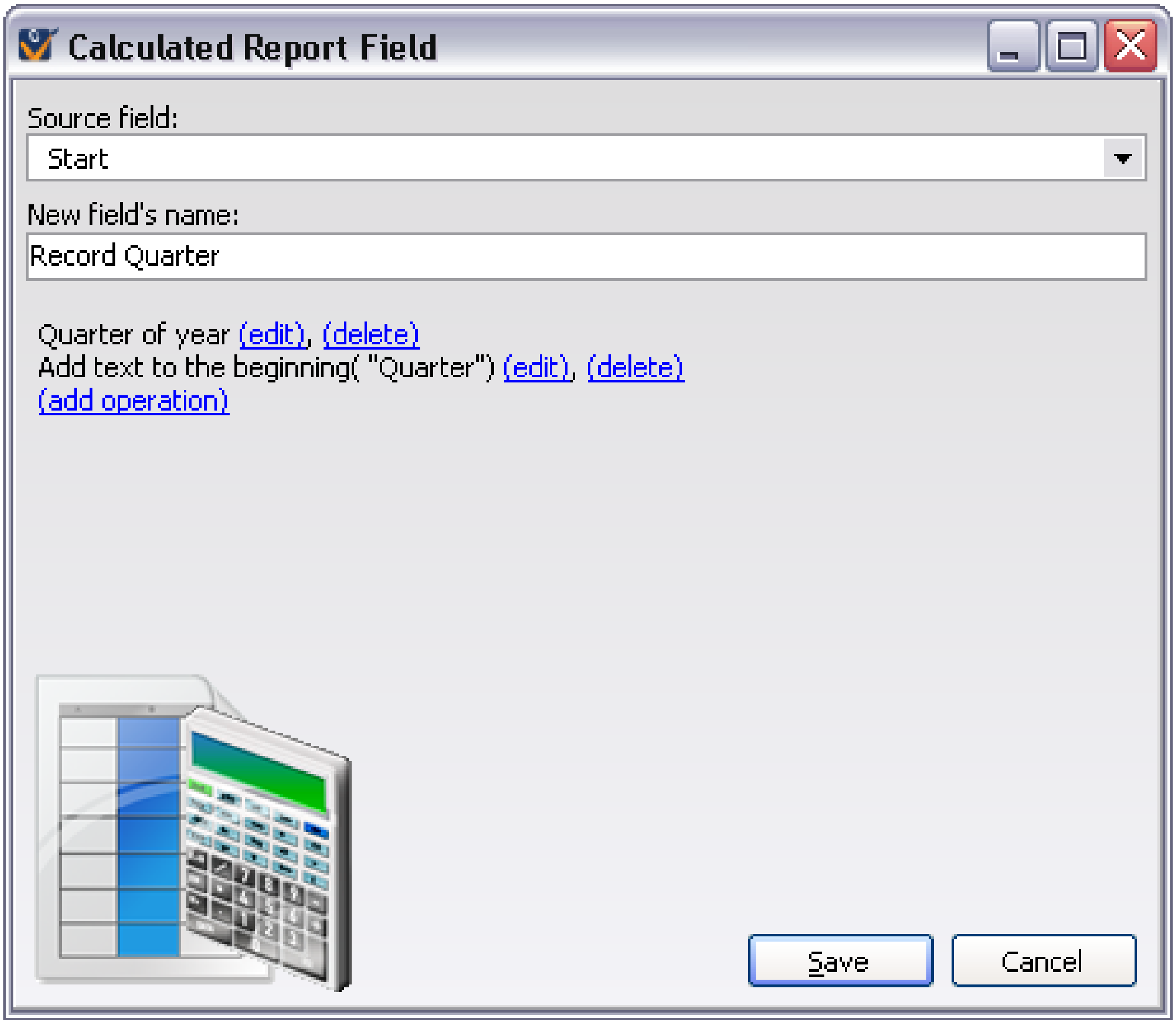


Edit a field by clicking on it, right-click on a field to edit or delete it, and click on the Add... links to define an all-new field.

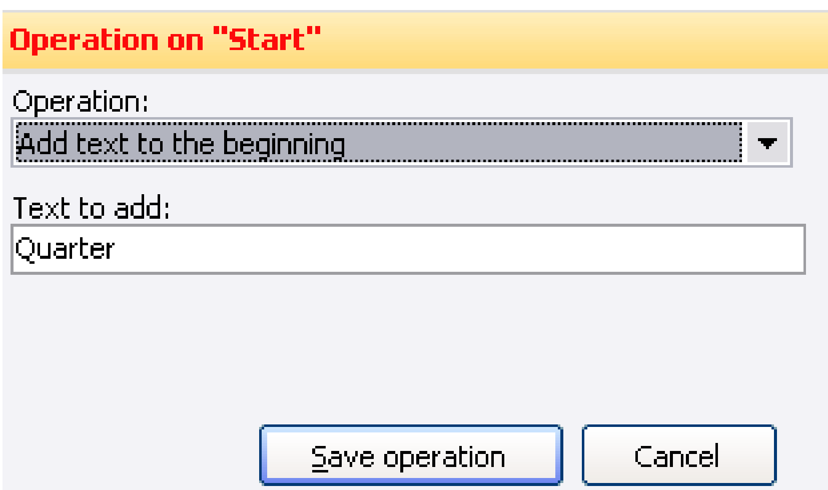
Calculated Field Operations

In the following example, a date field has two operations performed on it:

1. The date is replaced by the quarter of that date, e.g. "January 14, 2008" becomes "Q1 2008".
2. Text is added to the beginning of the field, e.g. "Q1 2008" becoming "Quarter: Q1 2008".



Any number of operations can be added here, and they're performed sequentially - one after the other - so the second operation gets the result of the first to work on.

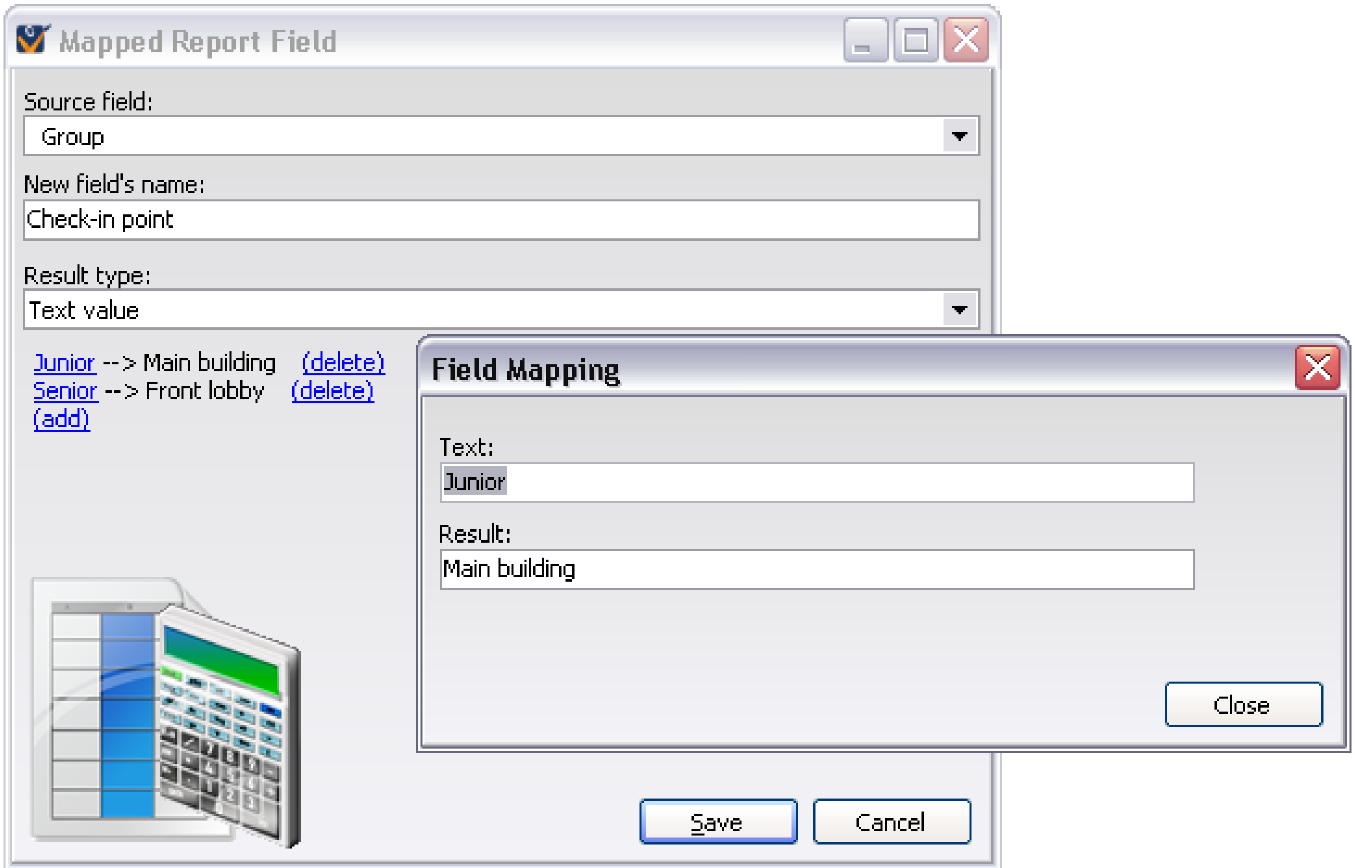


Most of the operations available here are self-explanatory.

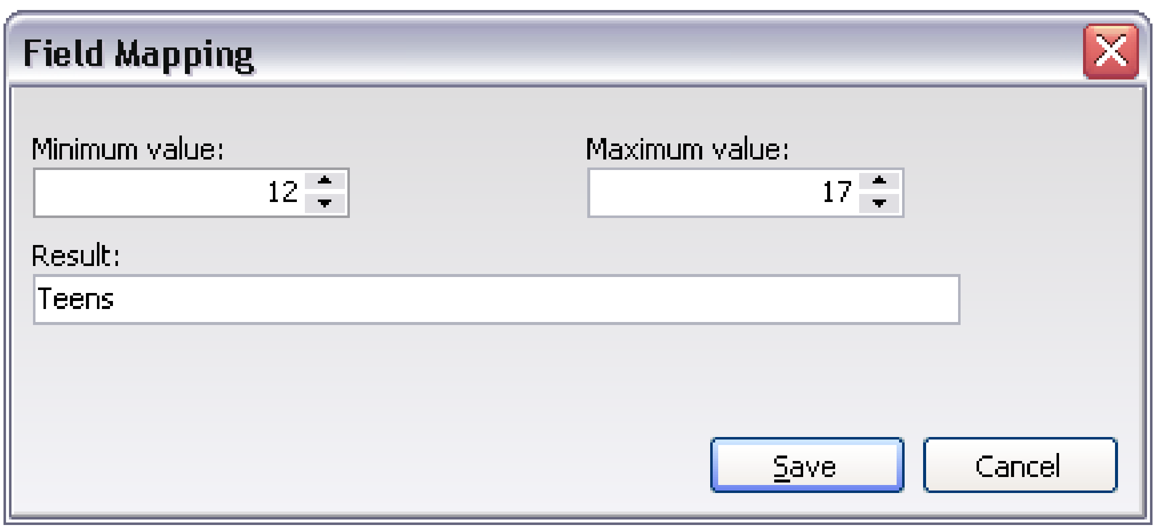
Operation	Action/Example
Add text to the end	
Add text to the beginning	
Convert to upper-case	"`Smith, Dale`" becomes "`SMITH, DALE`"
Convert to lower-case	"`Smith, Dale`" becomes "smith, dale"
Search & replace	Recursive replacement of text values; does not allow the replacement value to contain the source value.
Limit length of the text	If the text is longer than the number of characters you specify, it will be chopped off at the length you designate here.
Add years to a date	For all "Add XXX to a date", if the date is blank, no action is taken.
Add months to a date	
Add weeks to a date	
Add days to a date	
Day of week	e.g. "Monday"
Week of year	
Month of year	
Quarter of year	
Year portion of date	
Fiscal month of year	
Fiscal quarter of year	
Fiscal year of date	
Add/subtract number	
Multiply	
Divide	
Round a number	`14.5678`, `2` becomes `14.57` `143.56`, `-2` becomes `140`.
Truncate a number	`14.5678`, `2` becomes `14.56` `143.56`, `-2` becomes `140`.
Choose text based on the field being TRUE or FALSE	All three of these take a wide view of "True" and "False": "`1`", "`T`", and "`Y`" are TRUE, "`0`", "`N`" and "`F`" are FALSE.
Choose a number based on the field being TRUE or FALSE	
Choose a date based on the field being TRUE or FALSE	
Date portion of a date/time value	
Time portion of a date/time value	
Convert to mixed case	

Mapped Field

A mapped field looks up the existing field's value and determines what new value to use for itself.



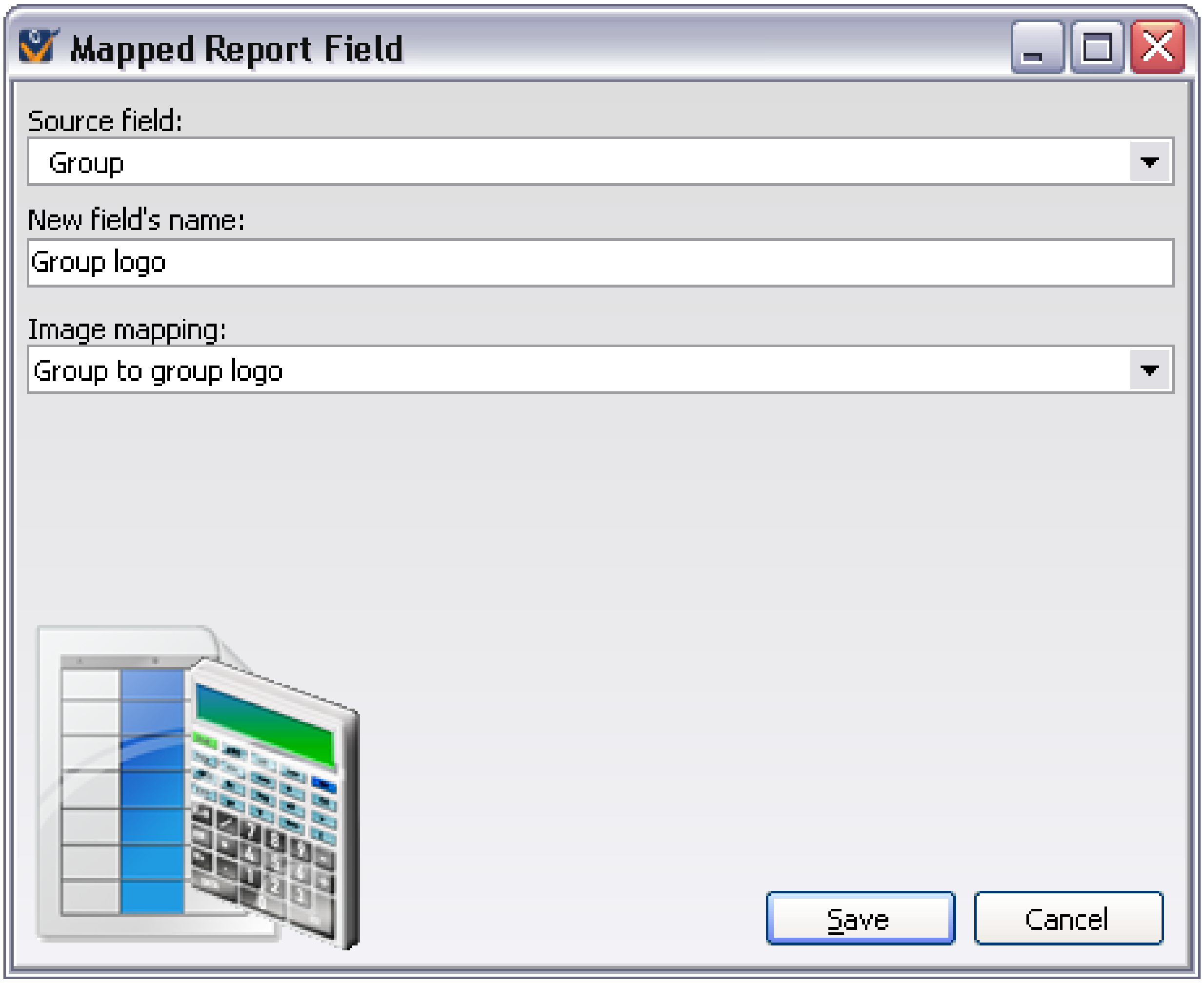
In the example above, if the person's GROUP contains the text "Junior", the new field CHECK-IN POINT will have the value "Main building". If it contains "Senior", the new field's value will be "Front lobby". You can have any number of mappings here, each defining the source value and a result value.



The mechanisms for mapping here will vary depending on the type of the source field: a numeric source field will have minimum/maximum numbers, a date source field will have minimum/maximum dates. Result types will vary as well, providing a way of entering the appropriate types of result values.

Mapped Image Field

Mapped fields take a value in one field and form their own date, number, or text value based on the source field's value. Mapped image fields do the same thing, but their result type is an image instead. These fields rely on ***Report Image Mappings*** (page 112) that you've previously defined.



Aggregation Field

An aggregation field combines the values of other fields together to make a single field for display. You'd often use this for combining images together. An aggregation field has one of two types: "Text value" or "Image".

GMS takes all of the fields that you add to the aggregation and evaluates each. It then takes all of the ones which are not blank and combines them together.

[insert image: aggregation report field definition for text fields]

[insert image: adding fields]

[insert image: aggregation report field definition for image fields]

RESULT TYPE	Text value or Image
MAXIMUM NUMBER OF VALUES TO DISPLAY	If this value is not zero, and more than this number of fields in the aggregation are not blank, GMS will show the IF TOO MANY VALUES PRESENT... result instead of combining the fields together.
IF TOO MANY VALUES PRESENT, SHOW	Used with MAXIMUM NUMBER OF VALUES TO DISPLAY

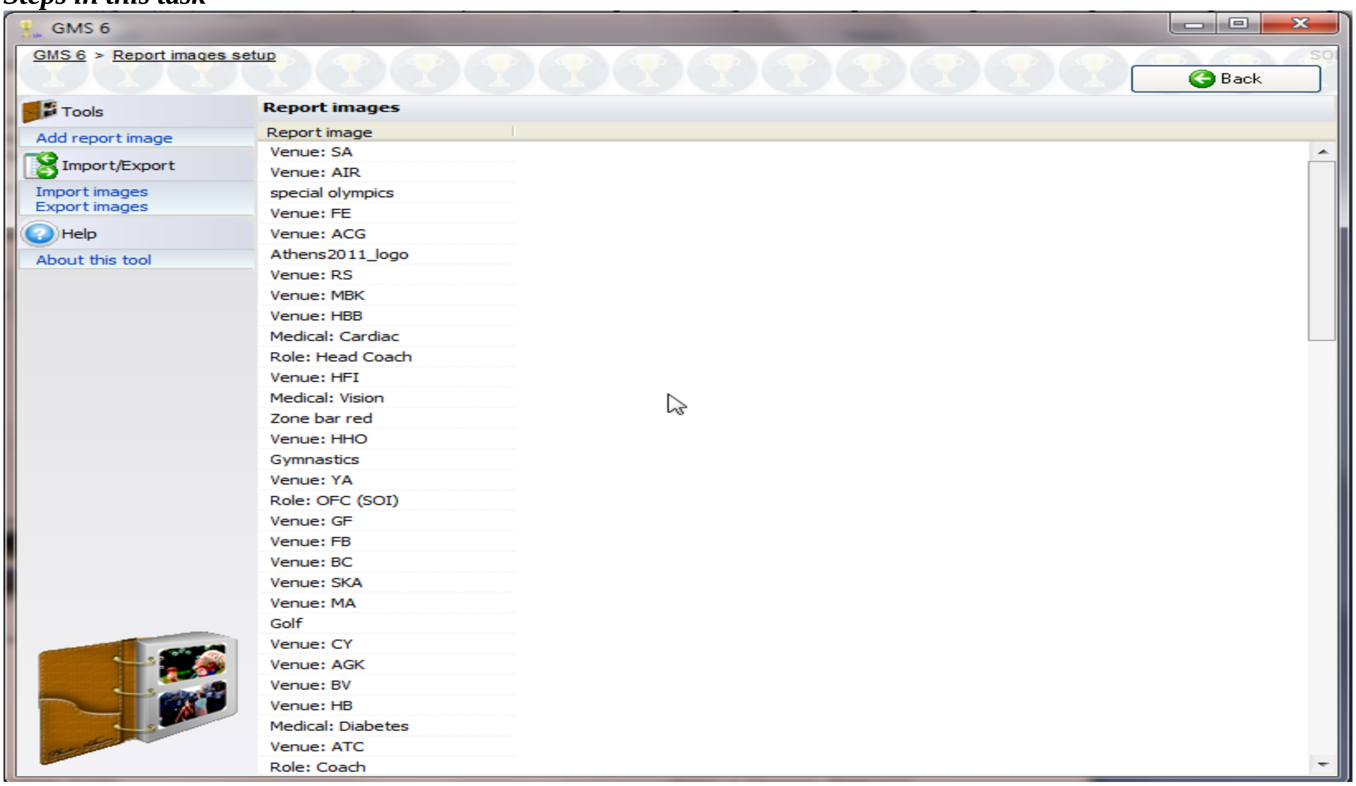
SUPPRESS DUPLICATE VALUES	When combining fields together, if the same result value is present in more than one field and this box is checked, GMS will only include that value once.
PIXELS BETWEEN ADJACENT IMAGES (IMAGE FIELDS ONLY)	Each image in the aggregation will be separated from the next by this many pixels in the result.
USE MULTIPLE ROWS OF IMAGES IF NEEDED (IMAGE FIELDS ONLY)	If checked, allows the images to flow into multiple rows.
MAXIMUM WIDTH OF COMBINED IMAGES (IMAGE FIELDS ONLY)	When USE MULTIPLE ROWS... is checked, if the combined images are wider than this value, the result will flow to a new row.
PIXELS BETWEEN ADJACENT ROWS (IMAGE FIELDS ONLY)	When USE MULTIPLE ROWS... is checked, the spacing between rows.
FIXED HEIGHT (IMAGE FIELDS ONLY)	When USE MULTIPLE ROWS... is checked, if this value is not zero, the result image will always be this many pixels high. Useful to ensure that images are stretchable without distorting their aspect ratio.
(add)	Adds one or more fields to the aggregation.

Report Images

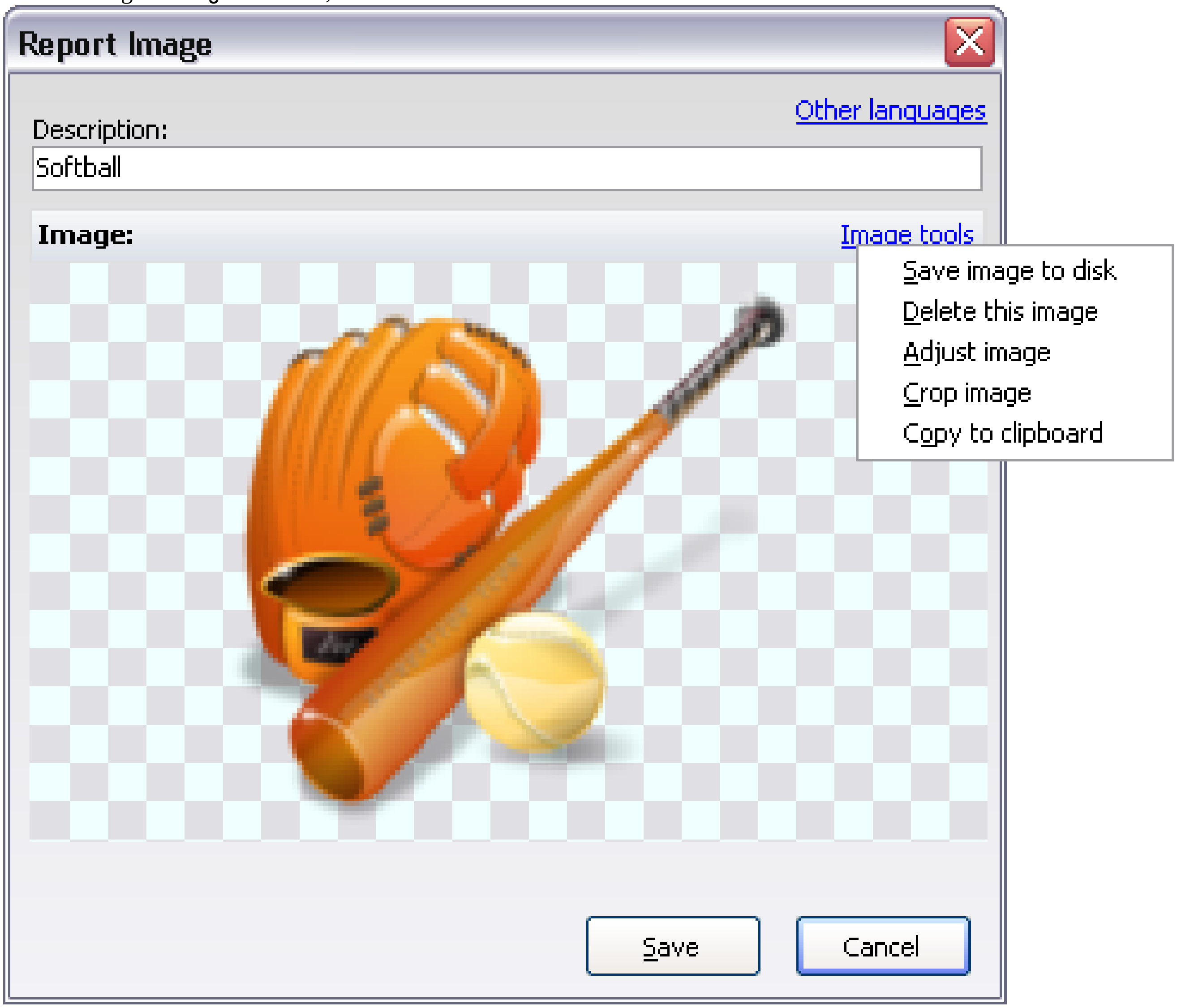
Concepts

Report images provide a place to define standardized images that you'll use in multiple reports using the ***Report images*** (page 129) data pipeline. These images can also be used by ***Report Image Mappings*** (page 112), which let you easily have images on reports vary from one person to the next based on various fields in the report.

Steps in this task



1. From the Setup panel, click on the Report images link.
2. To add a new image, click on the Add report image link. Describe the image and attach the image from a disk file or scanner using the Image tools link, then click **Save**.



3. Delete or work with images by right-clicking on them. Click the **Save** button to commit all of your changes.

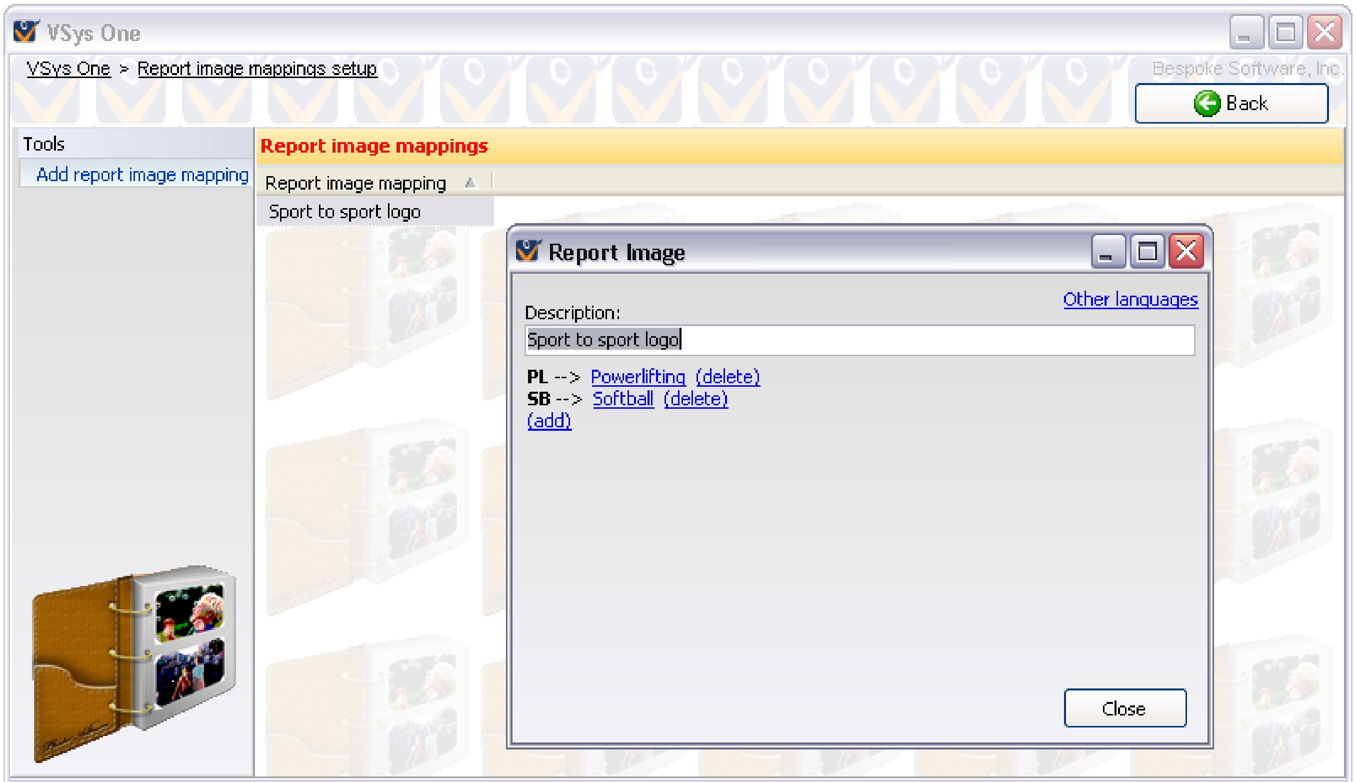
Report Image Mappings

Concepts

Report image mappings let you provide a place to define standardized images that you'll use in multiple reports. These images can also be used by ***Report Mapped Fields*** (page 109), which let you easily have images on reports vary from one person to the next based on various fields in the report.

There must first be images saved into Report Images before the Report Image Mappings menu choice will appear.

Steps in this task



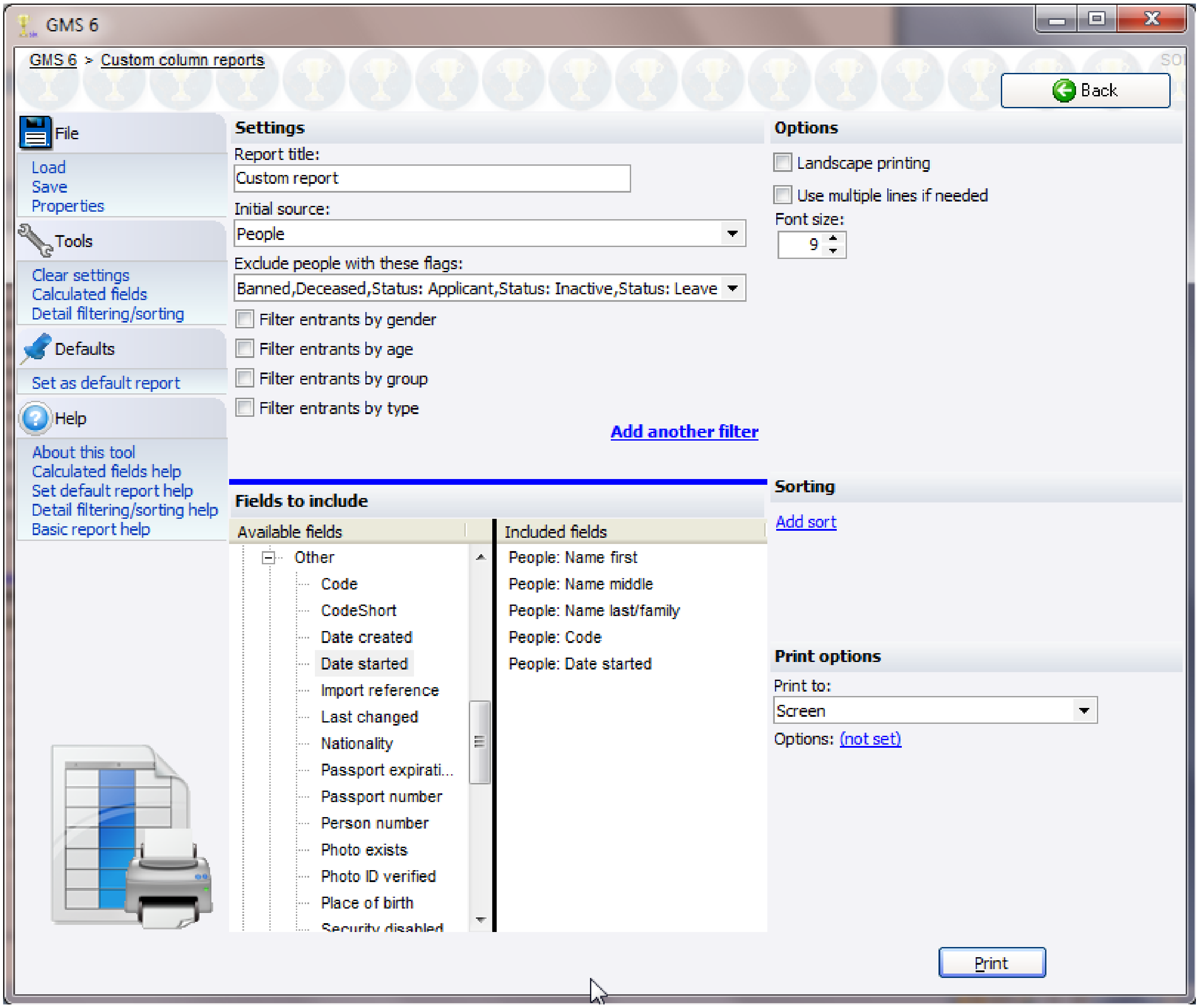
1. From the Setup panel, click on the Report image mappings link.
2. To add a new mapping, click on the Add report image mapping link.
3. Describe the image and use the hyperlinks to define the code to image mappings. These codes are the source values which, when found in the field you're mapping from (e.g. someone's sport), will result in GMS using the image you select.
4. Click the **Save** button to save the mapping.
5. Delete or edit mappings by right-clicking on them. Click the **Save** button to commit all of your changes.

Custom Column Reports

Custom Column reports get some of their features from ***custom reports*** (page 118), some from the ***advanced exporter*** (page 150), and some that are uniquely their own. Like custom reports, you can choose what information is displayed, define your own filters, and generally build the report from scratch. But instead of using the ***Report Designer*** (page 119), you drag-and-drop available fields onto the list of fields to be printed, and GMS handles formatting the report and sizing the columns.

Steps in this task

1. Click on the Custom Column link on the Reports panel.
2. Optionally, load a built-in or saved report by clicking on the appropriate link or click **Cancel** to close the report window and start from scratch.
3. Select the INITIAL SOURCE, which indicates the base data to be used. This may be people, certifications, trainings, or other records.
4. Set your filters. These will filter the records being printed (account records, certifications, memberships, etc.) and on the person associated with that record.
5. Use the Add another filter link to add any additional filters.
6. Choose LANDSCAPE PRINTING to have GMS rotate the paper so it's wider than it is tall.
7. Check USE MULTIPLE LINES IF NEEDED to have the fields wrap into multiple lines for each record. If this is checked and GMS does wrap fields, it will include a line between each record to make the report easier to read.
8. Select a font size.
9. Set your address criteria, if needed. Choose which address types are preferred by setting an order here, and include (any) as the last fallback address type if you want the letter to go to any valid address even if it's not selected here. Then include or exclude incomplete addresses (those missing one or more of an address line, city, state and zip/postal code), and whether people who don't have an applicable address should be excluded or included.
10. Set your sort criteria.
11. Choose the fields to be printed. This involves scrolling through the list of pipelines, and the fields in them, on the left, then dragging those fields to the right.
    Re-arrange fields by dragging them up or down on the list.
    Remove a field by dragging it back to the left side.
12. Edit the title, width, or alignment of any field by right-clicking on it and selecting Edit.
13. Choose the printer or special device to send the report to.
14. Click the **Print** button to run the report.


GMS 6
GMS 6 > Custom column reports
Back
File
Load
Save
Properties
Tools
Clear settings
Calculated fields
Detail filtering/sorting
Defaults
Set as default report
Help
About this tool
Calculated fields help
Set default report help
Detail filtering/sorting help
Basic report help
Settings
Report title:
Custom report
Initial source:
People
Exclude people with these flags:
Banned,Deceased,Status: Applicant,Status: Inactive,Status: Leave
Filter entrants by gender
Filter entrants by age
Filter entrants by group
Filter entrants by type
Add another filter
Options
Landscape printing
Use multiple lines if needed
Font size:
9
Fields to include
Available fields
Included fields
Other
Code
CodeShort
Date created
Date started
Import reference
Last changed
Nationality
Passport expirati...
Passport number
Person number
Photo exists
Photo ID verified
Place of birth
Security disabled
People: Name first
People: Name middle
People: Name last/family
People: Code
People: Date started
Sorting
Add sort
Print options
Print to:
Screen
Options: (not set)
Print

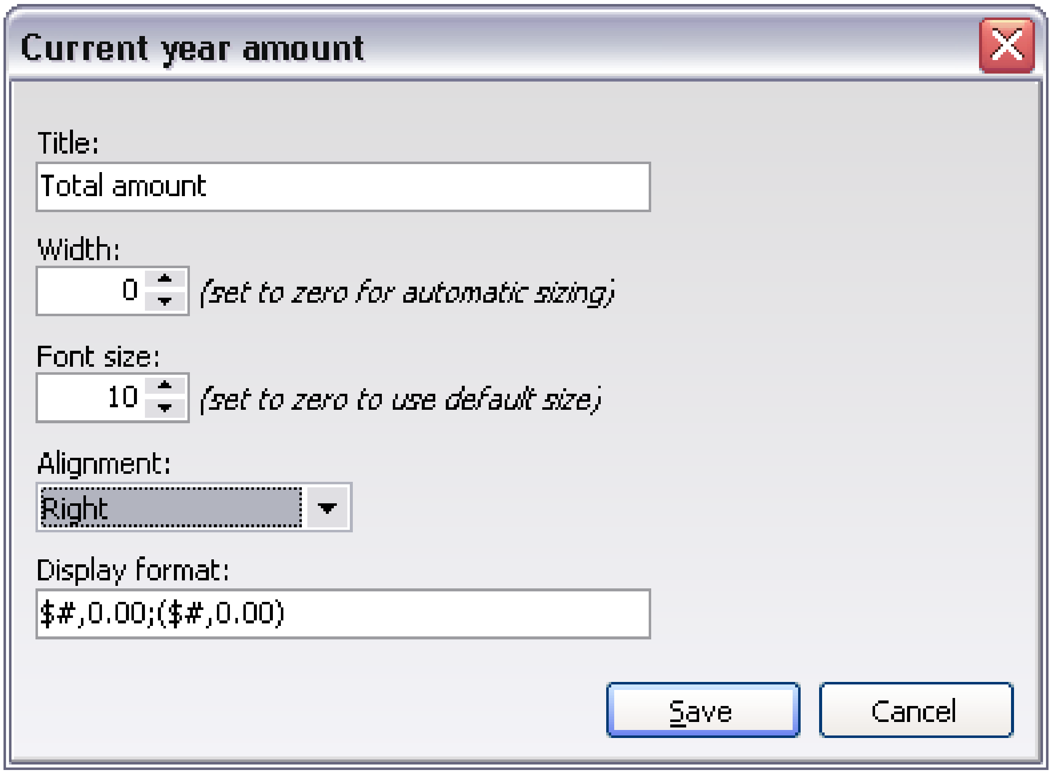
Sample: Trainings in 2009

Trainings

Name	Subject	Start	Location	Instructor name
Adams, Michelle R	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Adams, Michelle R	Confidentiality/HIPAA	03/04/2009 02:00PM	General	
Adams, Michelle R	Mission/SHARE	03/02/2009 12:00PM	General	
Adams, Michelle R	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Allen, Leticia L	Mission/SHARE	03/02/2009 12:00PM	General	
Allen, Leticia L	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Allen, Leticia L	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Amis, Lorraine G	Mission/SHARE	03/02/2009 12:00PM	General	
Amis, Lorraine G	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Amis, Lorraine G	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Anderson, Eli L	Mission/SHARE	03/02/2009 12:00PM	General	
Anderson, Eli L	Confidentiality/HIPAA	03/04/2009 10:00AM	General	Roth, Erin M
Anderson, Eli L	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Anderson, Eli L	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Artz, Jacquelyn K	Sales 101	06/12/2009 08:00PM	General	Roth, Erin M
Bell, Jim K	Rescue Breathing	03/05/2009 03:00PM	General	Chevrette, Michael
Bell, Jim K	Confidentiality/HIPAA	03/04/2009 10:00AM	General	Roth, Erin M
Billiot, Carla C	Confidentiality/HIPAA	03/04/2009 10:00AM	General	Roth, Erin M
Billiot, Carla C	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Billiot, Carla C	Mission/SHARE	03/02/2009 12:00PM	General	
Billiot, Carla C	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Boden, John O	Sales 101	06/12/2009 08:00PM	General	Roth, Erin M
Bonilla, Joann E	Mission/SHARE	03/02/2009 12:00PM	General	
Bonilla, Joann E	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Bonilla, Joann E	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Boswell, Mary W	Rescue Breathing	03/05/2009 03:00PM	General	Chevrette, Michael
Bourg, Benito J	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Bourg, Benito J	Rescue Breathing	03/05/2009 03:00PM	General	Chevrette, Michael
Bourg, Benito J	Mission/SHARE	03/02/2009 12:00PM	General	
Braithwaite, Eva R	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Braithwaite, Eva R	Confidentiality/HIPAA	03/04/2009 02:00PM	General	
Braithwaite, Eva R	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Braithwaite, Eva R	Mission/SHARE	03/02/2009 12:00PM	General	
Braun, Callie B	Mission/SHARE	03/02/2009 12:00PM	General	
Braun, Callie B	Confidentiality/HIPAA	03/04/2009 10:00AM	General	Roth, Erin M
Braun, Callie B	Rescue Breathing	03/05/2009 03:00PM	General	Chevrette, Michael
Brown, Myles M	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Brown, Myles M	Confidentiality/HIPAA	03/04/2009 10:00AM	General	Roth, Erin M
Brown, Myles M	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Brown, Myles M	Mission/SHARE	03/02/2009 12:00PM	General	
Calvin, Anthony F	Sales 101	06/12/2009 08:00PM	General	Roth, Erin M
Caswell, Robert K	Confidentiality/HIPAA	03/04/2009 02:00PM	General	
Caswell, Robert K	Rescue Breathing	03/05/2009 03:00PM	General	Chevrette, Michael
Childs, Toshia J	Confidentiality/HIPAA	03/04/2009 02:00PM	General	
Childs, Toshia J	Rescue Breathing	03/05/2009 03:00PM	General	Chevrette, Michael
Clark, Jessie K	Mission/SHARE	03/02/2009 12:00PM	General	
Clark, Jessie K	Sales 101	06/12/2009 08:00PM	General	Roth, Erin M
Clark, Jessie K	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Clark, Jessie K	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Clark, Jessie K	Confidentiality/HIPAA	03/04/2009 10:00AM	General	Roth, Erin M
Clay, Marc N	Safety	03/05/2009 04:30PM	General	Roth, Erin M
Clay, Marc N	Rescue Breathing	03/05/2009 09:00AM	General	Chevrette, Michael
Clay, Marc N	Confidentiality/HIPAA	03/04/2009 10:00AM	General	Roth, Erin M
Clay, Marc N	Mission/SHARE	03/02/2009 12:00PM	General	
Cobos, Daniel C	Sales 101	06/12/2009 08:00PM	General	Roth, Erin M
Cole, Cody S	Safety	03/05/2009 04:30PM	General	Roth, Erin M

Custom Column Report Formats

Double-click on any selected field in a custom column report to specify your own formatting for that field.



TITLE	If not blank, the value you enter here will be printed at the top of the appropriate column instead of the field's name.
WIDTH	Overrides the default field width (in inches).
FONT SIZE	Overrides the default font size.
ALIGNMENT	Sets how the data in this field is aligned: left, right or centered.
DISPLAY FORMAT	Use any valid display format (see *Display Formats* (page 131) under Advanced/Custom Reports (page 118) for more details).

Advanced/Custom Reports

Tip: Some of the features and concepts introduced here are very advanced, and may not be needed by most people. Odds are, most of the reports you need are either built-in or you can make trivial modifications to a built-in report to get what you need. If you need help with some of the more in-depth features of custom reports, please contact our support team for assistance.

Concepts

Custom reports are a powerful concept and are the basis for many other reports in GMS. These reports in GMS are not "magical", they're just regular reports that any user can open, change, re-arrange, or create entirely from scratch. Custom reports start with their TYPE OF REPORT, which is the source of the data that's used as its basis.

Steps in this task

1. Click on the Advanced/Custom link in the Reports panel.
2. The **Select saved report** box will open listing the already-available reports. Choose one of these as the basis for your report or click the load from a file link to open a report elsewhere on your computer. Click the **Cancel** button to close the window and go to a new, blank report.
3. Select the TYPE OF REPORT, which indicates the base data to be used.
4. Set your address filters.
5. Choose your SOURCE CRITERIA. Your options here will vary widely depending on whether you're working from within a Games and what your report basis is.
6. Use the Design report link to change the contents of the report itself.
7. Choose the printer or special device for the report.
8. Click the **Print** button to run the report.

For more information about source data and data pipelines, see the section *Pipelines* (page 121).

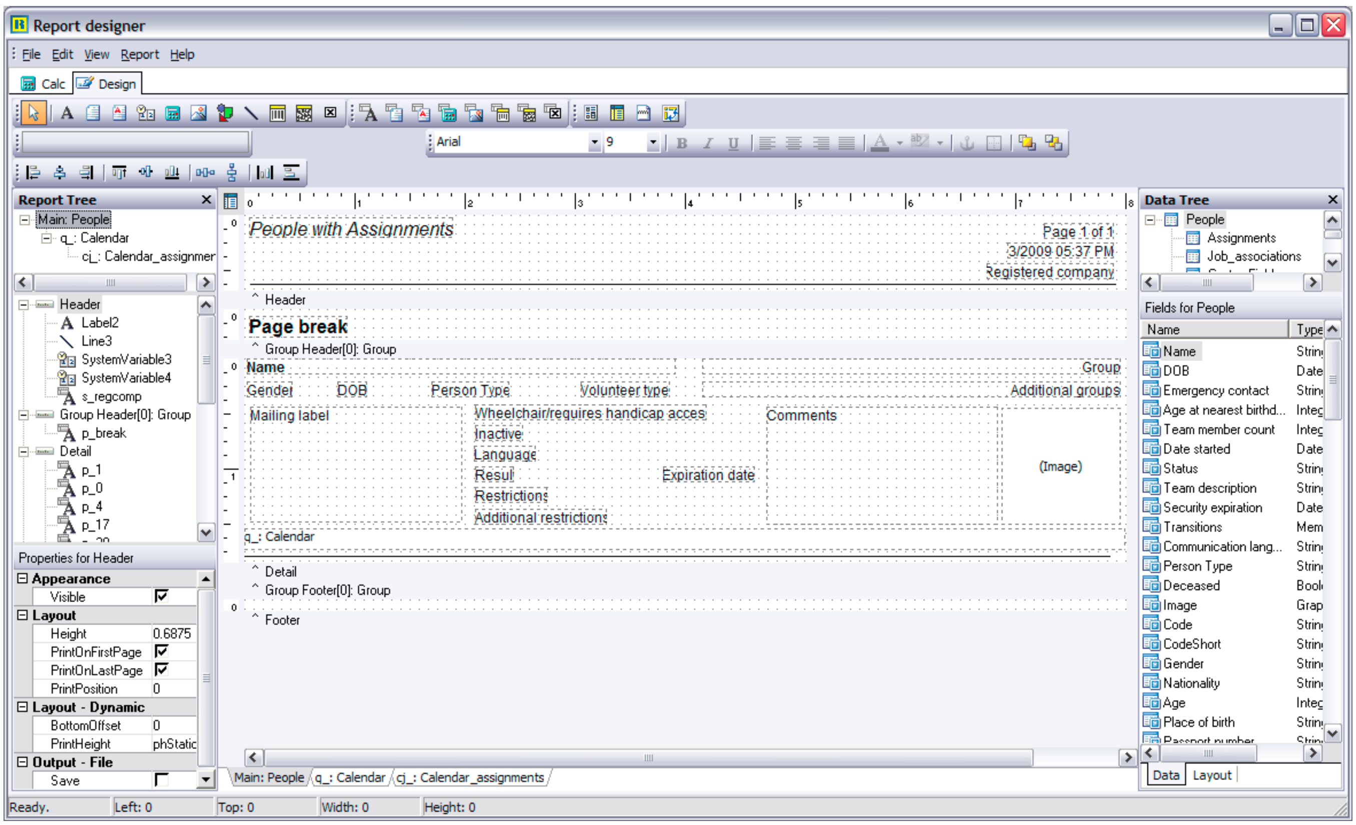
Types of Reports

Type	Criteria, primary pipeline	Other attributes
Certifications	Certifications, and certifications are the type of data in the primary pipeline	All other pipelines refer to attributes of the person who owns the certification in the primary pipeline. A person may appear in this report more than once if he has more than one certification which meets your criteria.
Comments *global only*	Comments	All other pipelines refer to attributes of the person who owns the comment in the primary pipeline.
Credentials *global only*	Credentials	All other pipelines refer to attributes of the person for whom the credential in the primary pipeline was printed.
Custom application forms	Custom application forms	All other pipelines refer to attributes of the person associated with the application in the primary pipeline.
Delegations *only in a Games*	Delegations	All other pipelines refer to attributes of the delegation in the primary pipeline.
People	People, and people are the type of data in the primary pipeline	All other pipelines refer to attributes of the current person in the primary pipeline. A person will appear in this report only once.
People on one or more lists *global only*	People, and people are the type of data in the primary pipeline	All other pipelines refer to attributes of the current person in the primary pipeline. A person will appear in this report only once.
Games	Games, and Games are the	All other pipelines refer to attributes of the current Games

global only	type of data in the primary pipeline	in the primary pipeline. A Games will appear in this report only once. This report has no people - it's information about Games only.
Trainings *global only*	Training records - these are the entries of people into training courses, or records of a person's trainings	All other pipelines refer to attributes of the owner of the training record in the primary pipeline.
Training courses *global only*	Training courses, these are the scheduled classes (instances of a training at a specific date, time, location and subject)	All other pipelines refer to attributes of the owner of the training course in the primary pipeline. You can't access a training course's entrants in a report of this type.

Report Designer

The report designer is where you place your fields, define your groups and subreports, and generally lay out how your report will look and its contents.

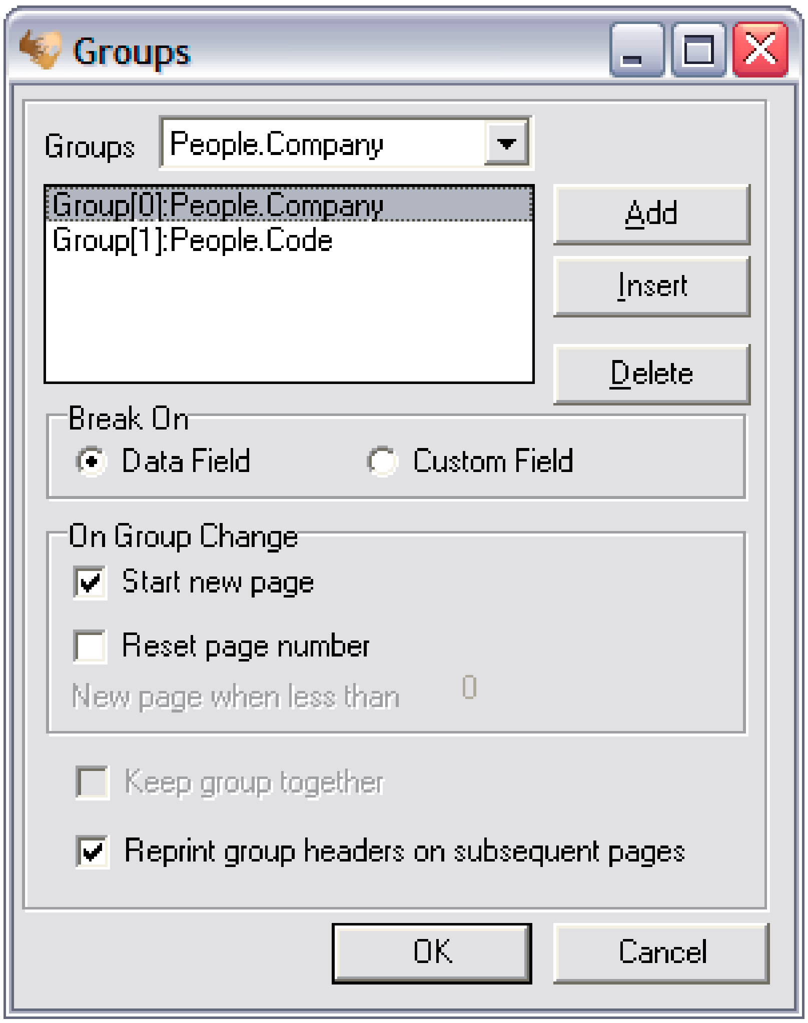


Report Groups

You can place groups into your custom report to organize your data. Each group has its own header and footer, and the header and footer are only printed once for each unique value as the report goes through the pipeline. For example, in a report based on Individual hours where you want them organized by delegation, you'd make a report group based on "Delegation" and put the delegation's data in the header of the report. In the body of the report, include the hours fields you need. Then in the footer of that group, if you want totals, place calculated fields to total the hours for that delegation. To place overall totals, put calculated fields in the footer of the report itself.

Tip: ***Subreports*** (page 131) are full-fledged reports of their own, and can have their own groups within them.

Create and edit report groups from the Groups... menu item on the Reports menu.



Field name	Description
GROUPS	To make a new group, first click on the **Add** or **Insert** button then use this to set the pipeline and field for the group.
BREAK ON	"Custom Field" here does not mean a GMS custom field, and generally you'll have no use for it here.
START NEW PAGE	If checked, when this field value changes, a new page will be started.
RESET PAGE NUMBER	If checked, when a new page is forced by a field value change, the page number will be set to "1".
NEW PAGE WHEN LESS THAN	If less than this many inches/centimeters are left after the group is finished printing, GMS will skip to a new page.
KEEP GROUP TOGETHER	If a group would cross a page boundary, GMS will force a page break before the group to

	try to keep the group on a single page if this is checked.
REPRINT GROUP HEADERS ON SUBSEQUENT PAGES	If a group crosses a page boundary, and this is checked, the group's headers will print at the top of every page that the group prints on.

Tip: Groups don't sort your data. If you define groups like Delegation, Role then Name, but you sort the data by name only, you'll find some very odd report results.

Deleting a group also deletes all fields in the header and footer of that group.

Labels and Fields

You can place numerous types of fields and labels within the body, header, footer, and groups of a custom report. Click on these items on the top toolbar and then in the report body, header or footer to place them in the report.

Labels are static, meaning that they are not connected to a ***pipeline*** (page 121) or a specific field.

A text label with the caption you enter.

A memo field (multiple lines) with the caption you enter.

A formatted memo field (multiple lines) with the caption you enter.

A system variable: date, date/time, document name, print date/time, page count, page set, page set desc (e.g. "Page 1 of 4"), page no (e.g. "1" as a page number), page no desc (e.g. "Page 1"), time.

A calculated field where you can define your own formula.

A picture that you load from a disk file.

A rectangle, square, rounded rectangle, rounded square, ellipse or circle.

A vertical or horizontal line.

A barcode made from text that you enter.

Fields are connected to a ***pipeline*** (page 121) and data field, and they display the values of fields in pipelines.

A text field from a field in a pipeline.

A memo field (multiple lines) from a field in a pipeline.

A formatted memo field (multiple lines) from a field in a pipeline.

A calculated field based on data from a field in a pipeline (count, sum, minimum, maximum, or average).

A picture from a field in a pipeline.

A barcode made from a text field in a pipeline.

Right-click on a label or field to bring up a menu of useful settings. The available settings vary based on the type of label or field.

Tip: Most fields should be set to `AutoSize.` This allows them to grow and contract to fit the data within them. Right-click on the label or field to set this option.

Pipelines

Pipelines are full of records, and they're all linked together by a common element: the record in the primary pipeline. Think of pipelines as tables in a database, all joined using common keys. Every field and sub report has a pipeline associated with it. For fields, it indicates where the field gets its data, and limits the fields that can be selected. For sub reports, the pipeline forms the basis of the sub report, and the contents of the sub report are repeated once for every record in its pipeline.

We have a whole series of pipelines available to us, plus one more for every type of certification defined.

For fields where the meaning is obvious from its description, we've left the description blank.

Addresses report pipelines (various)

There are four address pipelines available:

- "Address" - single element: the one address that was selected by your criteria, blank if none met them.
- "All addresses" - zero or more items: all valid addresses for this person except for emergency addresses.
- "Emergency addresses" - zero or more items: all valid emergency addresses for this person.
- "Organization address" - single element: address information for this organization as defined in System preferences.

Field	Description or sample
CITY	`Clifton Park`
CITY/STATE/POSTAL	`Clifton Park, NY 12065`
CITY/STATE/ZIP	`Clifton Park, NY 12065`
COMMENTS	
CONTACT NAME	John Doe
COUNTRY	`USA`
COUNTY	`Saratoga` (automatically calculated, using the "zips" table, based on the ZIP CODE/POSTAL CODE)
E-MAIL	`info2@bespoke.com`
LINE 1	`PO Box 4406`
LINE 2	`Department 14`
LINE 3	
LINE 4	
LINE 5	
LINE 6	
LINES	`PO Box 4406` `Department 14`

MAILING LABEL	`Dale Smith`
	`PO Box 4406`
	`Department 14`
	`Clifton Park, NY 12065`

MAILING LABEL (CANADIAN)	`Dale Smith`
	`PO Box 4406`
	`Department 14`
	`Clifton Park, NY`
	`12065`

PHONE HOME, PHONE WORK, PHONE MOBILE, PHONE FAX, PHONE NA, PAGER	One phone number of the selected type.
CONTACT NAME	`Dale Smith`
PHONES	All phone numbers for this person.
POSTAL	`12065`
PRIMARY	True if this is the person's primary address.
PROVINCE	`NY` (contains the same value as the STATE field)
STATE	`NY`
TYPE	`Business`
VALIDITY	`January 4-April 15`

ZIP CODE	12065

Certifications report pipelines

There can be from one to dozens of pipelines of certifications available here depending on how many certifications you have created in GMS.

1. For any given person, there will be one pipeline for each type of certification defined in GMS which is not marked as disabled, and the pipeline will be named with that certification's name. The fields in this pipeline will vary and represent the fields in that specific certification. These pipelines will have one record for every certification of that type the person has.
2. "All certifications": this contains one record for every certification the person has, with all types in this one pipeline.
3. "Certification": only for reports based on certifications, contains the current certification.

For "All certifications" and "Certifications" there is a common list of fields available. Note: the field names here may not match the fields in the specific certifications. GMS lets you map actual fields in the certification's definition to these virtual, reportable fields which are available for all certification types. See the ***certification definition tools*** (page 29) for more information about this, especially on including data in the OTHER INFO field.

Field	Description
EFFECTIVE DATE	
EXPIRATION DATE	
DESCRIPTION	The name of the type of this certification.
OTHER INFO	

Comments report pipeline

Information about a comment. If the report's basis is comments, it's the comments that met your criteria. Otherwise, it's a list of comments for the current person. In both cases, there will be zero or more records in this pipeline.

Field	Description or sample
DETAILS	Text of the comment.
DETAILS (PLAIN TEXT)	Text of the comment with all formatting removed.
DATE	Date the comment was added.
IMAGE	Any image associated with this comment. Note: you must use a DBIMAGE field in a custom report to display any images.
KIND	Type of comment, e.g. "General".
TIMESTAMP	Date and time the comment was added.

Credentials report pipeline

Information about a printed credential.

Field	Description or sample
CANCELLED	TRUE if the credential was cancelled after issuing, otherwise FALSE.
CODE	16 digit internal ID code for the credential.
DESCRIPTION	Description of the credential, generally the name of the template used to generate it.
EXPIRATION	If present, the credential is not valid past this date.
OWNER	16 digit ID code of the person for whom the credential was printed.

PRINTED	Date the credential was printed.
VALID	TRUE if the credential has not been cancelled and its expiration date has not yet been reached.

Custom fields report pipelines

Custom fields

Single element pipeline, the fields here represent the various defined custom fields associated with the current person. There will be one field in this pipeline for each of the reportable custom fields.

All custom fields

Multi-element pipeline with one record for each of the reportable custom fields.

Field	Description
DESCRIPTION	Name of the custom field.
VALUE	Associated value for this custom field.

People report pipeline

This is by far the biggest pipeline, containing everything you'd ever want to know about a person.

Field	Description or sample
MATCH SIMILARITY	(not used here)
NAME	`Cornett, William S. III`
NAME (NATURAL)	`William S. Cornett III`
NAME (NATURAL) WITHOUT MIDDLE INITIAL	`William Cornett`
NAME PREFIX/TITLE	`Mr.`
NAME WITH PREFIX/TITLE	`Mr. William S. Cornett III`
NAME FIRST	`William`
NAME MIDDLE	`S`
NAME MIDDLE INITIAL	`S`
NAME LAST/FAMILY	`Cornett`
NAME LAST/FAMILY INITIAL	`C`
NAME FIRST AND LAST/FAMILY	`Mr. William Cornett`
NAME SUFFIX	`III`
MAILING TITLE	`Mr. Cornett`
MAILING ALL NAMES	The MAILING TITLE field if present, otherwise the NAME WITH PREFIX/TITLE value.
MAILING DEAR	`Bill`
MAILING COUNT	(not used here)
COMPANY	`Bespoke Software, Inc.`
ALTERNATE NAME	`Boss, Big`
ALTERNATE NAME (NATURAL)	`Big Boss`
ALTERNATE FIRST NAME	`Big`

ALTERNATE MIDDLE NAME	
ALTERNATE FAMILY/LAST NAME	`Boss`
ALTERNATE NAME SUFFIX	
HE/SHE/THEY	`He`
HE/SHE/THEY (LOWER CASE)	`he`
SOUNDS LIKE (PHONETIC) NAME	`KOR-net, WILL-yum`
SOUNDS LIKE (PHONETIC) NAME (REVERSED)	`WILL-yum KOR-net`
TEAM	`Y`
TEAM NAME	`Bespoke's Big Individualing Team`
TEAM MEMBER COUNT	`8`
TEAM DESCRIPTION	
GENDER	`Male`
GENDER (SHORT)	`M`
PERSON TYPE	`Individual`
ACTIVE DATE	`04/12/2008`
ACTIVE STATUS	`Leave of absence`
ALL PERSON TYPES	`Individual,Staff`
ADDITIONAL TYPES	`Staff`
ALL SUPERVISORS	GMS goes and finds all supervisors associated with this person from assignments, job associations and hours.
INDIVIDUAL TYPE	`General`
GROUP	`Daily Individuals`
ADDITIONAL GROUPS	`Troublesome Individuals,Donors`
ALL GROUPS	`Daily Individuals,Troublesome Individuals,Donors`
INDIVIDUAL SOURCE	`Billboard`
JOB PREFERENCES	`Outdoor work,Computer work`
LANGUAGE	`English`
COMMUNICATION LANGUAGE	`English`
ADDITIONAL LANGUAGES	`Bad English`
AVAILABILITY	`Jan-June 2009 12pm-6pm, Monday,Tuesday,Thursday`
SKILLS	`Computer,Cats,Wrangling children`
SPECIAL REQUESTS/NEEDS	`Cattle prod`
CONTACT FLAGS	`Do not e-mail,Do not spindle`
DOB	`03/01/1970` (not my real DOB!)
DOB YEAR	`1970`
DOB MONTH	`03`
DOB MONTH NAME	`March`
BIRTHDAY	`03/01`

AGE	`40`
AGE AT NEAREST BIRTHDAY	Used primarily for birthday greetings, which are often sent or seen before the recipient's actual birthday. This is their age at the birthday the shortest distance from today's date.
DECEASED	`N`
DECEASED DATE	
INACTIVE	`N`
INACTIVE DATE	
INACTIVE REASON	
INACTIVE FOLLOWUP DATE	
YEARS SINCE FIRST ACTIVE	`12`
RE-ACTIVE DATE	`08/01/2008`
PLACEHOLDER	`N`
ARCHIVED	`N`
ARCHIVED DATE	
ARCHIVED REASON	
ARCHIVED COMMENT	
BANNED	`N`
BANNED COMMENTS	
BANNED REASON	
BANNED EXPIRATION	
WHEELCHAIR/REQUIRES HANDICAP ACCESS	`N`
MEDICAL ALERT	`Allergic to hard work.`
DIET ALERT	`No vegetables.`
EMERGENCY CONTACT	Only here for backwards compatibility, use the person's "Emergency contact" address instead for this purpose.
NATIONALITY	`USA`
PLACE OF BIRTH	`Bronx, NY`
PASSPORT NUMBER	`123456789`
PASSPORT EXPIRATION DATE	`02/15/2010`
PHOTO ID VERIFIED	The last date their ID was verified.
CODE	16-digit internal ID code for this person.
CODE SHORT	The "Basic" or 5-digit ID code.
SECURITY USER ID	`wcornett`
SECURITY DISABLED	`N`
SECURITY EXPIRATION	
PERSON NUMBER	
IMPORT REFERENCE	ID from previous database, e.g. a IndividualWorks number.
LAST CHANGED	`08/13/2009`
DATE CREATED	`02/01/2001`

DATE STARTED	`02/18/2001`
STATUS	`Active`
TRANSITIONS	Details all transitions between active, inactive, banned, archived, deceased, and any imported from IndividualWorks.
UPCOMING RECURRING ASSIGNMENTS	Describes the rules for all active recurring assignments.
IMAGE	
WEB USER ID	`wcornett@bespoke.com`
WEB DISABLED	`N`
WEB NEEDS ACTIVATION	`N`
WEB DESCRIPTION	`Active`
LINK TO CURRENT WEB APPLICATION	(not used here)
KIOSK USER ID	`1234`
KIOSK DISABLED	`N`
YEARS SINCE FIRST ACTIVE	Number of years between the current date and the person's DATE STARTED.

Phone numbers report pipelines

Phone numbers

One record for every valid phone number associated with the current person.

Field	Description
KIND	"Business", "Home", "Mobile", etc.
PHONE NUMBER	Formatted exactly as it shows in the address editor.
PHONE NUMBER WITH KIND LABEL	`Business: (518) 618-0746`

Phone numbers by type

A single record with one field for each type of phone number the person can have.

Field	Example
BUSINESS	`(518) 618-0746`
HOME	
MOBILE	`(518) 229-0000`
E-MAIL	`support@bespoke.com`
EMERGENCY	`911`
AGENCY	
GAMES	
PAGER	
FAX	
WEB SITE	`www.bespoke.com`
ANY, PREFER E-MAIL ADDRESS	E-mail address if known and valid, otherwise any other phone number.
ANY, PREFER HOME PHONE	Home phone number if known and valid, otherwise any other phone number.

ANY, PREFER MOBILE PHONE	Mobile phone number if known and valid, otherwise any other phone number.
ANY, PREFER WORK PHONE	Work phone number if known and valid, otherwise any other phone number.

For both,

- Values are formatted exactly as shown in the address editor.
- Invalid phone numbers are not included here.
- Remember that an e-mail address is considered a type of phone number.

Games data report pipeline

For a report based on Games, there will be one record in this pipeline for each Games. All other reports have information about the current Games, if applicable.

Field	Description
ASSIGNMENT COUNT	Total number of job assignments made in the Games.
ASSIGNMENT DATE RANGE	Earliest and last dates associated with the assignments in this Games.
ASSIGNMENT LOCATIONS	A list of all locations used by assignments in the Games.
ASSIGNMENT SPORTS	A list of all sports used by assignments in the Games.
DESCRIPTION	
LONG DESCRIPTION	
GAMES GROUP	
START DATE	
END DATE	
LOCATION	Primary location, defined in the Games setup.
STAFF	All GMS users assigned as staff of the Games.
OWNERS	All GMS users assigned as owners of the Games.
INDIVIDUAL COUNT	Total number of unique Individuals.
INDIVIDUAL HOURS	Sum of Individual hours associated with the Games.
INDIVIDUAL VALUE	Sum of the value of Individual hours associated with the Games.
(*) COUNT	Count of other types of people registered in the Games.

Relationship report pipeline

Contains one record, and a field for each type of relationship. Each field will resolve to all of the people in that relationship with the current person.

Field	Description or example
SIBLING	`Alison`
EMPLOYER (OF EMPLOYEE)	`Bespoke Software, Inc.`
CHILD (OF PARENT)	`Sabina Chevrette`
SPOUSE	`Marly Martinez`
FORMER SPOUSE	

(plus dozens of other additional relationships - one field for each relationship defined in GMS, even if no one is associated with the current person in that relationship)

Relationships report pipeline

Zero or more items: all relationships for that person.

Field	Description or example
RELATIONSHIP	`Father of`
RELATIONSHIP (REVERSED)	`Daughter of`
RELATIVE	`Sabina Chevrette`
DESCRIPTION	`Father of Sabina Chevrette`
START	`07/12/2006`
END	
COMMENTS	`Sabina is Michael's daughter.`
(RELATIVE).*	Attributes of the relative.
SOURCE	`Chevrette, Michael`
TARGET	`Chevrette, Sabina`

Report images report pipeline

Only available if one or more ***report images*** (page 111) have been defined. One field for each report image that exists, each with the name that you gave the report image itself. Note that to use one of these on a report you must place a `DBImage` object on the report, then associate that field with the data pipeline `Report Images` and the data field for the image you want. Changing the saved report image changes the image everywhere it's used on every report.

Security rights report pipeline

This pipeline contains one field for each possible security right the current person has. The list of fields is extensive and not documented here, but each field is self-explanatory.

System report pipeline

Information about the current GMS 6 installation.

Field	Description or example
APPLICATION NAME	`GMS 6`
APPLICATION VERSION	`1.8.0.0`
COPYRIGHT	`©1997-2011 Bespoke Software`
CURRENT DATE	The current date in the preset date format.
CURRENT DATE (LONG)	`January 31, 2011`
CURRENT DATE (LONG, WITH DAY OF WEEK)	`Monday, January 31, 2011`
PAGE BREAK	This field is here for lack of someplace else to put it. In custom reports when a page break is specified, this is the varying value which is used to trigger a page break.
REGISTERED COMPANY	Company that this copy of GMS is registered to.
REGISTERED USER	User name associated with this copy of GMS' registration.
REPORT NAME	
REPORT TITLE	
USER ID	If GMS security is enabled and the current person is logged in, this is that person's user ID.
USER NAME	For GMS security, the logged-in user's real name.

Trainings report pipelines

There are three training record pipelines available:

- Training: the current training when the report is based on training records.
- Trainings: all trainings for this person.
- Training course: the current course when the report is based on training courses.

All three have nearly identical fields within them.

Field	Description or sample
SUBJECT	`HIPAA compliance`
DESCRIPTION	
LOCATION	`Main office`
START, START DATE	`08/13/2009`
START TIME	`8:00am`
END TIME	`12:00pm`
DURATION	`04:00`
EXPIRATION	For a training record, the actual expiration date of the training; for a course, the default expiration date for new people added to the course.
COURSE ID	Course's 16-digit ID code
INSTRUCTOR	The instructor's 16-digit ID code
INSTRUCTOR NAME	`Clink, Jen`
CATERING	`Pizza`
MIN CAPACITY	
MAX CAPACITY	
ENROLLMENT	Count of people registered in the course.
STUDENT NAME	`Smith, Jane` (only available for training records, not for courses)
STATUS	"Pending", "Complete", "Failed", "Registered", "Did not show", "Course cancelled", "Individual cancelled" (only available for training records, not for courses)

Transitions report pipeline

One record for each transition record.

Field	Description or sample
DATE	`10/29/2010`
DESCRIPTION	`10/29/2010: Archived "Not archived" --> "Archived"`
ENTRANT	ID code of the person.
KIND	`Archived`
NEW VALUE	`False`
OLD VALUE	`True`
NOTES	

Subreports

Place a subreport within the body of a report to detail the records in a pipeline other than the primary one where that pipeline may have more than one record. For example, if the primary pipeline has people in it, and you want to show every phone number for that person, add a subreport. Set the pipeline to that subreport to "Phone numbers". (You'll see a tab at the bottom of the designer with that pipeline's name.) Within that subreport, put the "Phone number" and "Kind" fields, setting each to the "Phone numbers" pipeline. When each person prints, the subreport will print once for every phone number that the person has, including the fields you placed on it.

Display Formats

Within the Report Designer, and in Custom Column reports, you can specify a display format for various fields. The formats available vary by field and data type.

Special format prefix codes

Use these to simplify the display of prefixes on fields in reports.

Format	Code
&	When used at the beginning of any display format, is replaced in the report when run with the name of the field plus a colon (:), but only if the field's value is not blank.
~xxxx~	When used at the beginning of any display format, the text between the tildes is displayed at the beginning of the field when printed, but only if the field's value is not blank.

For example, the display format "&" when used on a person's DATE STARTED field will display

```
Date started: 01/12/2010
```

if there is information in the field. If the field is blank nothing will display. This removes extraneous and confusing labels from the report.

Number fields

Format	Description	Code
-1,234		#,0;-#,0
-1,234.40		#,0.00;-#,0.00
(1,234.40)		#,0.00;(#,0.00)
($1,234.40)		$#,0.00;($#,0.00)
-$1,234.40		$#,0.00;-$#,0.00
-$1,234		$#,0;-$#,0
($1,234)		$#,0;($#,0)
-1234 %		0 %
-1234.40 %		0.00 %
(all "time duration" options take a number field and consider it to be a duration, stored in hours)		
Time duration (system setting)	Uses the user-defined display option for durations, usually hours:minutes or fractional hours (hh.dd).	dur:sys
Time duration (system setting with seconds)	As above, but includes seconds.	dur:sys:ss
Time duration (decimal)	Always displays as fractional hours, e.g. "14.75".	dur:dd
Time duration (hh:mm)	Always displays as hours:minutes, e.g. "14:45".	dur:hh:mm
Time duration (hh:mm:ss)	As above, but with seconds included.	dur:hh:mm:ss

Date fields

Format	Description	Code

3/4/95		m/d/y
03/04/95		mm/dd/yy
03/04/1995		mm/dd/yyyy
4-Mar-95		d-mmm-yy
04-Mar-95		dd-mmm-yy
March 4, 1995		mmmm d, yyyy
3/4		m/d
Mar-95		mmm-yy
March-95		mmmm-yy
System setting	The date in the user-defined date format.	sys
System setting, just date	As above, but removes any time elements.	sys:date

Time fields

Format	Description	Code
1:30 PM		h:nn AM/PM
13:30		h:nn
1:30:55 PM		h:nn:ss AM/PM
13:30:55		h:nn:ss
System setting	Time in the user-defined time format.	sys
System setting, with seconds	As above, but including seconds.	sys:ss
Tight	Time in the smallest space possible, e.g. "Noon", "Midnight", "9am", "9:45pm".	tight
Tight, with seconds	As above, but including seconds.	tight:ss
Time duration (system setting)	Time as a duration in the user-defined duration format.	dur
Time duration (system setting, with seconds)	As above, but including seconds.	dur:ss
Time duration (decimal)	Time as a duration in decimal form, regardless of user-defined duration format.	dur:dd
Time duration (hh:mm)	Time as a duration in hh:mm form, regardless of user-defined duration format.	dur:hh:mm
Time duration (hh:mm:ss)	As above, but including seconds.	dur:hh:mm:ss

Date/time fields

Format	Description	Code
3/4/95 1:30:55 PM		m/d/yy h:nn:ss AM/PM
3/4/95 13:30:55		m/d/yy h:nn:ss
3/4/95		m/d/yy
03/04/95		mm/dd/yy
03/04/1995		mm/dd/yyyy
4-Mar-95		d-mmm-yy
04-Mar-95		dd-mmm-yy

March 4, 1995		mmmm d, yyyy
3/4		m/d
Mar-95		mmm-yy
March-95		mmmm-yy
System setting	Date/time in the user-defined format.	sys
System setting, just date	As above, but excluding any time elements.	sys:date
System setting, just time	User-defined date/time format but without the date.	sys:time
System setting, just time with seconds	As above, but including seconds.	sys:time:ss
System setting with seconds	Date/time in user-defined format, but including seconds.	sys:ss
Friendly	For dates in the past three days, shows, e.g. "(yesterday)", "2 days ago", otherwise uses the user-defined date format.	fr
Friendly with seconds	As above, but including seconds.	fr:ss
Tight	See "Tight" under "Time fields", but with the date included at the beginning.	tight
Tight, just time	See "Tight, just time" under "Time fields", but with the date included at the beginning.	tight:time
Tight, just time with seconds	See "Tight, just time with seconds" under "Time fields", but with the date included at the beginning.	tight:time:ss
Time duration (system setting)	Time as a duration in the user-defined duration format.	dur
Time duration (system setting, with seconds)	As above, but including seconds.	dur:ss
Time duration (decimal)	Time as a duration in decimal form, regardless of user-defined duration format.	dur:dd
Time duration (hh:mm)	Time as a duration in hh:mm form, regardless of user-defined duration format.	dur:hh:mm
Time duration (hh:mm:ss)	As above, but including seconds.	dur:hh:mm:ss

Boolean/checkbox/yes no fields

Checked/true value	Un-checked/false value	Code
Yes	No	Yes;No
Y	N	Y;N
True	False	True;False
T	F	T;F
OK		OK;
Done		Done;
	Not OK	;Not OK
	Not Done	;Not Done

Applicant Screening

GMS offers three major tools for screening:

- ***Background check processing*** (page 134)
- ***Reference checks*** (page 145)
- Interviews

Background Checks

GMS integrates with two major US-based background check vendors, Lexis-Nexis and IntelliCorp. (Previous versions of GMS supported ChoicePoint. Since their merger with Lexis-Nexis only the ChoicePoint interface is being maintained by the combined company and that name is used on these background check requests even though they're being processed by Lexis-Nexis.) In addition, GMS supports a generic background check request which can be exported to other vendors, but whose results would need to be entered manually.

Caution:	Bespoke Software and GMS 6 only provide the tools to interface with background check vendors. We do not provide these services ourselves and are not involved in the relationship between your organization and the background check vendor. You are responsible for applying for, maintaining and paying for your own accounts with these vendors. In addition, Bespoke Software makes no statements regarding the quality or suitability of any of the services referenced here.

Concepts

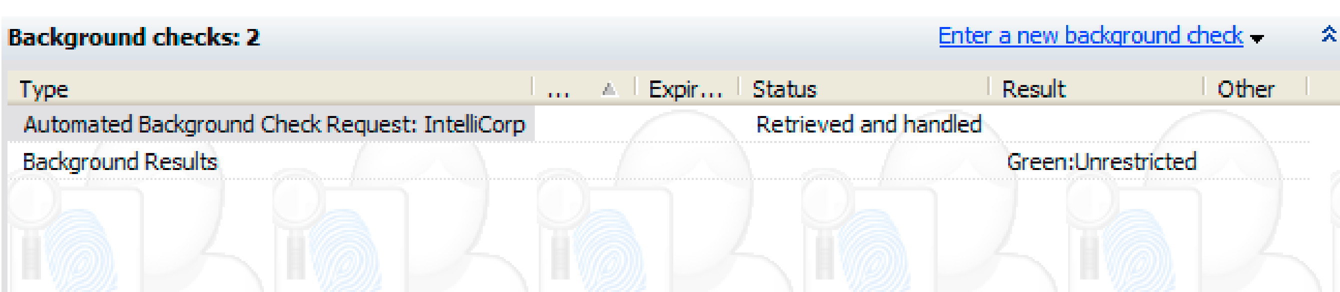
Background check processing in GMS is comprised of five steps:

1. Entering background check requests for individual Individuals.
2. Submission - online or otherwise - of these requests for processing.
3. Retrieval of request results.
4. Manual examination of results to determine the suitability of each Individual.
5. Communication of results to Individuals and marking of Individuals as acceptable or otherwise.

The types of background check requests available here will vary depending on which ones are enabled. Use the **Certifications** (page 29) link on the **Setup** panel to configure this.

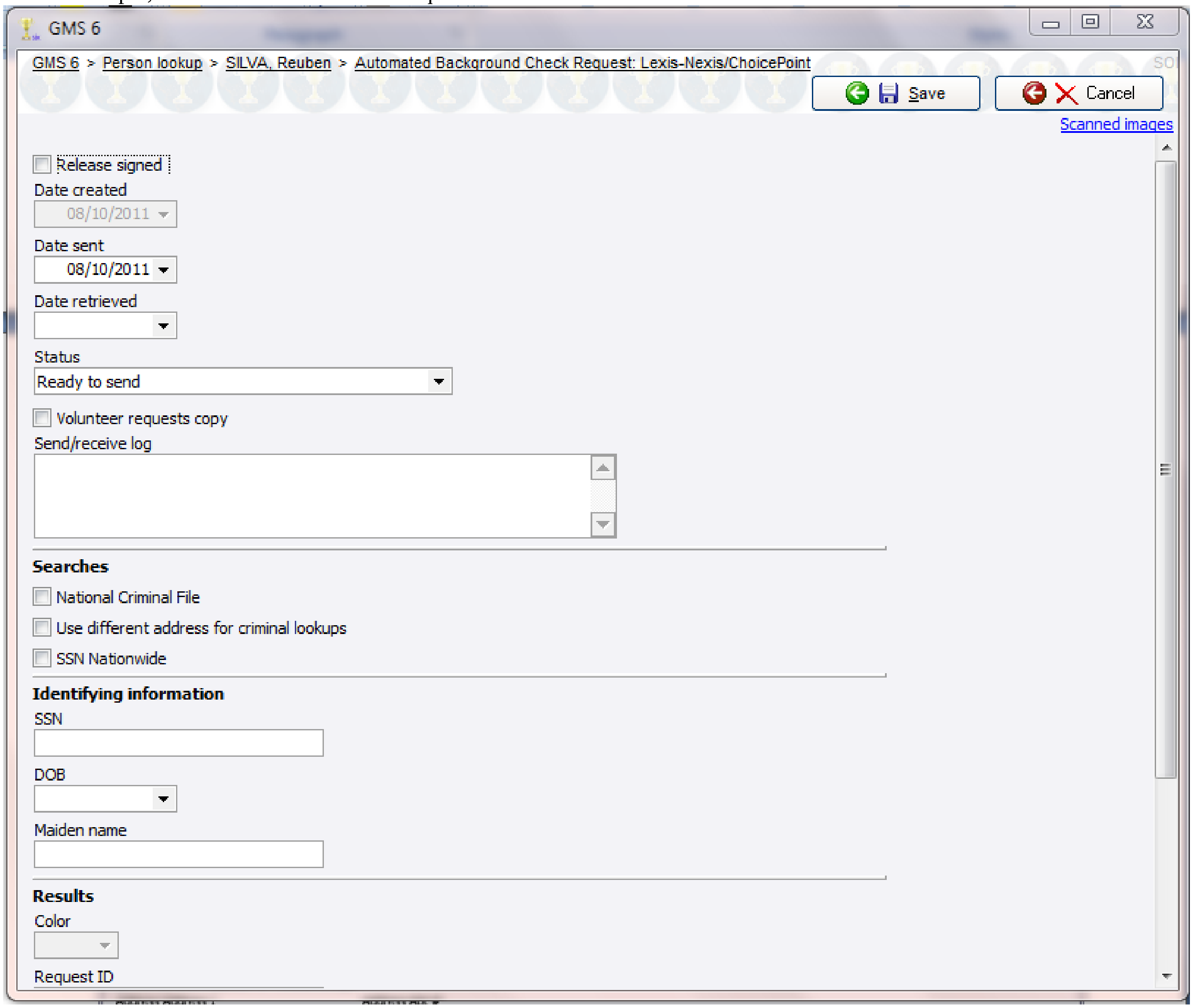
Enter Background Check Requests

Enter background check requests from the **Profile Editor** for each Individual by clicking the **Enter a new background check** link.



Tip: If you do not see background checks as an option when you click Enter a new background check, check Certifications in the Setup panel and make sure the certification for the vendor you are working with is active.

In this example, we'll use the ChoicePoint request.



1. Enter all of the appropriate information. Some fields will appear and disappear based on the status of other fields, e.g. the MVR 1 MVR State 1 field appears only if Motor Vehicle Records is checked, and MVR 1 MVR License #1 appears only if Motor Vehicle Records is checked and MVR 1 MVR State 1 is not blank.
2. Click **Save** to save this request.

Because of the complex rules for these requests, they are only validated when submitted to the background check vendor. GMS doesn't know if you've filled in enough information at this point, so make sure that you do fill in everything here that's relevant and required by your background check vendor.

Fields in yellow are encrypted fields: once saved, they cannot be read again without an appropriate decryption key.

ChoicePoint

Working with ChoicePoint (processed by the company Lexis-Nexis) is a four-step process:

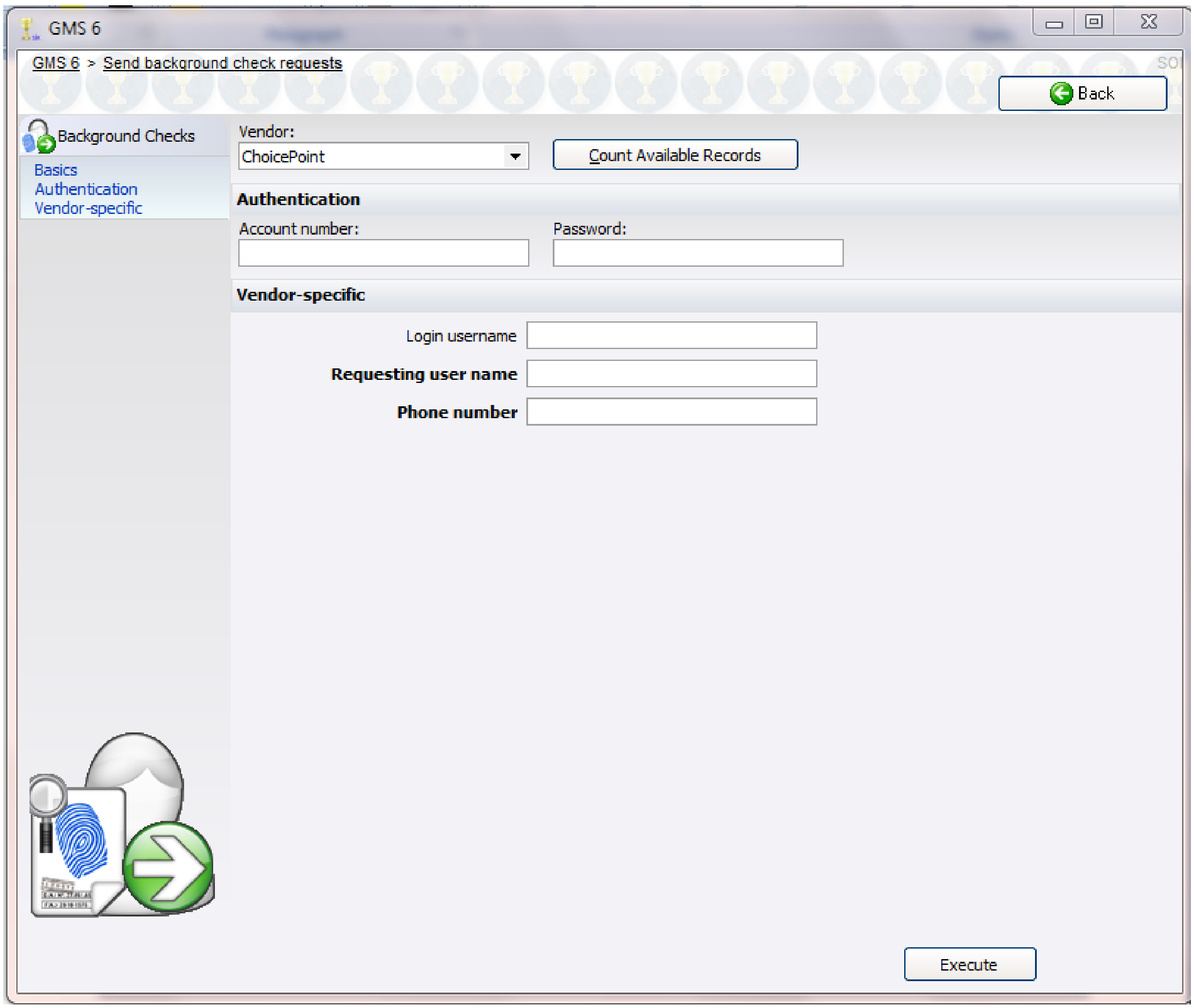
1. ***Enter the background check requests*** (page 134) for each person
2. ***Submit the requests to ChoicePoint*** (page 136)
3. ***Retrieve the results*** (page 137)
4. ***Process the results*** (page 140) manually

Submitting ChoicePoint Requests

Lexis-Nexis accepts ChoicePoint requests from GMS via an XML web interface, and provides the results to you, when they're completed, over the web as well. When GMS looks to get the results, it will log into ChoicePoint's server to find all of the eligible results and download them for your manual processing.

Steps in this task

1. Click on Send automated requests from the Applicant screening panel.



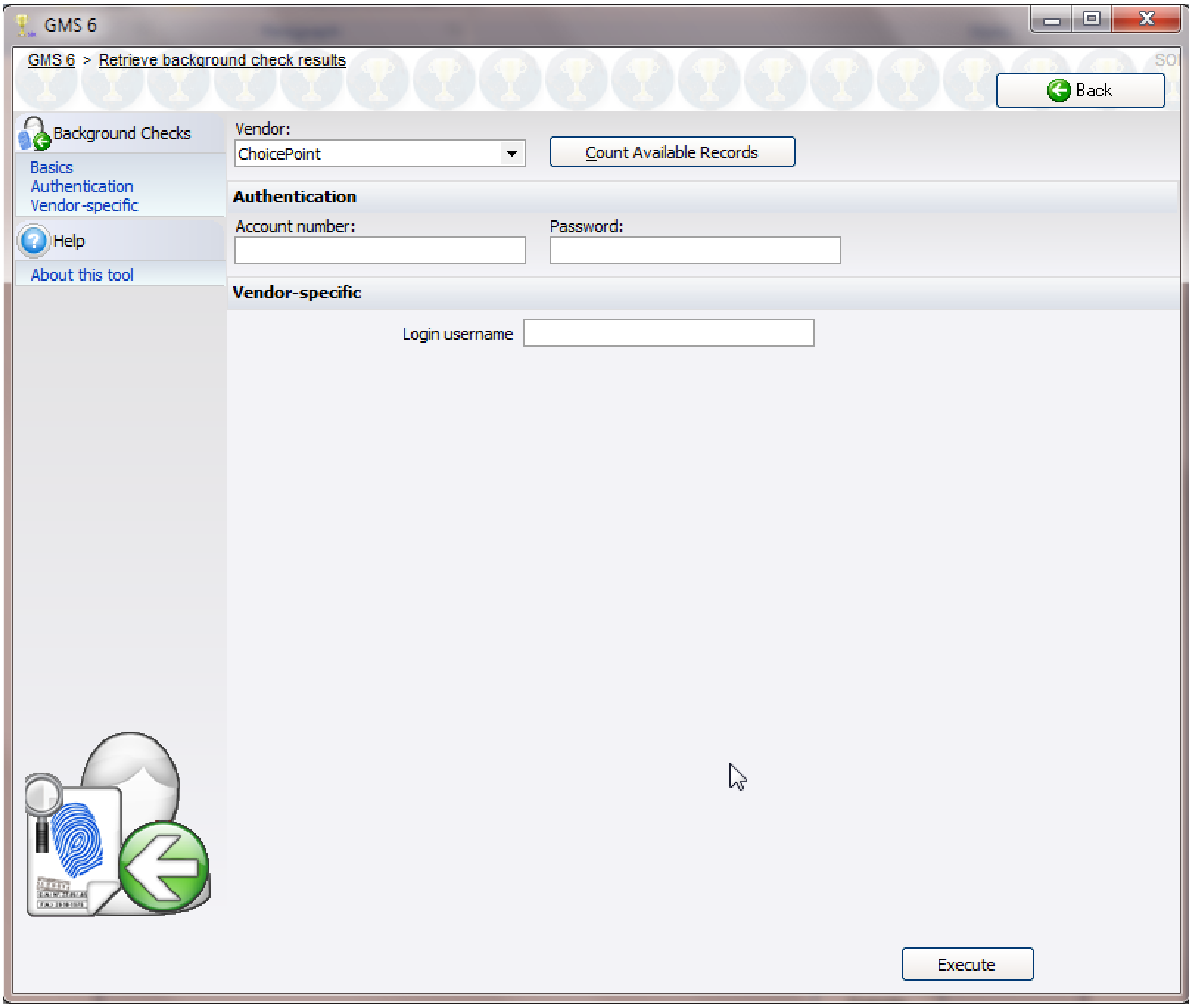
2. Select ChoicePoint as the VENDOR from the top pull-down menu.
3. Click **Count available records**. If encryption is enabled, provide the decryption key: it will be needed for GMS to read the encrypted data which it must submit with every request.
4. Enter the ACCOUNT NUMBER and PASSWORD for your account. This is provided by Lexis-Nexis, and Bespoke cannot assist in your relationship with the vendor.
5. Enter the vendor-specific data as appropriate: LOGIN USERNAME, REQUESTING USER NAME and PHONE NUMBER.

Click on **Execute** to send the requests to the Lexis-Nexis.

Retrieving ChoicePoint Results

Steps in this task

1. Click on Retrieve background check results from the Applicant screening panel.
2. Choose ChoicePoint as the VENDOR.



3. Click **Count available records**. If encryption is enabled, provide the decryption key: it will be needed for GMS to read the encrypted data which it must submit with every request.
4. Enter your login information.
5. Click **Execute**. GMS will retrieve all of the results from the server, then mark them in GMS as "Retrieved from ChoicePoint, awaiting manual handling".

IntelliCorp

IntelliCorp accepts requests from GMS via an XML web interface, and provides the results to you, when they're completed, by e-mail. For GMS to automatically deal with response e-mails, you need to set up a separate e-mail account for these results, and give GMS access to that account.

Caution:	GMS can only connect to the e-mail account using SMTP. If you're using Exchange as your e-mail server, your IT department will have to configure Exchange to allow SMTP login for GMS to retrieve e-mails there.

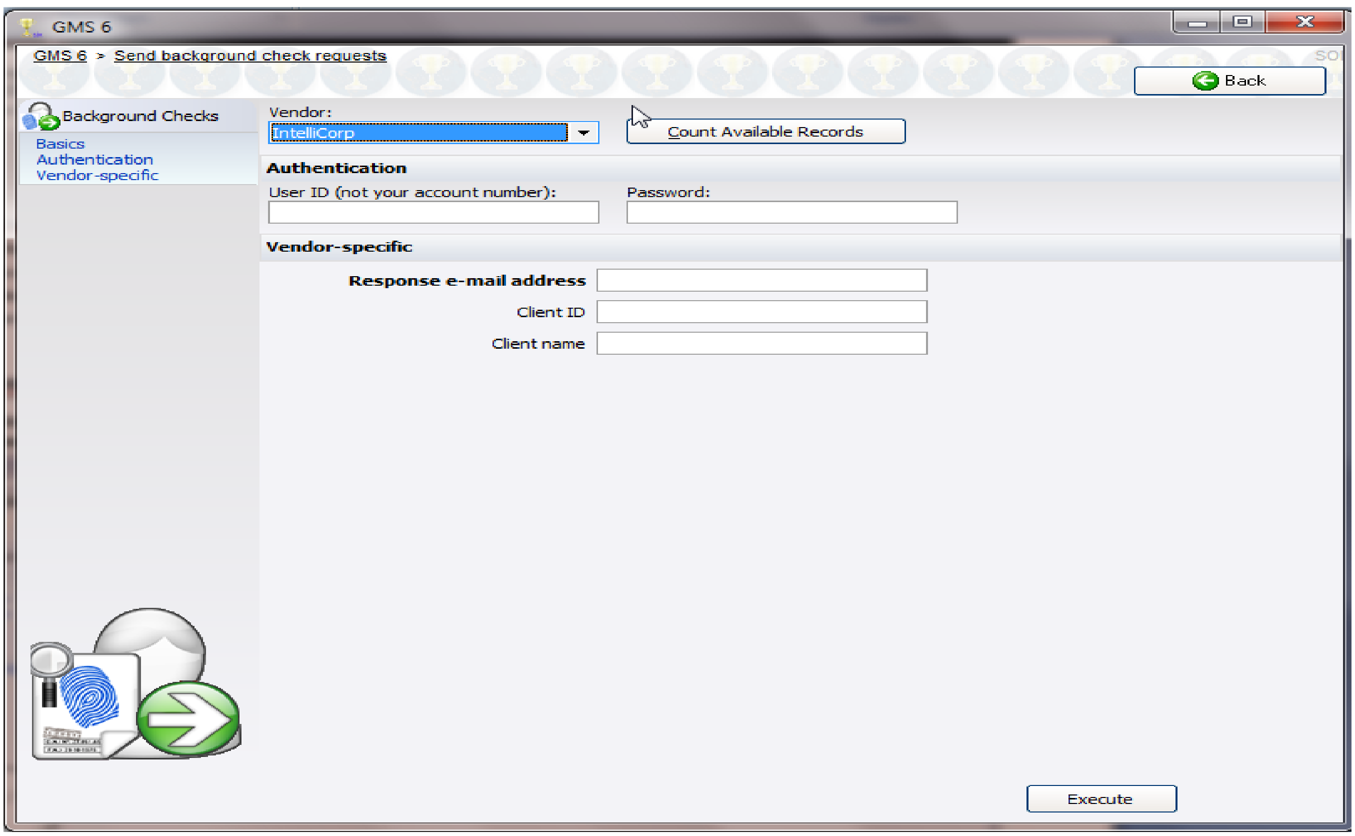
Working with IntelliCorp is a four-step process:

1. ***Enter the background check requests*** (page 134) for each person
2. ***Submit the requests to IntelliCorp*** (page 138)
3. ***Retrieve the results*** (page 139)
4. ***Process the results*** (page 140) manually

Submitting IntelliCorp Requests

Steps in this task

1. Click on Send automated requests from the Applicant screening panel.

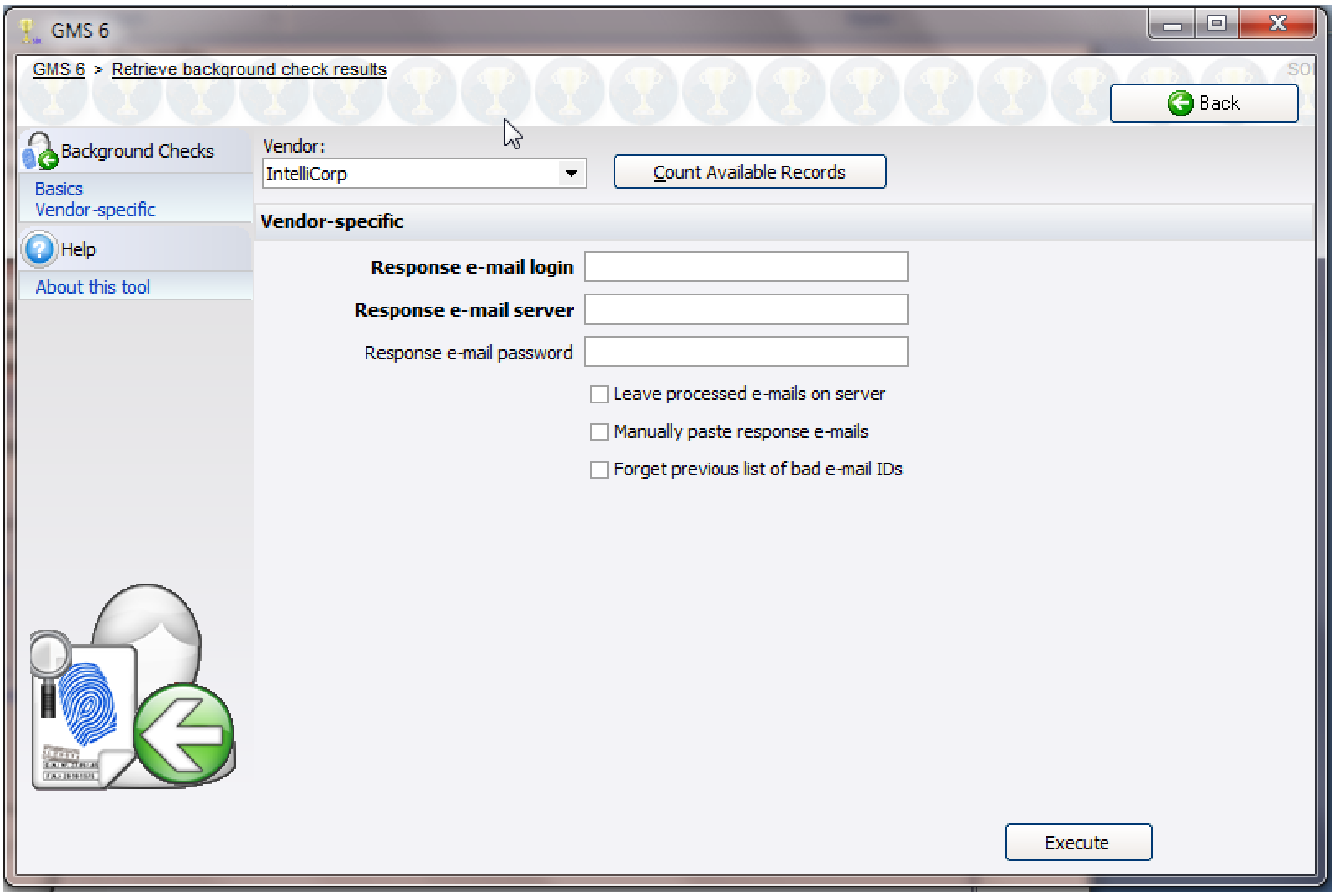


2. Select IntelliCorp from the top pull-down menu.
3. Click **Count available records**. If encryption is enabled, provide the decryption key: it will be needed for GMS to read the encrypted data which it must submit with every request.
4. Enter the ACCOUNT NUMBER and PASSWORD for your vendor. This is provided by the vendor, and Bespoke cannot assist in your relationship with the vendor.
5. Enter the RESPONSE E-MAIL ADDRESS, CLIENT ID, CLIENT NAME and OFFICE as appropriate. Of the four values here, the most important is RESPONSE E-MAIL ADDRESS. IntelliCorp will send the results of this background check processing to you by e-mail, and it will be sent to the e-mail account specified here.
6. Click on **Execute** to send the requests to IntelliCorp.

Retrieving IntelliCorp Results

Steps in this task

1. Click on Retrieve background check results from the Applicant screening panel.
2. Choose IntelliCorp as the VENDOR.



3. Click **Count available records**. If encryption is enabled, provide the decryption key: it will be needed for GMS to read the encrypted data which it must submit with every request.
4. Enter your e-mail login information: login, server and password.
5. Click **Execute**. GMS will retrieve all of the results from the mail server, then mark them in GMS as "Retrieved from IntelliCorp, awaiting manual handling".

Field name	Description
RESPONSE E-MAIL LOGIN	The login into your mail server, probably your e-mail address (e.g. *bchecks@yourorg.org*).
RESPONSE E-MAIL SERVER	Name or IP address of your mail server, e.g. *mail.yourorg.org*.

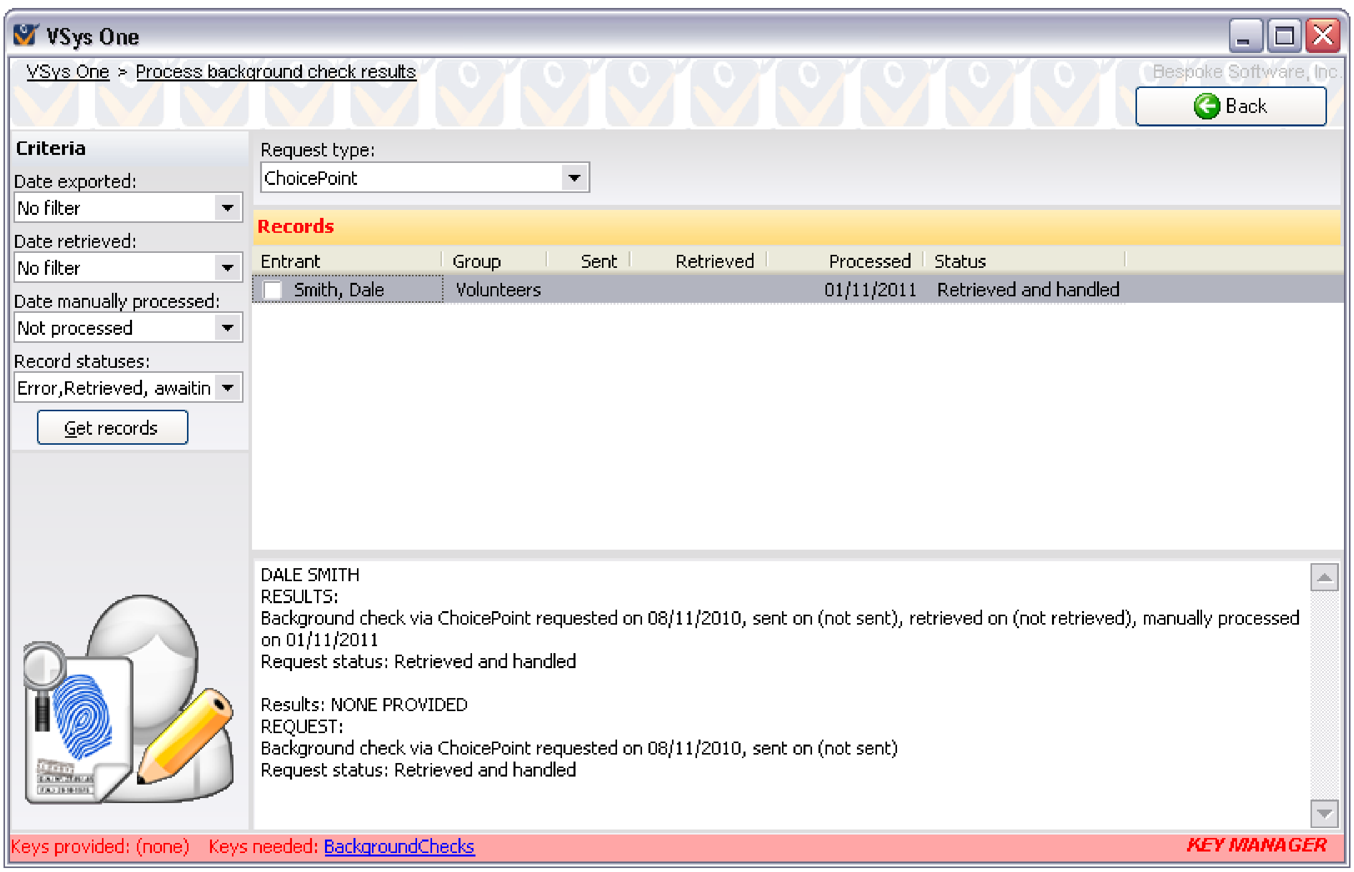
RESPONSE E-MAIL PASSWORD	Password for the e-mail account login above.
LEAVE PROCESSED E-MAILS ON SERVER	Normally after downloading and processing a valid e-mail, GMS will remove it from the mailbox. Check this box to force GMS to leave the message in place.
MANUALLY PASTE RESPONSE E-MAILS	If you've retrieved results e-mails manually with another e-mail application, check this box. When you click **Execute**, GMS will prompt you to paste the full body of that e-mail into GMS and process it as if it downloaded the e-mail itself.
FORGET PREVIOUS LIST OF BAD E-MAIL IDS	GMS remembers, as it processes results e-mails, the UID (unique ID code) of e-mails which were invalid. If your mail server re-uses UIDs, GMS could incorrectly consider a valid e-mail to be bad. Checking this box forces GMS, when you click **Execute**, to forget the UIDs of any previous bad e-mails and to look again at all of them in the e-mail box.

Request Results Handling

After the raw results have been downloaded, they must be checked and approved or disapproved by a human operator. GMS will never make any acceptance or rejection decisions for you - this process requires a trained user to intelligently determine the suitability of every applicant.

Steps in this task

1. Open the Request results handling tool from the Applicant screening panel.



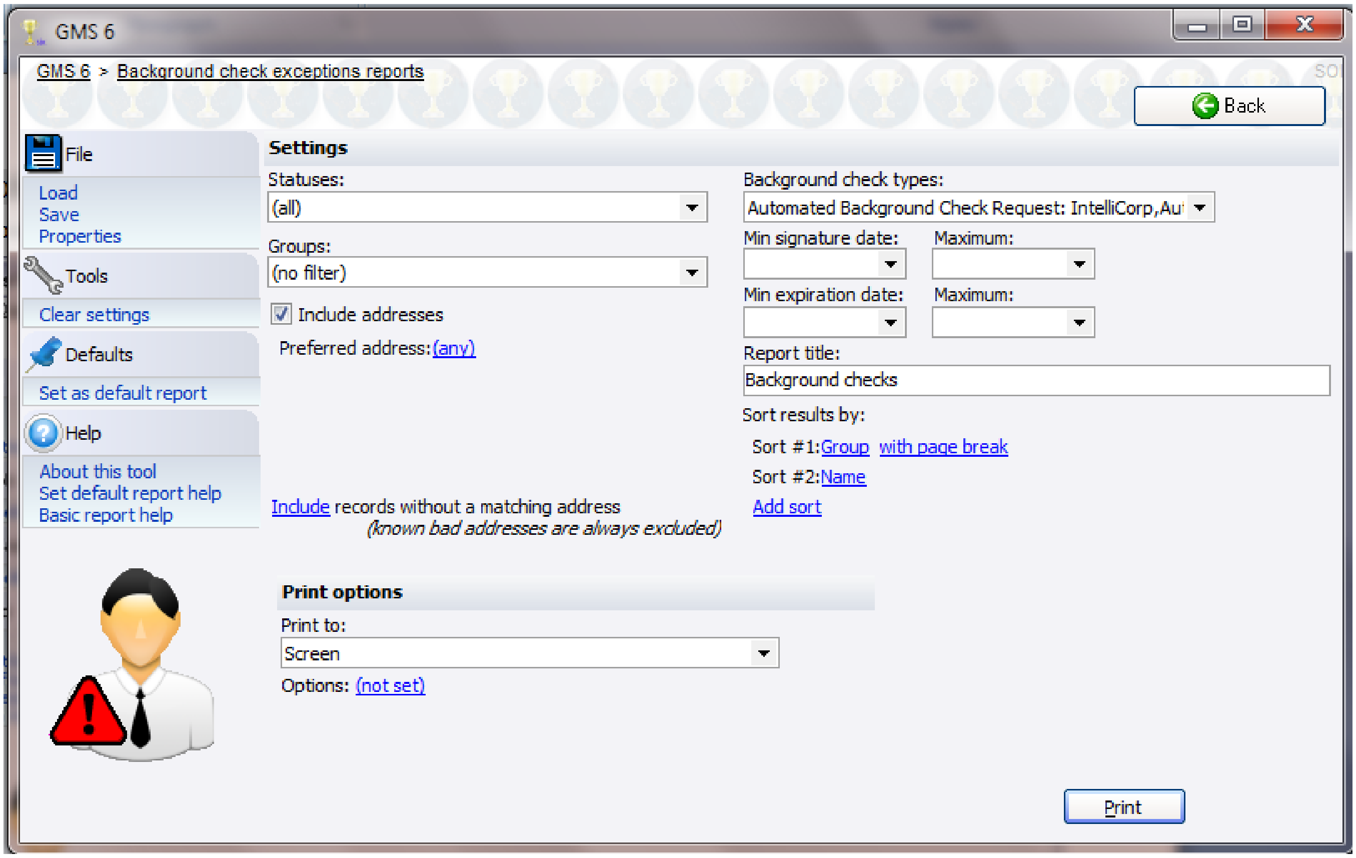
2. Select the appropriate REQUEST TYPE, in this case the vendor you're working with.
3. Enter any filters to the left. For manual background checks, or those which were exported to an unsupported vendor, make sure that your RECORD STATUSES include enter the appropriate values so you can see the records you sent. When results are retrieved from a supported vendor, GMS sets the status to "Retrieved from xxx", this is not done automatically for other vendors.
4. Click on each record, and examine the results at the bottom. Is this Individual acceptable? Unacceptable? Needs further checking?

On the right-click menu

Edit	Background check request	Edits the request, as shown here.
	Background check results	The results for this Individual. This is a separate certification and each person has just one. If none exists, GMS will make it here.
	Individual	Brings up the Profile Editor for this person.
Mark background status	Sets the background check results status for this Individual to "Unknown", "Green", "Yellow", "Red" or "Unprocessed". This is not the status of the current request, but instead the Individual's Background results certification.	
Add a new background check request for this Individual	For Individuals who need additional checking, adds a new background check request of the type that you specify for this person. You can then send that request as part of the regular processing cycle next time you send background check requests.	
Selected records	Options for sending a letter to the checked Individuals.	
This record	Options for sending a letter to the selected Individual.	
Select	Checks All/None or Reverse for these requests.	
Add to list	Adds this person to the selected list.	
Remove from list	Removes this person from the selected list.	

Exceptions Reports

Background check exceptions reports will detail for you all background checks with the issues you specify.



Field name	Description	
STATUSES TO REPORT	Pending automatic checks with insufficient information	Goes through automatic background check requests whose status is pending to find those with insufficient or incomplete data.
	Approved background checks	Background check results with a status of "Green"
	Restricted/yellow background checks	Background check results with a status of "Yellow"
	Rejected background checks	Background check results with a status of "Red"
	Unknown status background checks	Background check results with a status of "Unknown" or "n/a"
	Checks with restrictions	Any background check results with one or more restrictions on them.
BACKGROUND CHECK TYPES	If **Pending automatic checks with insufficient information** is chosen, this is the type of certification to be checked for insufficient information.	
SIGNATURE DATE	Date range for the signature/effective date on the certification.	
EXPIRATION DATE	Date range for the expiration date on the certification.	
REPORT TITLE	Title to appear at the top of the report.	

Sample report results

Background checks

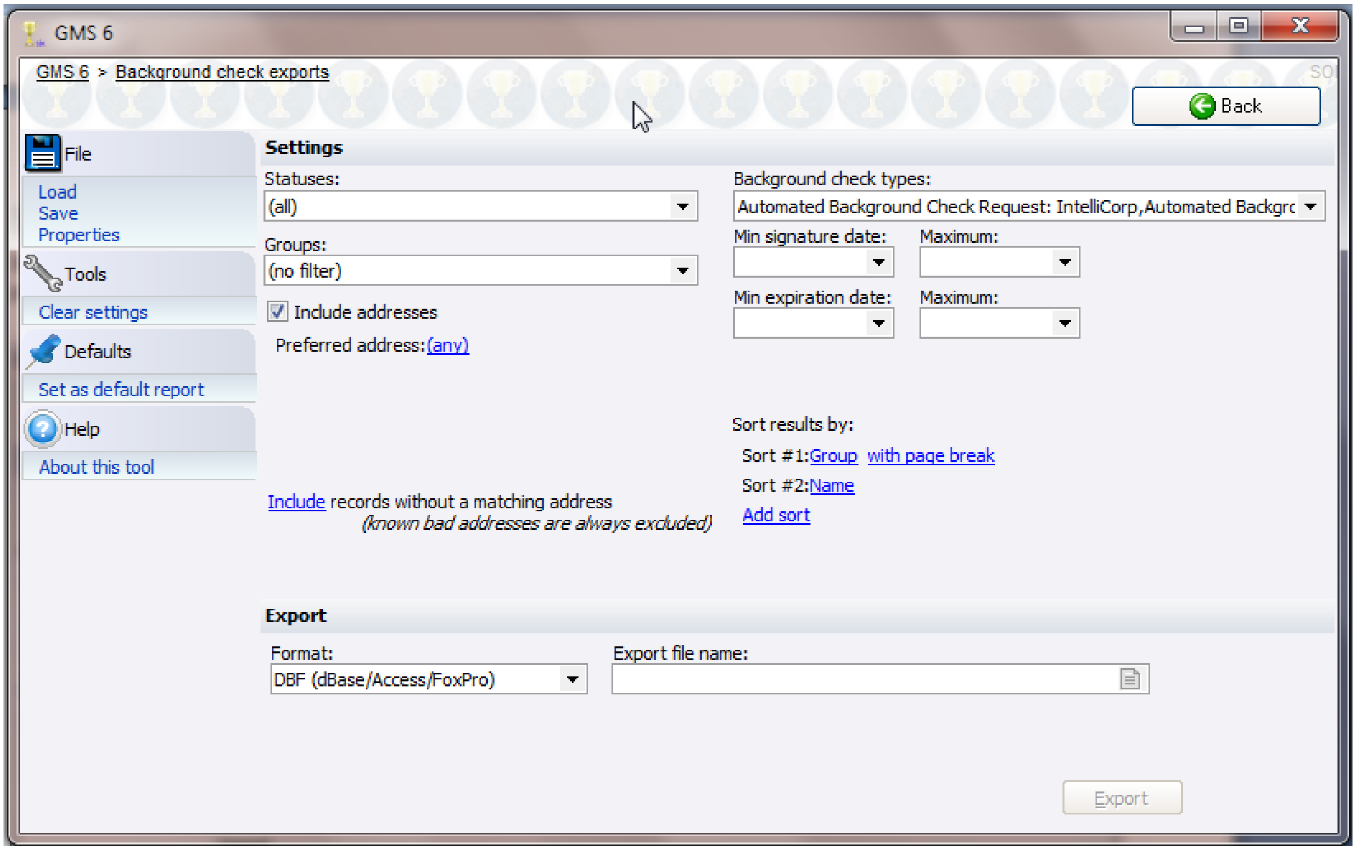
Doe, Jonathan H.	2-01 Antigo Unified Schools IntelliCorp

Doe, Jonathan H. --
"Doe, Jonathan H.": The required field "Purpose" was not entered.
"Doe, Jonathan H.": An SSN is required. Use 111-11-1111 for MVR-only searches if SSN is not available.
"Doe, Jonathan H.": No date of birth was provided
"Doe, Jonathan H.": No valid home address was found.
"Doe, Jonathan H.": The motor vehicle search did not provide a valid drivers license number

Background Check Reports

From the **Applicant screening** panel, select **Reports**. These reports can be run for any kind of **background check**, detailing the people, request and the results. You'll find several built-in reports.

.



Sample report

ChoicePoint Background Check Request Report

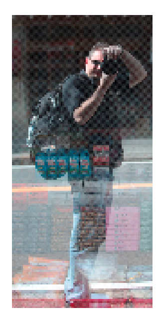
Cornett, William Q — Small Company

Male 03/04/1970 Staff — Northeast,00 - Artimus,Volunteers

1543 Paradise Lane — Staff

Riverside, CA 92501 **Ready to send** — Athlete,Volunteer,Security

True



Searches requested

National criminal file Felony including misdemeanor (state and county)

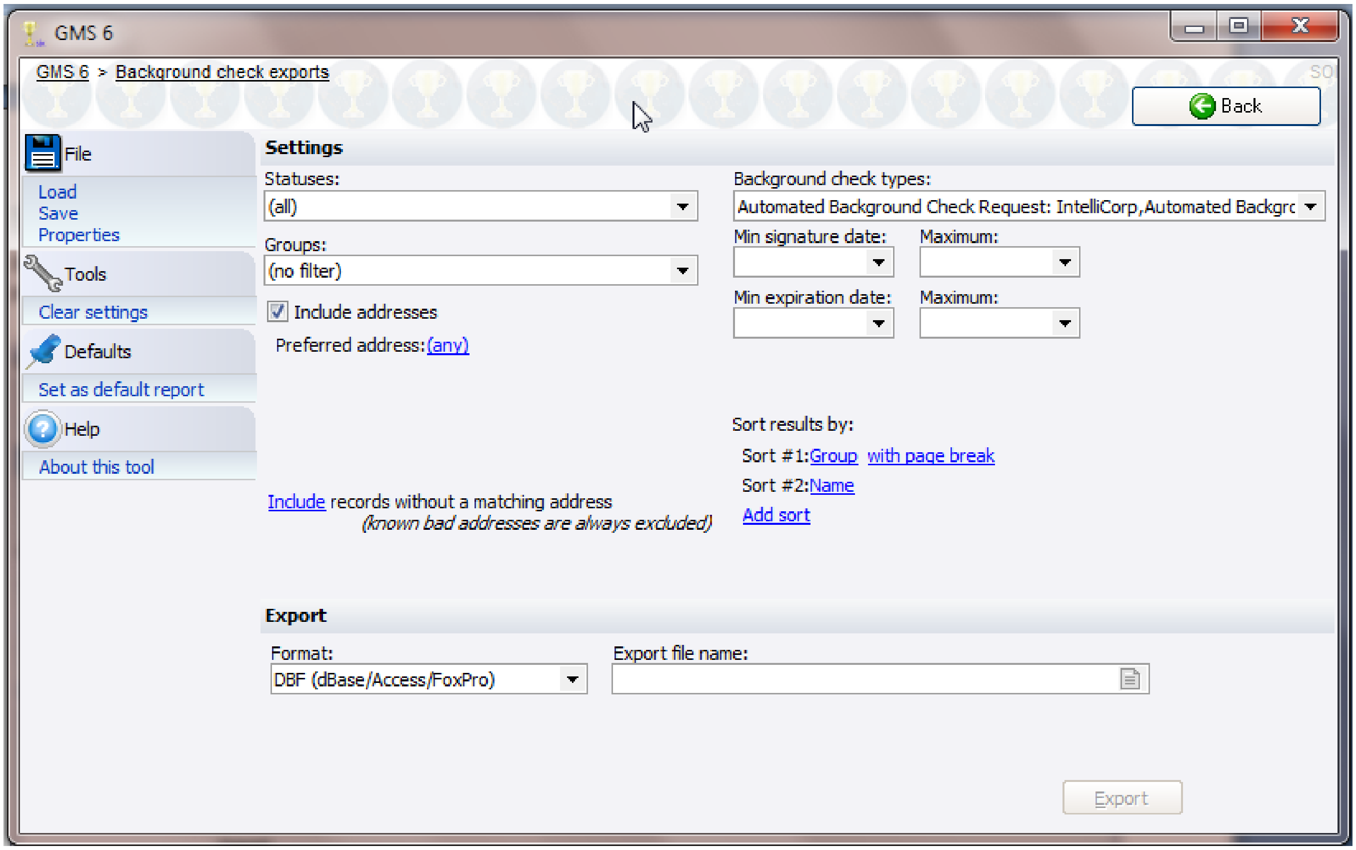
Statewide options: Statewide criminal database search Statewide record checks

SSN nationwide *California*

Motor vehicle records: *New York*

Background Check Exports

You can export background check requests to a database file for external processing. Select Exports from the Applicant screening panel.



In addition to all of the information about each person, the following fields from the background checks themselves will be included in the export file:

- Vendor
- Effective date
- Expiration date
- Issues

Reference Checks

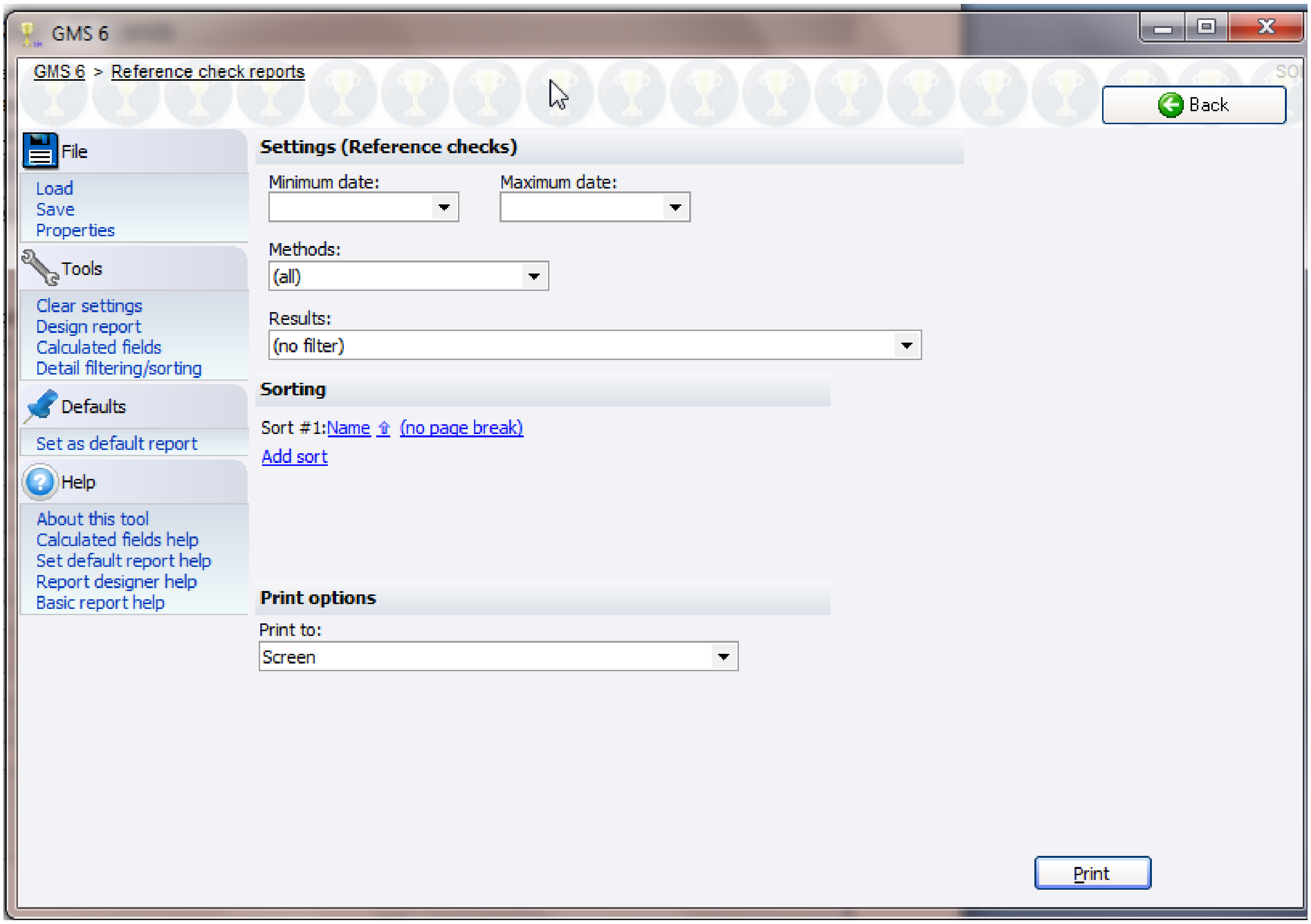
Concepts

GMS helps you send reference check letters to help assess the suitability of your Individuals. Send one or more of these to prospects, GMS will do the mail merges and track the results for each. You'll find the tools used here on the Applicant screening panel of the main GMS 6 screen.

Entering Reference Check Requests

Enter reference check requests from the Background checks panel in the Profile Editor.

1. Click on Enter a new background check, then select Background reference check.
2. Enter information about the person providing the reference. This will be used in generating the reference check letter.



3. Click **Save** to save this request.

The information here is for the **reference**, not the Individual. Using the reference check letters tools, GMS will send the letter to the person and address listed here.

---

1. Click on Reference check manager from the Applicant screening panel.
2. Enter your filters at the top: Minimum and Maximum request dates, Methods and Results.
3. Click **Get records** to bring up all reference checks which meet these criteria.
4. Click on any reference check to edit it, or right-click on one to edit the request, edit the Individual or quickly change its status.

Caution: Changes made here take effect immediately.

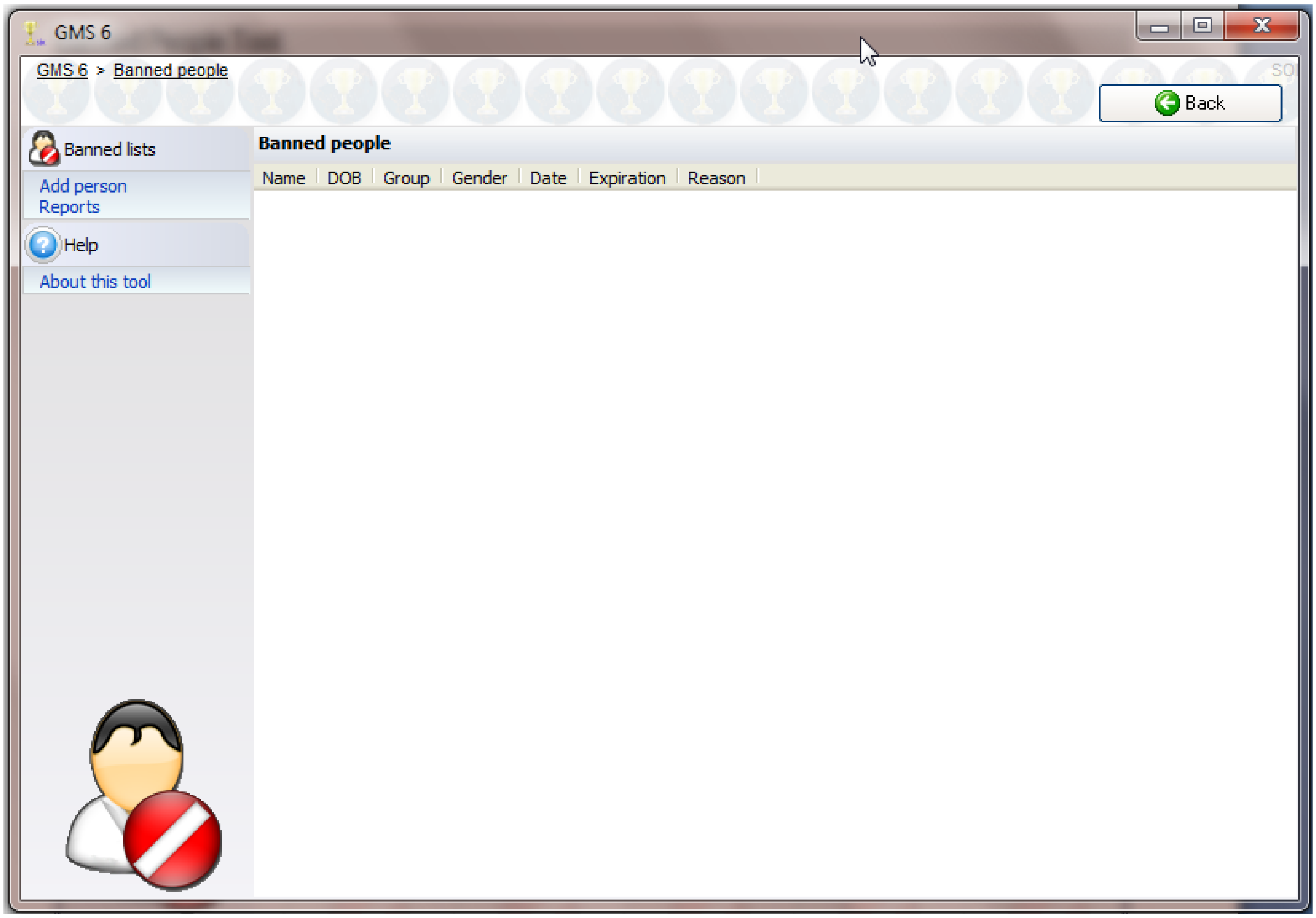
Banned People

Concepts

A banned person is one who is never allowed to participate with your organization. Use this for people who fail background checks or have shown themselves to be otherwise unacceptable under any circumstances. When registering someone in a Games, GMS will check to see if the person is banned, or if he matches any significant attributes of someone who is banned. People who are banned are locked out altogether, those who match attributes of banned people result in the user being prompted to verify that they are not the banned person.

Banned People Tool

To work with all banned people at once, from the main GMS screen, go to the Applicant screening panel then click on View/edit banned people.



Tools

Add person	Brings up the person lookup tool to find or create the person to be marked as banned.
Reports	Reports specific to banned people with their personal data and photos where available.

On the right-click menu

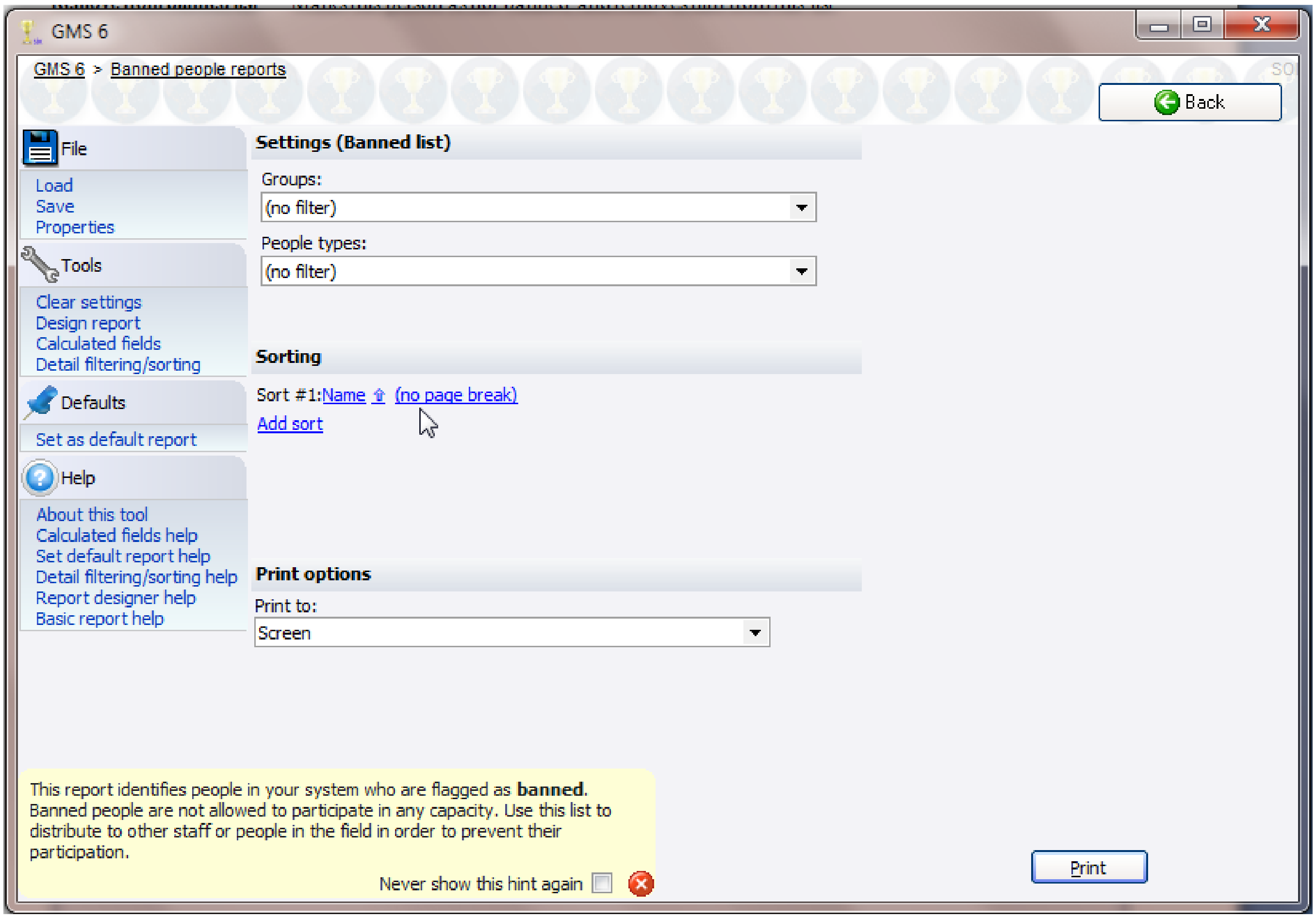
Add to banned list	Brings up the person lookup tool to find or create the person to be marked as banned.

View	Opens this person in read-only mode.
Edit	Opens this person for editing.
Remove from banned list	Marks this person as not banned, and removes him from this list.

Banned People Reports

If you have a reasonably small number of banned Individuals, these are great for keeping at the reception area, security desk, or other places where you'll want to be on the lookout for unwelcome "help".

From the Applicant screening panel, choose Banned people report.



Sample report

Banned People Report

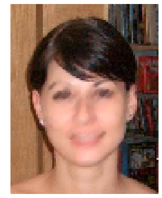
Northeast

McMahon, Amy 06/19/1974 Female 123 Main Street
Other Schenectady, NY 12345

Naughty, evil Zoot set alight the grail-shaped beacon!

Ban expires: 12/31/2011

Northeast
Coach



User Tools

Advanced Exporter

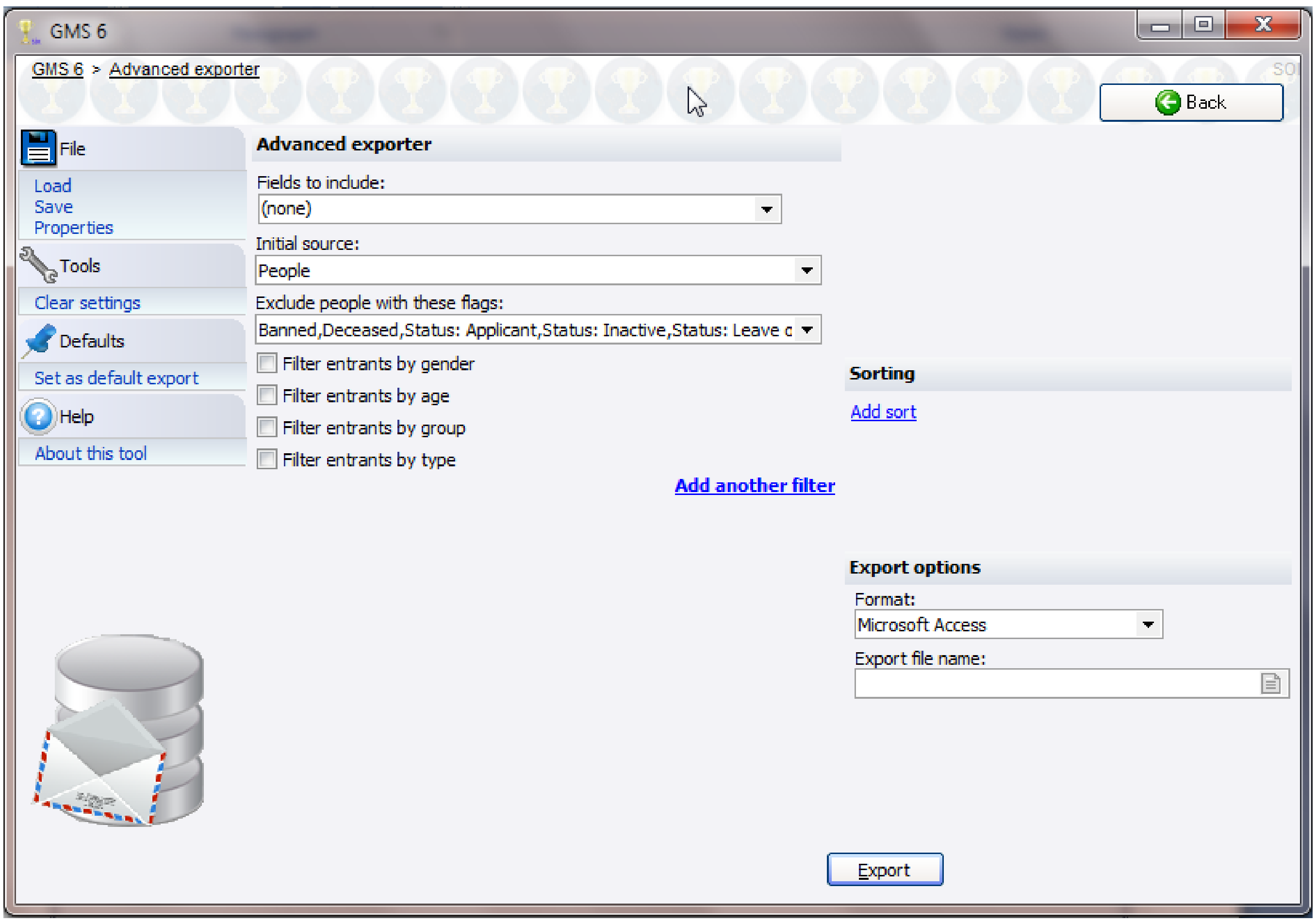
Concepts

To send data to another application, or do a mail merge using Microsoft Word, OpenOffice, or your own database, GMS lets you select the fields to be exported and sends that data into an export file that you can use in other programs.

Getting started

From the User tools panel, click Advanced exporter, or from the Letters, mail merges and mailing labels panel, click on Mail merge via export file.

When exporting from within a Games, if a person is registered in the Games more than once, he will be exported once for every delegation that he's in.



Filters

People are only included in this export if they meet *all* of the criteria you specify.

FIELDS TO INCLUDE (see below)

FOR LETTERS GOING TO 2+ PEOPLE...	If checked, and two or more people sharing an address are included here, only one label will be printed for all of the people sharing that address.
INITIAL SOURCE	This is the basis for the export, and it can be any of:

Option	Data exported
People	People who meet your criteria
Certifications	Certification records
People on one or more lists	People who meet your criteria and who are on one or more of the given lists
Credentials	Credential information
Trainings	Training records - people in training courses or with training history
Training courses	Training courses - no people are included
Comments	Comments attached to Individuals
Transitions	Transition records

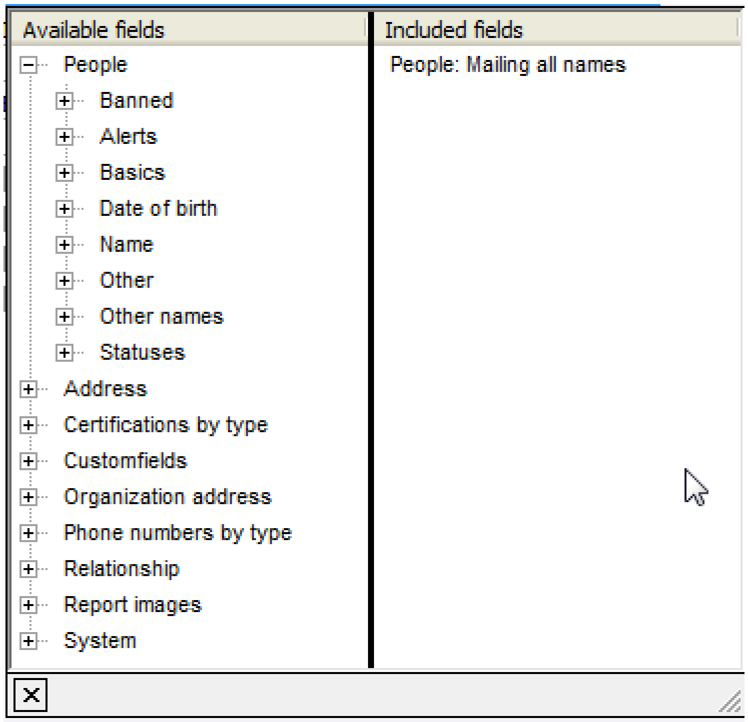
Depending on the type of data you're exporting, the filters below will change.

EXCLUDE PEOPLE WITH THESE FLAGS	Only people of these types (globally) or roles (in a Games) are included.
FILTER ENTRANTS BY...	Filters for gender, age, group and type.
Add another filter	
ADDRESSES	If you have a preference as to what type of address this should go to for people with more than one address, or limit it to specific address types, add one or more address types here. GMS will look for an address of each type starting from the top, and use that one if it meets the further criteria below. Adding the fallback address type (any) will take any address type that meets the remaining criteria. Putting (any) after other address types makes GMS use the others first if available, otherwise whatever other kinds it can find.

You can add any other types of filters by using the Add another filter link. There are over 30 filter options there, and GMS will only include a record in the export if it meets all of the ones you set above plus any of these.

Fields to include

Pulling down the FIELDS TO INCLUDE editor brings up a pair of lists. On the left are the fields you have available to export, on the right are the fields that will be included in the export. These fields are grouped in the same way they are in the mail merge tool.



- Add a field by dragging it from the left side to the right. In the Included fields in this example, "People" indicates it came from the big category on the left of People, and then specific fields for name, first name and family name within that. (Click on the plus sign in front of "People" to view all the field options.)
- Delete a field by dragging it from the right side to the left side, or by clicking on the field and hitting the **Delete** key.
- Re-arrange fields by dragging the up and down on the right-hand list. Fields at the top will appear first in the export.
- You can select more than one field at a time by clicking first on one field then, holding down the **Shift** key, click on the last field. Now you can move the selected fields together as a group.

Sorting

Add one or more sort criteria to make GMS export the records in a particular order for you. Records will first be sorted by the topmost field, then the second field, then the third, and so on. The and arrows next to each field indicate that the field will be sorted ascending or descending, respectively.

Exporting data

After setting your filters, fields and sorting options, select the type of file to be created (dBase, Microsoft Excel or Microsoft Access) and then name the file to be created. You can use the icon for help in choosing where to save your file.

Click on the **Export** button.

After GMS exports your data, it shows three links:

Add to a list	Adds all of the people who were exported to a list.
Remove from a list	Removes all of the people who were exported to a list.
Mark as printed	If you were using this for an external mail merge, use this tool to post "Letters printed" records for the people who were printed here. You would do that to keep track of who's received what mailings and when, both to filter on it later as well as to see when you've communicated with various people.

Bulk Value Updater

Concepts

The Bulk Entrant Value Updater is a tool for mass updating records of various types:

- People
- Certifications
- Addresses
- Assignments
- Hours records
- Job definitions
- Comments
- Job associations

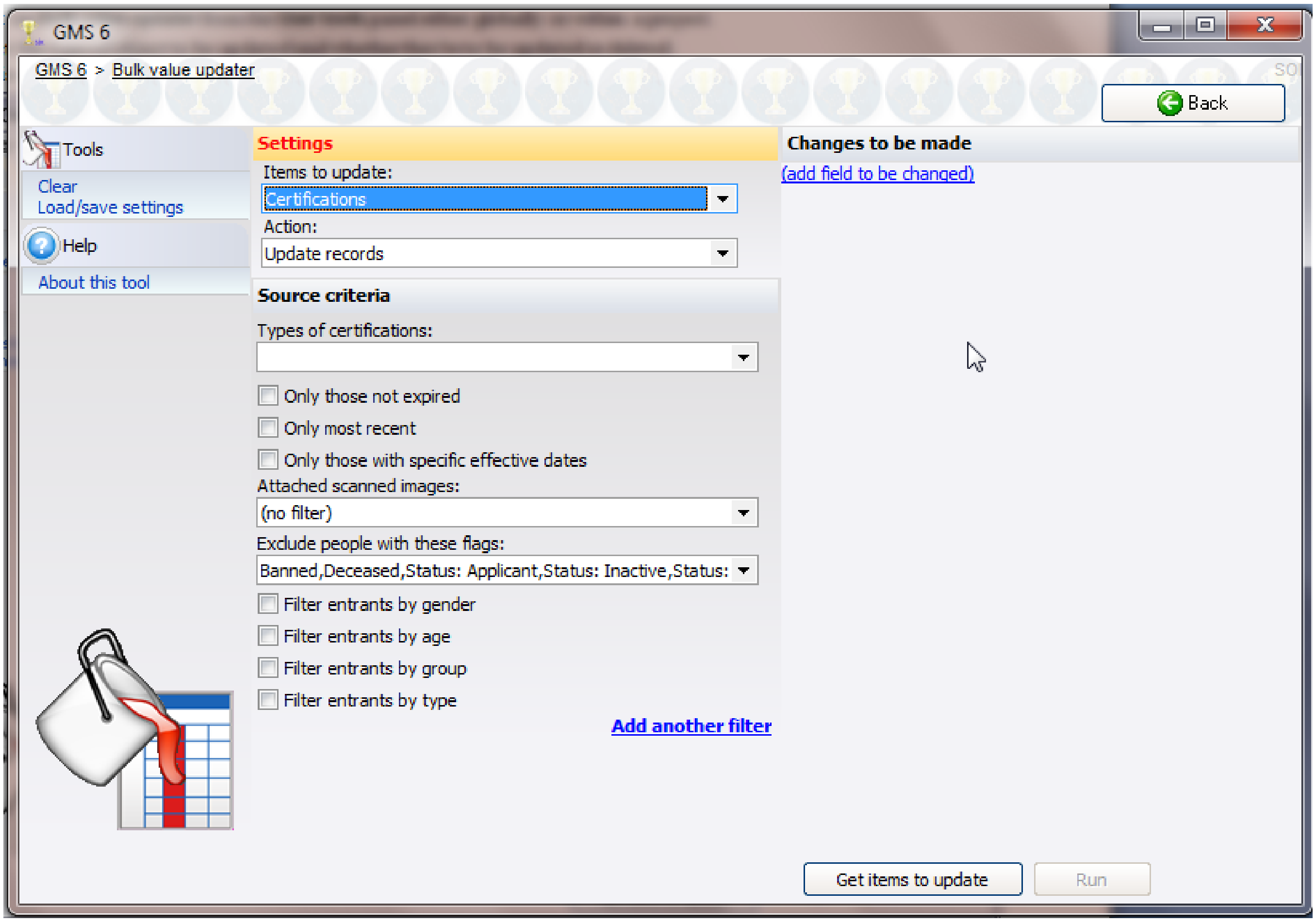
On the left side under Settings, you specify the criteria for the records to be updated. On the right under New values you enter the aspects of those records to be changed. Certifications and assignments can be deleted here in bulk, people can only be updated.

Caution:	If a user has access to this tool, he can completely bypass GMS security permissions for changing, deleting and updating objects - even those he has no rights to.
Caution:	Changes made here cannot be un-done automatically. If you've accidentally changed everyone's first name to "George", you'll have to either manually re-enter all of the original names, or restore from a backup.
Caution:	We highly recommend doing a backup before beginning this process.

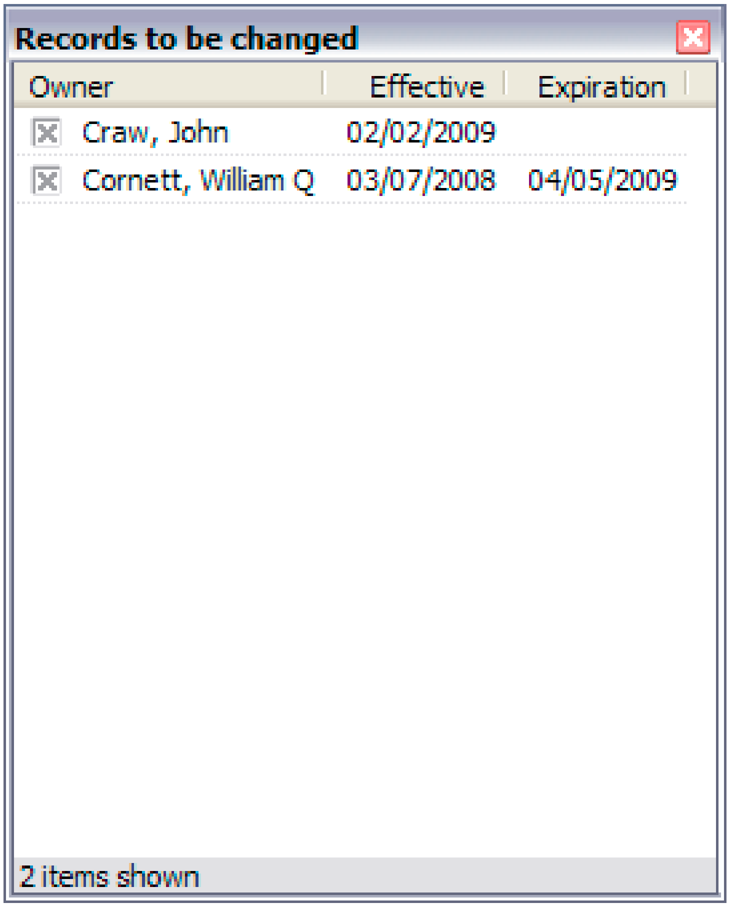
Using the Bulk Value Updater

In this example, we've had a rules change: AED trainings now are valid for two years instead of one. So we're going to take all of the AED certifications for which a Individual received training in 2008 and add 365 days to their expiration date.

1. Click on Bulk value updater from the User tools panel either globally or within a Games.
2. Select the type of object to be updated and whether they're to be updated or deleted.
   In this case, select "Certifications".



3. Enter the criteria which determine the records to be affected, these criteria will depend on the type of object selected. For this example, select "AED" as the Certification type, then (add) a filter requiring a DATE OF LAST TRAINING between 1/1/2008 and 12/31/2008.
4. On the right side, add one or more fields to be updated, along with the rules for their new values. In this case, click (add field) to add 365 days to the "Expiration date", and set the "Comments" to a value reflecting this so we know later on what we did.
5. Click **Get items to update**. GMS will find all of the records which meet your criteria, and show them to you on screen.

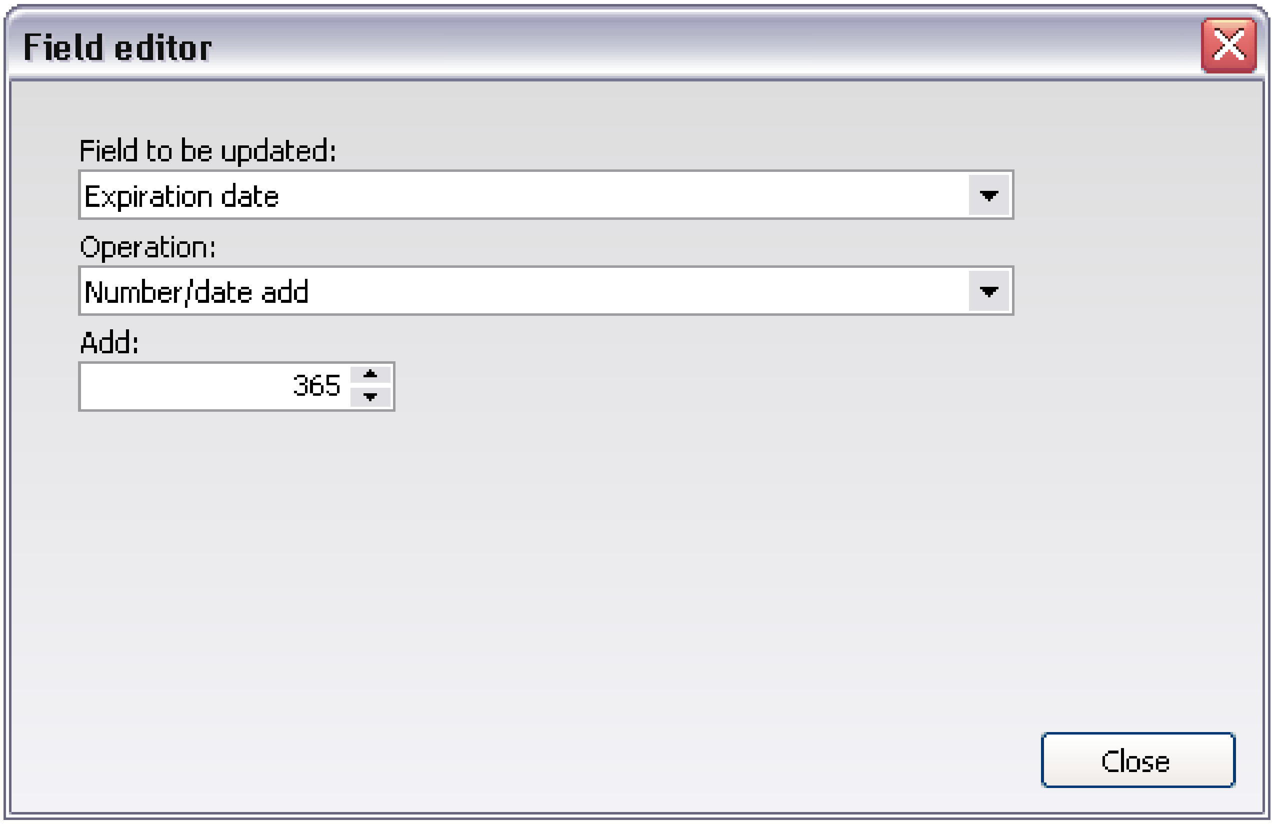


6. Verify that your criteria brought the expected results, then select which of these should be updated. Use the All/None/Reverse tools on the right-click menu to do this in bulk.
7. Click the **Run** button. GMS will prompt you one last time with the count of records to be updated, after confirming this, it will start the update process.
8. GMS will show you a report of all of the records which were changed, along with the values, both original and new.

Tip: Use the Load/save settings links on the left side to save the current settings, both criteria and new values, for later use, or to re-use previously saved settings.

New Values

New values are the fields which will be updated. Click on the (add field to be changed) link to select a field for the person, certification or assignment to be updated, then the operation to be applied to that field. The operations available depend on the type of data each field contains.



Operation	Description
Replace with a specific value	Replaces the existing value with one that you enter here.
Erase existing value	For numeric fields, sets them to zero. For checklist fields removes all checked values. For all other field types, erases them (sets them to blank).
Add values to list	For checklist fields only, adds additional checked items to the existing list of checked values.
Remove values from list	For checklist fields only, removes these items to the existing list of checked values.
Number/date add	For numeric fields, adds this value to the existing one. For date fields, adds this number of days to the existing value.
Number/date subtract	For numeric fields, subtracts this value to the existing one. For date fields, subtracts this number of days from the existing value.
Number multiply	Multiplies the current value by the one you enter.
Search and replace	For text and memo fields, does a simple search for existing text values, then replaces the matching value with the new value, which can be blank.
Append text	Adds text to an existing string or memo field.
Assign the value of another field	Copies the value from another field to this one, only fields of the same or compatible type will be shown as options.
Assign a new time value only	For date/time fields like "Start" for assignments, changes only the time portion of the existing value to the one you select.
Assign a new date value	For date/time fields like "Start" for assignments, changes only the date portion of the

only	existing value to the one you select.

Assignments which are associated with job slots cannot be updated here, since they derive their values from their job slots.

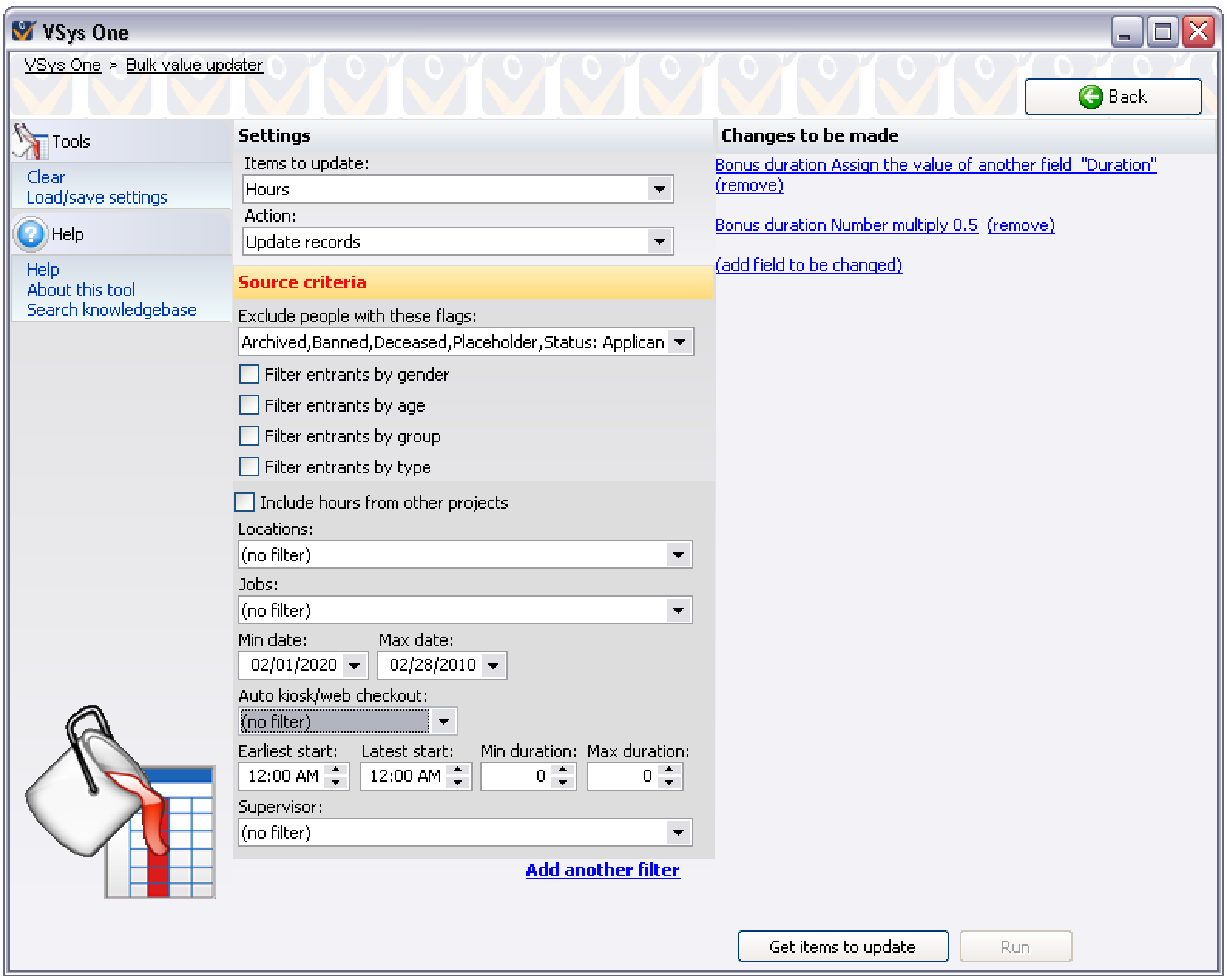
Chaining Values

Because these values are updated sequentially, meaning that the first value in the list is updated, followed by the second, then the third, etc., you can make multiple changes to a single field. For example, you can copy the value from one field to another field, then add ten to it. Or you can add some items to a checklist in one step, then remove others in the next.

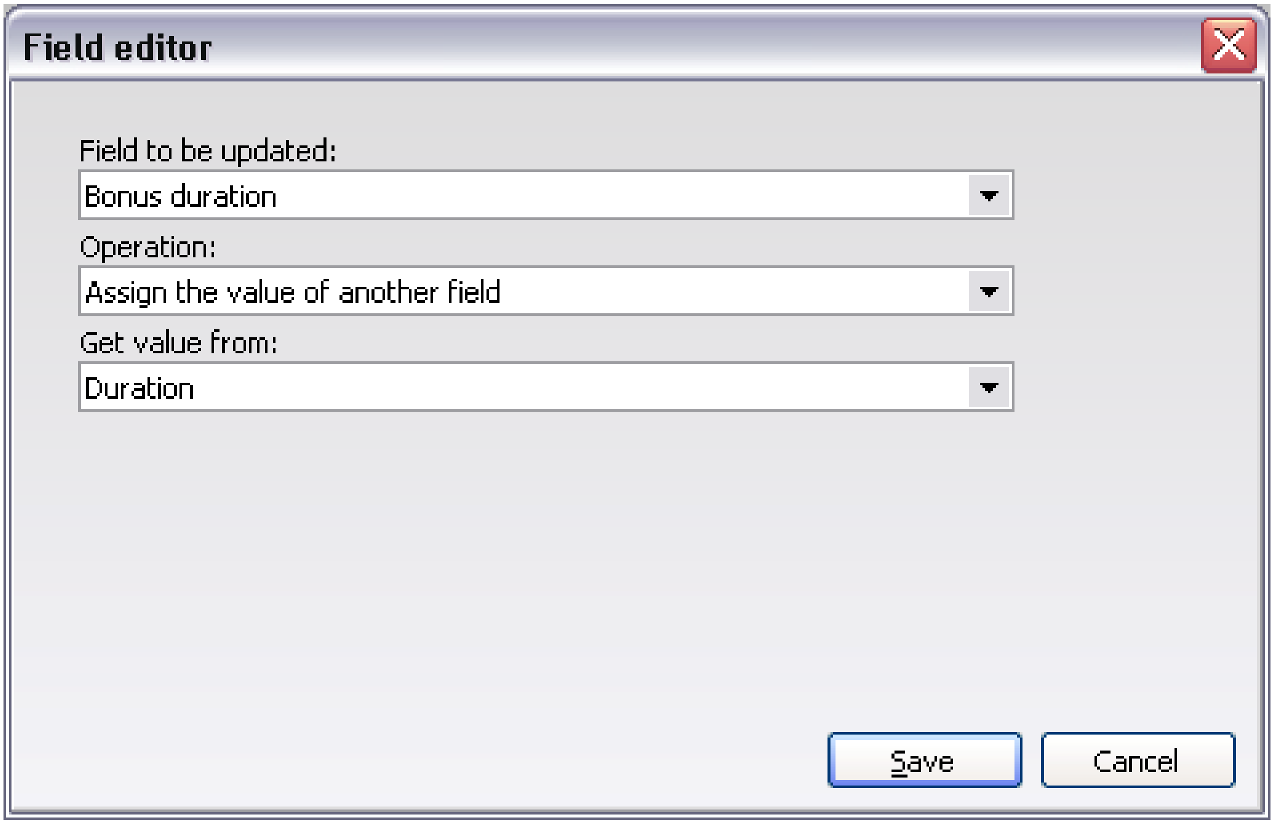
Bulk Value Updater Example

In this example, all Individuals who work "Emergency" jobs will get 50% of those worked hours as bonus hours. GMS lets you do this using the Bulk Value Updater in the User tools panel. (Note that bonus hours can be automatically calculated using Bonus hours crediting rules, we're just using this as an easy-to-understand example.)

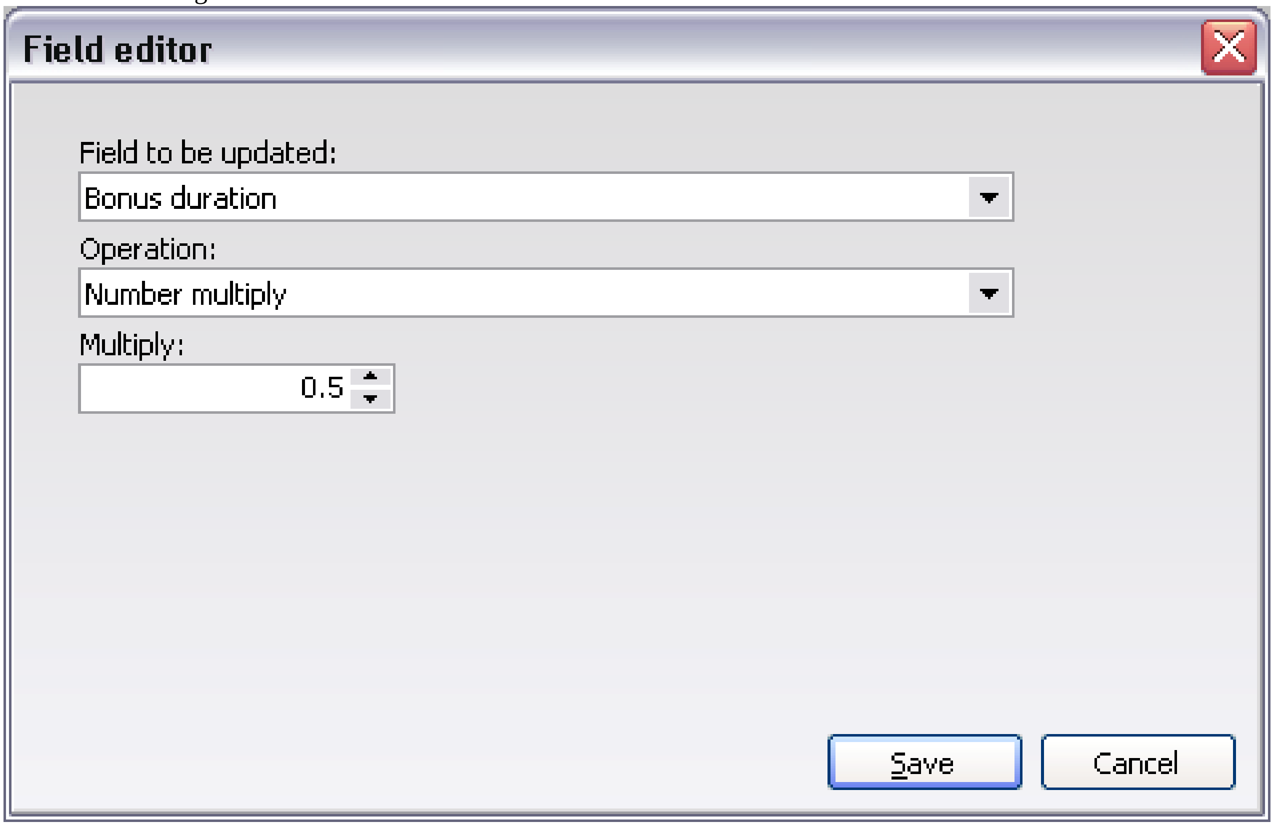
1. Within the Bulk Value Updater, set ITEMS TO UPDATE to Hours, and ACTION to Update records.
2. Put filters on your hours to select just the appropriate records, in this example, the job group Emergency, and the time window.



3. Click on the (add a field to be changed) link to bring up the first set of change steps.
4. Under FIELD TO BE UPDATED, choose Bonus duration and change GET VALUE FROM to Duration.
5. Click **Save**.



6. Click on the (add a field to be changed link) again to configure the second change. This is what we described as ***chaining values*** (page 157): first one set of changes are made and then the next.
7. Under FIELD TO BE UPDATED, choose Bonus duration and change it by multiplying it by 0.50.
8. Then click **Save** again.



9. Click on **Get items to update**. Verify that the hours records shown are the appropriate ones.
10. If they are in fact correct, click on **Run** to update these hours records.

Interactive File Importer (IFI)

Introduction

The Interactive File Importer, IFI, is an all-new take on file importing. Some big differences between IFI and the General File Importer in GMS and GMS are:

- Person lookup: In IFI, if you don't provide a person's unique 16-digit ID code, but you do provide enough personal data to search on, IFI will locate the most likely prospects. From those, you can choose which one matches, if any, or continue on creating a new person.
- Flexibility: IFI has many different modules for importing data. These can be enabled and disabled independently to import just specific types of data or in bulk to do multiple operations with a single record.
- Visual field mapping: In the old importer, GMS and GMS relied on the names of fields alone to determine what fields go where and how they should be used. IFI has a visual editor to let you indicate what fields are used and supply multiple (or no) target for each field. This means that just about any file can be imported without first having to modify its column names.

Caution: We strongly recommend doing a backup of your data before using IFI.

Concepts

IFI is a tool for importing data from non-GMS and non-GMS files to modify or add to the data in GMS 6. These files can be from Microsoft Excel (.xls), dBase (.dbf) files, or tab-delimited files created by any other application.

What can you import with IFI?

- Personal data for people, including creating new people or deleting people in bulk
- Addresses
- Certifications, including background check information
- Custom field values
- Comment records
- Individual images
- Lists (adding people to/removing people from)
- Groups, including creating new ones and editing existing ones
- Register people in Games, including adding new people, editing existing ones or deleting people from a Games
- Locations
- Training records
- Delegations in a Games, including creating new ones and editing existing ones

Some of these are available globally (outside of a Games), some are available only within a Games.

IFI Tasks

There are eight different import tasks, and these tell IFI what you're trying to accomplish by importing this file.

Create/update people (outside of a Games): Updates one person per record in the incoming data. Things you can do in this task: create/update or delete a person, add/update addresses, add/update/delete certifications, update custom fields values, add/remove from lists, update skills, requests, availability, etc.

Add/remove people from lists (outside of a Games): Adds or removes people from standard lists (you can't change a person's presence on an Intellilist, since they're automatically calculated).

Add/update training registrations and results (outside of a Games): Creates, edits and deletes training records.

Update addresses associated with people (outside of a Games): Adds or updates address information for the given person.

Add/update groups globally (outside of a Games): Creates or edits groups, which are how people in GMS are organized globally. Groups are found by their existing name.

Add/update locations (both globally and within a Games): Creates and edits locations and their attributes for that context (either globally or the current Games).

Import, update and register people in this Games (only within a Games): Lets you add, edit, and delete people from the current Games, as well as modify that person's personal information. Use this to bulk register people into a Games or modify their status within the Games.

Add/update delegations in this Games (only within a Games): Another module used primarily for setting up a Games, this task lets you create and edit delegations. Once created, a delegation cannot be deleted using IFI (it can be edited), but it may be edited or deleted manually.

Using IFI

We strongly recommend doing a backup before working with IFI.

Start by determining the type of information you want to import, and then select the most appropriate task above. Note: you can import the same file more than once in order to process bits of data which can't be imported in one pass. (To see what fields are available, click on the Print valid fields report link. This gives you, grouped by module, a listing of what fields can be imported.)

Next, open the file you want to import. The file must not be open by any other program when IFI tries to open it or use it. If IFI is able to open the file successfully, it will show you the fields in that file and bring up more tools on the left side.

Next to each field in your file, IFI will show the ways it will use that field. These are called field mappings. After opening the file, IFI will automatically try to map the fields it expects to the fields that you provide. Some of these mappings may be wrong, some may not be made at all. You need to go through and verify that the fields you want imported are mapped to the appropriate module fields. A quick sanity check is to click on the Verify field matches link: this will tell you, by module, if any required fields are missing.

A few fields are special:

OWNER	For all tasks focused around people, this field is the person's 16-digit ID code. If you don't know the person's code, you can leave this field blank, but the field must be provided for these tasks. When people are looked up or created, IFI will fill in this field with the person's ID code.
PROCESSED	This field is used in all tasks and is always required. After IFI imports a record, it will put the value TRUE into this field, marking the record as processed. Any record which has TRUE in this field will be ignored. This lets you partially import a file and then pick up where you left off, or tell IFI to ignore specific records.
PROCESSING LOG	Used for all tasks, but not required. If it's present, IFI will put into this field all of the notes it generated when working with each record. This is very handy for finding errors when you run in test mode, letting you go back and correct the problems found without having to refer to a printed document.

In most cases, field names should be self-explanatory. Where they are not, you may find an explanation for the field in the *module-specific notes* (page 163).

You can activate de-activated modules as necessary. For example, if your data has people and Individual hours in it but you only want to import the hours, deactivate the "People" module (leaving "Person lookup" active), and GMS won't try to update the person's personal data. To change a module's status, click on the Active or Disabled link next to its name on the left. Modules which don't appear here are either not applicable to the current task, or which don't have any fields mapped to them.

Test mode tells IFI to work through the file record by record and report on what it would do if it was not in test mode. If the "Person lookup" module is active, it will walk you through the process of finding each person, and will save that ID code into the OWNER field. You should always use test mode before a live import to make sure that there are no important problems with your file, since you are making a lot of changes at once and they may be hard to un-do later. And most likely, the reason you are using IFI is to reduce how many individual changes you are making.

Tools

Auto-match fields: tells IFI to un-do any field mappings you've created and try to automatically determine what incoming fields go to which modules.

Verify field matches: has each active module check to see that any required fields are present.

Module-specific options: shows a dialog with options that are appropriate to the modules which are enabled.

Save settings: saves the import task, field mappings and module-specific options you've specified into a file so you can re-use them again later. This is very handy if you import the same type of file more than once.

Load settings: loads a saved task, field mappings and module-specific options. This will fail if the file you open has a task which isn't valid for where you are now.

Reload file: if you've made changes to the file you're trying to import using another program, click this to have IFI reload the file to see the latest update. Note: IFI may fail if it's not able to open the file, which will happen with Excel files if Excel still has them open.

Clear "Processed" field: for all records in the current file, takes the PROCESSED field and sets it to FALSE. Use this if you're importing multiple types of data in different tasks, e.g. crediting Individual hours and making assignments in one file.

Print valid fields report: for all import modules valid for the current task, prints a list of the fields and values which can be used.

IFI Module-Specific Notes

Addresses

Addresses are broken out by address type, and you can apply fields to the type of address that you're importing, e.g. "Home". A few fields – phone and e-mail – can be entered without specifying an address type. With these, IFI will try to find the best address to update, and if it can't find one, it will create a "Home" address. Phone number fields do not have to be formatted, and if a default phone format has been set up, IFI will use that.

The "Bad phone number" and "Bad e-mail address" fields are special. These are used to mark a phone number or e-mail address as bad, and they work across all address types. To mark a phone number or e-mail address as not bad, just import that value into an appropriate field and GMS will remove the "Bad" flag.

IFI always updates or creates addresses by type, it never deletes them, so there is no "Action" field.

When importing e-mail addresses,

- If no addresses exist for the person, IFI will create a home address and add that e-mail address.
- If only one address exists (any kind), IFI will update with incoming value.
- If multiple addresses exist, with no primary identified, IFI will update the home address.
- If multiple addresses exist, with a primary address identified, IFI will update that address.
- If multiple home addresses exist, IFI will arbitrarily update one of them.

Certifications

Certifications include background check requests and results.

Action can hold "Create", "C", "Update", "U", "Update/create", "*", "Delete", or "d". These fields are not case-sensitive, and indicate what IFI should do for this type of certification. Specifying "Create" will always make a new certification with this data, unless the person is not allowed to have more than one of this type of certification, in which case it will fail. "Update" will only update an existing certification of this type, it will fail if the person does not have one. "Update/create" will update an existing one if present, otherwise it will make a new one. "Delete" will delete an existing certification if present, and fail if the person does not have one. In the case of "Delete", if more than one is present, IFI will work with the one which matches the effective date specified, if provided, otherwise it will work with the first one it finds.

You can import multiple types of certifications, each with a different action, since each action is associated with a specific type of certification.

General

When importing a record which involves a location, you can specify the location using either its hierarchical value, e.g. "Troy.RPI.Union.Room 308" or by its friendly description, "RPI Union room 308" as designated in the location's FULL DESCRIPTION field.

Lists

Action 1, Action 2, etc. can hold "Add", "a", "Delete", or "d". These fields are not case-sensitive, and indicate what IFI should do to the current person for this list. For each list, if an action is not specified, it is assumed to be "add". Note: you obviously cannot add or remove people in Intellilists from here.

People

Action can hold "Create", "C", "Update", "U", "Delete", or "d". These fields are not case-sensitive, and indicate what IFI should do for this person. Specifying "Create" will always make a new person with this data, unless the person already exists, in which case it will fail. "Update" will only update an existing person, and fail if the person does not exist. "Delete" will delete an existing person if present, and fail if the person does not exist.

Caution: "Delete" is very dangerous! It deletes the person and all of his information, including certifications, custom fields, letters, Individual hours, and others **with no further prompting**.

Games people

Action can hold “Add”, “A”, “Edit”, “E”, “Edit/add”, “*”, “Delete”, or “d”. These fields are not case-sensitive, and indicate what IFI should do for this person. Specifying “Add” will always add this person, unless the person already exists or cannot be registered, in which case it will fail. “Edit” will only update an existing person, and fail if the person is not registered. “Edit/add” will edit the person if registered, or add if not. “Delete” will delete an existing person from the Games, and fail if the person does not exist. “Delete” does not delete the person himself, just his registration from this Games.

When editing an existing person, you can change the person’s role and/or delegation. Use the “New role” and/or “New delegation” fields for this. When adding or deleting a person, these fields are ignored.

Notes On Fields and How They're Interpreted

For most types of fields, no value (blank) is ignored. This means that you can’t erase a text, combo, checklist or memo field by leaving it blank in the import file.

Tip: Hint: Put an exclamation point all by itself in the field to erase it. IFI will interpret the value as blank, but still use it to overwrite the value in the data.

Boolean (yes/no) – “TRUE”, “T”, “Y”, “1” and “S” are considered to be “true”, “FALSE”, “F”, “N”, and “0” are “false”.

Combo – not case-sensitive, spaces and punctuation ignored. For both this and checklist fields, you can enter the codes (where applicable) or the descriptions. Note: if more than one item has the same description, IFI will use whichever one it comes across first. In cases like these, you should use the code, which is always unique.

Checklist – separated by commas, not case-sensitive, spaces and punctuation ignored. Preceding the value with a "+" (plus) symbol will edit the existing value, adding the new value(s) to the list. Preceding it with "-" (negative) edits the existing value, removing the new value(s) from the list.

Date, time and datetime – for Excel and dBase, enter them such that the application (Excel, dBase) understands them. For text files, use mm/dd/yyyy format.

Person Lookup

For all tasks which are focused around people (Create/update people, Credit Individuals with hours globally, Add/remove people from lists, and others), you have three options:

- Include the person’s 16-digit ID code in the OWNER field. This will tell IFI to simply use and update that person without any further interaction.
- Leave the person’s OWNER field blank, enable the “Person lookup” module, and provide some data with which IFI can search for the person. For each record, IFI will show you a list of people who match your criteria, and let you select one of them to be used. If the “People” module is enabled and sufficient data to create a new person is provided, IFI will also let you create a brand-new person here.
- Leave the person’s OWNER field blank, or fill it with the ID code you want used for a new person, and check the box IF A PERSON DOES NOT EXIST, CREATE A NEW ONE… in the “Module specific options” dialog. If you do this, IFI will create a new person every time it finds a record which does not refer to a valid person. This is great if you’re importing new people that you know are not already in your data, but dangerous since it can create a lot of duplicate people if they already exist.

If none of these apply, IFI will ignore that record and continue on to the next.

For these people-focused tasks, you should always enable the “Person lookup” module, and provide it as many fields as you have available. The more data you give it, the better a job it will do in finding the person in GMS, and in sorting the most likely prospects to the top.

These are the fields that the person lookup module can use. All of them refer to the current person.

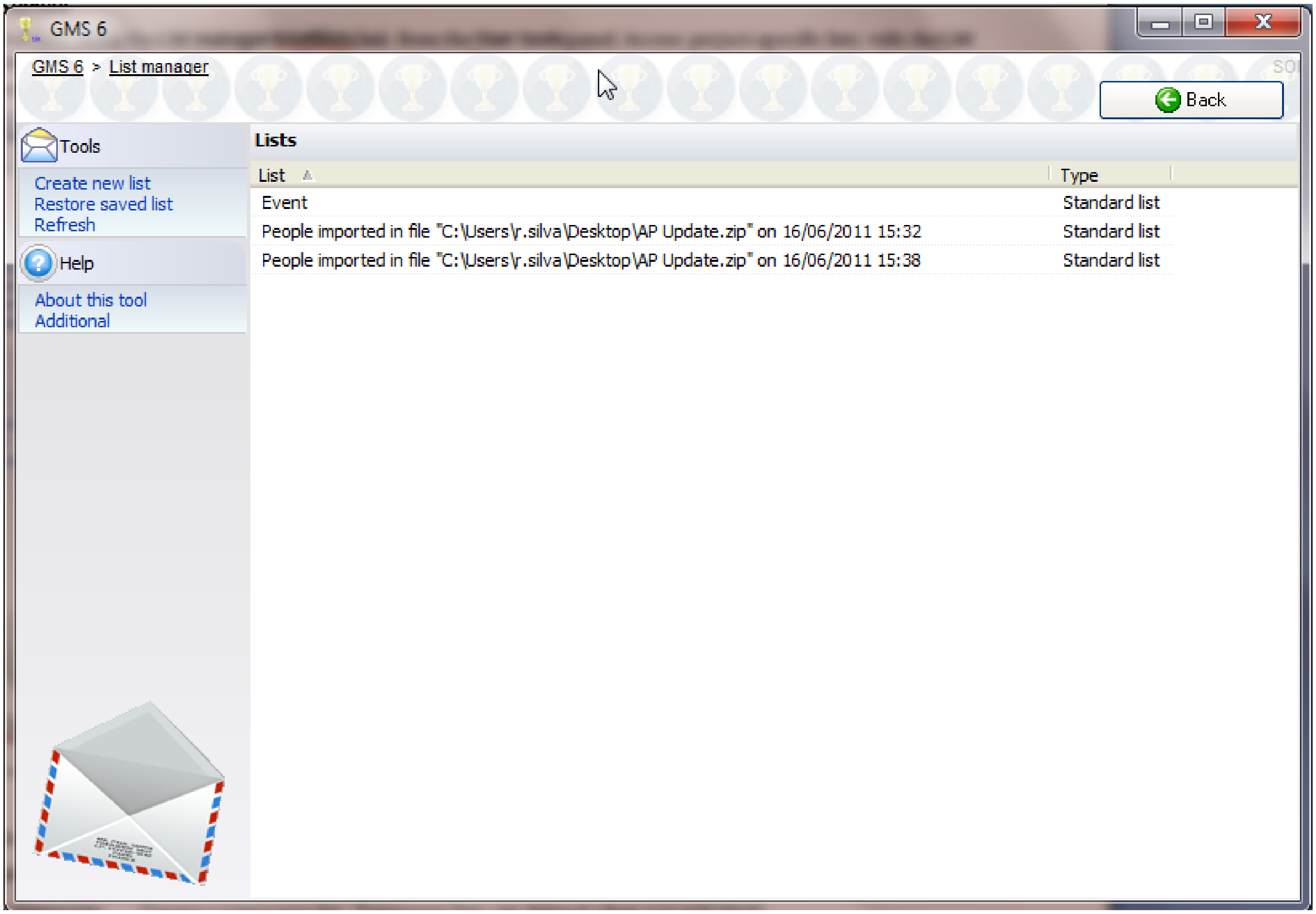
Field	Explanation	Example value
FAMILY NAME	Last name	`Doe`
FIRST NAME	Given name	`John`
FULL NAME	Given name and family name	`John M. Doe`
MIDDLE NAME		`M`
NAME BACKWARDS	Family and given name, family name first	`Doe, John M`

GENDER		M
PHONE	Any phone number. Any formatting is ignored	(888) 988-4467
E-MAIL	Any standard e-mail address, capitalization is ignored	support@ bespoke.com
AGE	Age as of the current date	37
DOB	Date of birth. For dBase and Excel, enter dates so that the source program understands them; for tab-delimited, use mm/dd/yyyy format	04/27/1970
ADDRESS	First line of any address	PO Box 4406
CITY	City/town/village for any address	Clifton Park
STATE	State/province for any address	NY
POSTAL CODE	Zip/postal code for any address	12065
PERSON NUMBER	The PERSON NUMBER field on the Additional data panel	134
REFERENCE ID	For people previously imported from IndividualWorks or other programs, the ID they had in that previous application	1698

List Manager

Getting Started

Set up global lists using the List manager/Intellilists link from the User tools panel. Access Games-specific lists with the List manager/Intellilist link on the User tools panel within a Games. Click on any list here to open it and bring up the list editor appropriate for that list.



Tools

These tools show on the left side of the screen.

Create new list	Creates a new basic list.
Create new temporary list	Creates a temporary list. Temporary lists are deleted when you exit GMS.
Create new Intellilist	Creates a new Intellilist.
Restore saved list	Restores a backed-up list. If the list already exists, it will be deleted, but not before prompting the user for confirmation.
Refresh	Reloads the displayed contents of the list. Use this when other users may have made other changes while you're viewing its contents. Not available when the **Save** button is visible.

On the right-click menu

Right-click on a person on the list to modify individual lists or perform other actions.

Edit	Opens the list for editing. Note: only one person at a time may edit a particular list.

Duplicate	Makes a copy of this list and its entrants.
Delete	Deletes this list. Does not affect the people on the list beyond removing them from the list.
Empty list	Removes all people from this list. Does not affect the people on the list beyond removing them from the list. Not available on Intellilists.
Backup list	Backs up the contents of the list into a .zip file which can be used to import the list into another copy of GMS 6.
Copy e-mail address to the clipboard	Copies the e-mail addresses, where available, for all of the people on the current list to the clipboard.
Send a letter	Brings up a list of available letter templates. Selecting one will merge the people in the current list with that template for mailing.
Create a new list	Creates a new list of the type you specify.
Restore a saved list	Restores a backed-up list. If the list already exists, it will be deleted, but not before prompting the user for confirmation.

Name Tags, Badges and Credentials

Concepts

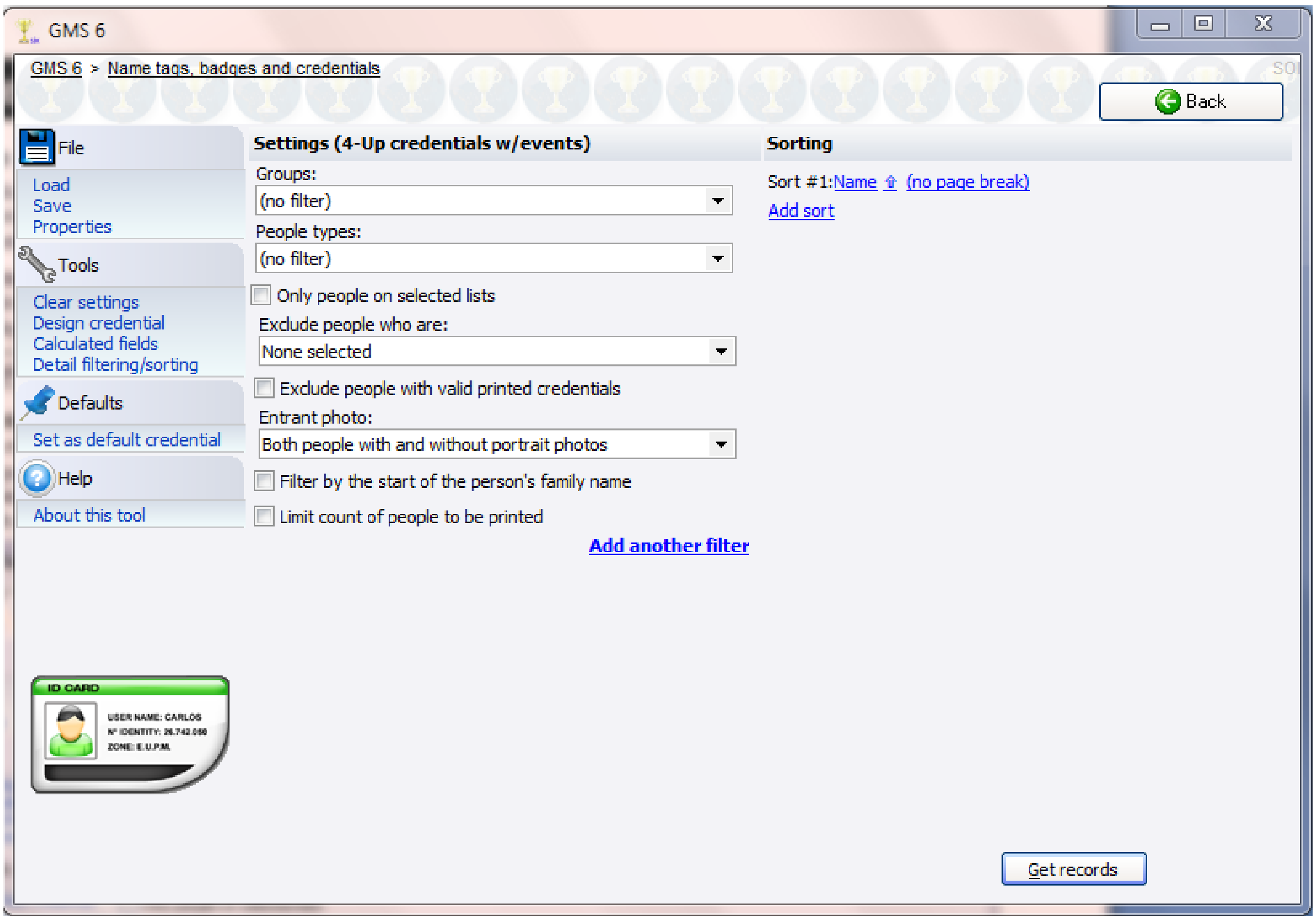
Credentials, name tags and badges are all the same thing: ID passes which identify Individuals and staff and allow them access to the appropriate places at your Games. GMS 6 has several built-in credentials types, and you can define your own filters and contents to make the credentials most appropriate for your organization.

After printing, you can optionally save the individual credentials for each person. This is especially useful if you print credentials incrementally during the registration process: include in your criteria a rule that excludes people who already have credentials printed.

Only people registered in a Games can have credentials printed for that Games.

Getting started

1. From within a Games, open up the Credentials tool by clicking on the Name tags, badges and credentials link on the User tools panel from within the Games.
   To print credentials globally, click on the Name tags, badges and credentials link on the User tools panel from the main GMS 6 screen.



2. Choose a built-in credentials type or load one that you've previously saved by clicking on the Load link. If none of these suit your purposes, choose one that is closest to what you're looking for and then modify it using the Design report link.

Filters

People are only included in this export if they meet *all* of the criteria you specify.

GROUPS/DELEGATIONS	Only people in these groups (globally) or delegations (in a Games) are included.

PEOPLE TYPES/ENTRANT ROLES	Only these types of people (globally) or people in these roles (in a Games) are included.
INDIVIDUAL TYPES	Filters by Individual type.
SCRATCHED PEOPLE (only within a Games)	Only people not scratched, Only scratched people or (any).
FILTER BY ASSIGNMENTS	Only people who have one or more assignments meeting your criteria here will be included.
ONLY PEOPLE ON ONE OR MORE LISTS	Check this to filter recipients to only people on one or more of the lists you check.
TEAM FILTERS	Include only people who are teams, exclude people who are teams, or include both.
EXCLUDE PEOPLE WHO ARE	Filters to exclude people who are inactive, prospects, applicants, deceased, inactive, placeholder or banned.
EXCLUDE PEOPLE WITH VALID PRINTED CREDENTIALS	Lets you eliminate people who already have a valid credential printed, or just one printed for this Games.
ENTRANT PHOTO	Lets you exclude or include people based on whether or not they have a portrait photo.
FILTER BY THE START OF THE PERSON'S FAMILY NAME	Select only those within a certain letter range based on an individual's family name, for example all the last names beginning with A, B and C.
LIMIT COUNT OF PEOPLE TO BE PRINTED	
ADDRESSES	If you have a preference as to what type of address should be used (for people with more than one address), or to limit credentials to specific address types, add one or more address types here. GMS will look for an address of each type starting from the top, and use that one if it meets the further criteria below. Adding the address type (any) will take any address type that meets the remaining criteria. Putting (any) after other address types makes GMS use the others first if available, otherwise whatever other kinds it can find.

Sorting

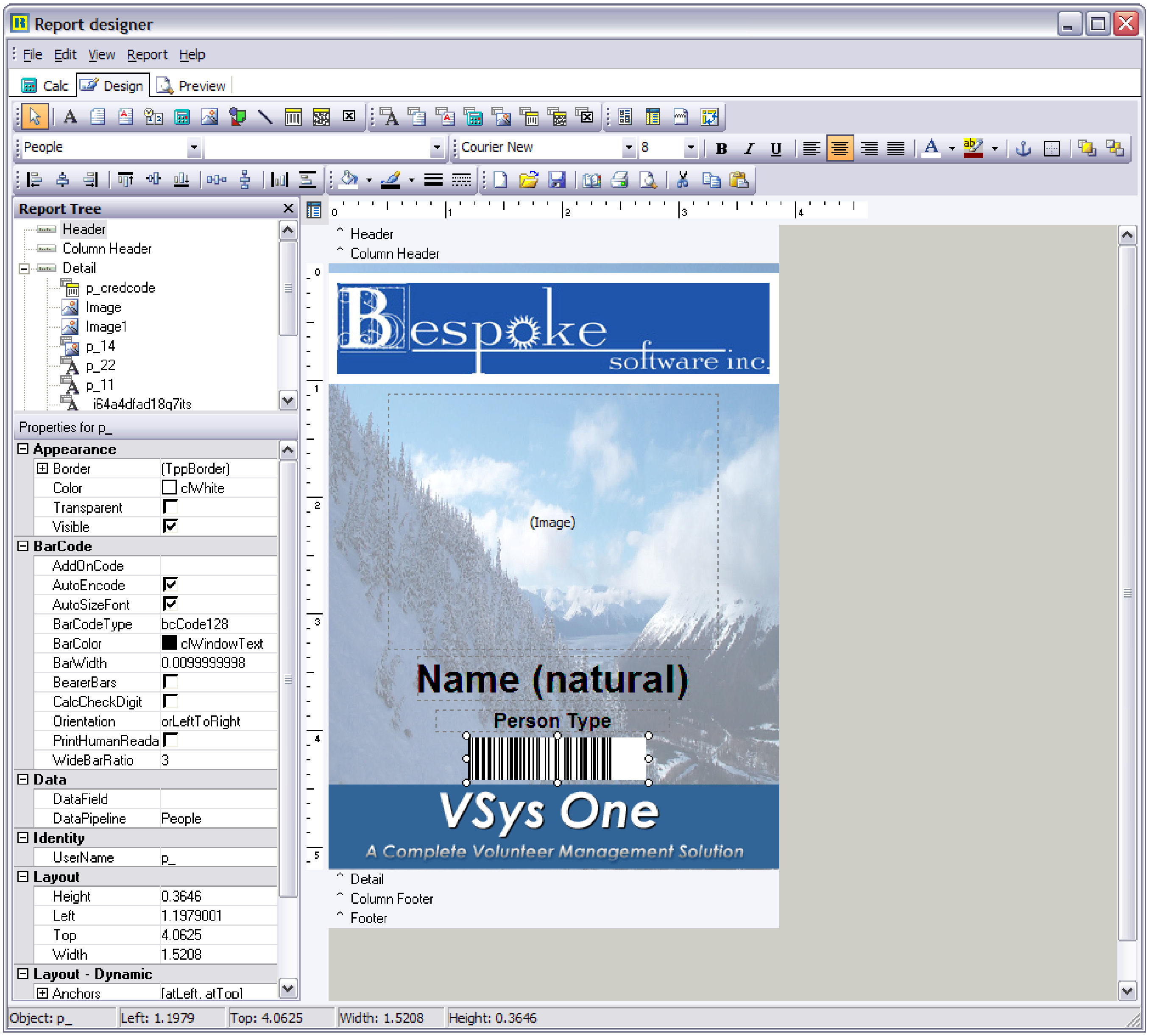
Add one or more sort criteria to make GMS sort the credential into a particular order for you. Credentials will first be sorted by the topmost field, then the second field, then the third, and so on. The and arrows next to each field indicate that the field will be sorted ascending or descending, respectively. Checking (no page break) or with page break turns page breaks for this field on and off. You might use page breaks to separate credentials by delegation or by role.

Printing

After loading or designing your credential and entering your filters, click on the **Get records** button.

Credentials Designer

Clicking on the Design credential link brings up the Report Designer (a credential is a special kind of report). Here you can add, remove and re-arrange fields. There are over a dozen field ***pipelines*** (page 121) with hundreds of fields available in the credential designer here, which looks like (and is) identical to the report designer tool. See *Advanced/Custom Reports* (page 118) for more information on how to use this tool.



When you are done, close the Report designer window, then click Save in the Name tags, badges and credentials tool to save your filters and layout for later use. They'll be filed under the name you give, and will be available next time you click on the LOAD link.

Adding a barcode

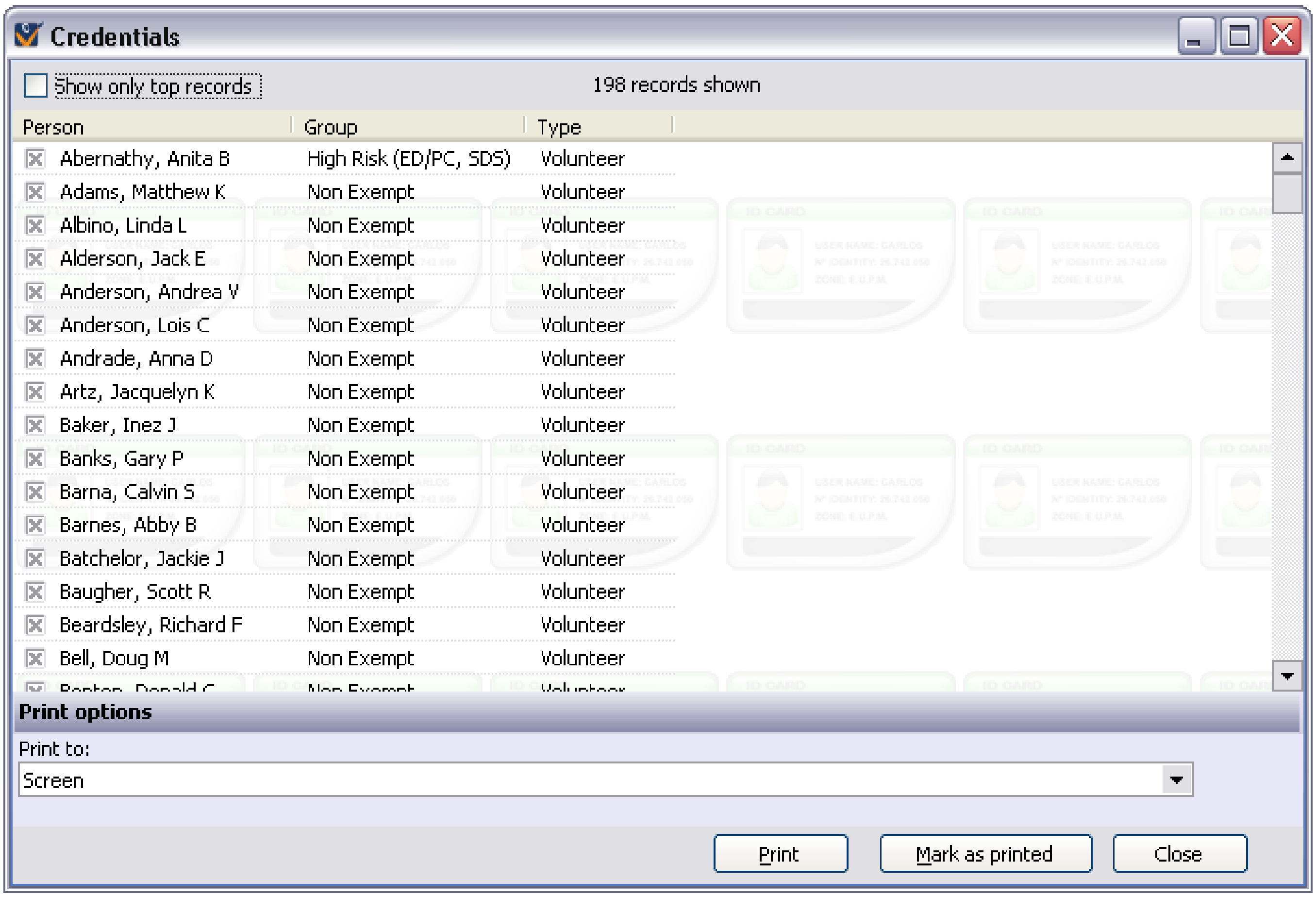
To make a credential which can be used by the Individual to sign in at a kiosk using a barcode scanner, include the field CREDENTIAL BARCODE from the PEOPLE pipeline.

1. Begin by placing a DBBarCode object on the report (the  button).
2. Along the top, select the PEOPLE pipeline, then the CREDENTIAL BARCODE field.
3. On the Properties pane on the left, under **BarCode**, set the option BARCODETYPE to bcCode128. This uses the Code128 encoding scheme for the barcode, which is the only one which can encode the appropriate data.

When the credential is printed and saved, this barcode can be scanned and the Individual can log in and log out without requiring a User ID or password.

Credentials Results

After clicking on the **Get records** button, GMS brings up a list of all of the people who met your criteria and for whom it will print credentials.



1. Verify that the people shown are what you expect. If they're wrong, click **Close** to go back and change your criteria.
2. Print one or two credentials to the screen to ensure that they look the way you want (select only one or two of them before clicking **Print**). If they're wrong, click **Close** to go back and re-design them.
3. Check the credentials that you want to print. By default, all will be checked. You can right-click on the list of credentials to check and un-check them in bulk.
4. Select the printer to send the credentials to.
5. Click the **Print** button to send the credentials to the printer.
6. If any credentials need to be re-printed, check only those credentials and print them again.
7. After all credentials have been printed and verified, check all of them and click on **Mark as printed**. This puts a notation in each person's record on their Credentials panel with the type of credential, Games, and today's date.
8. Click **Close** to return to the credentials tool.

The SHOW ONLY TOP RECORDS checkbox lets you limit the number of credentials shown here to a smaller number. You'll commonly use this when your printer is slow or the number of credentials is very large. Enter the number that you want, then click on the Apply link. GMS will now only show that many credentials, and the **Print** and **Mark as printed** buttons will only work on the credentials that are shown.

Training Courses Setup

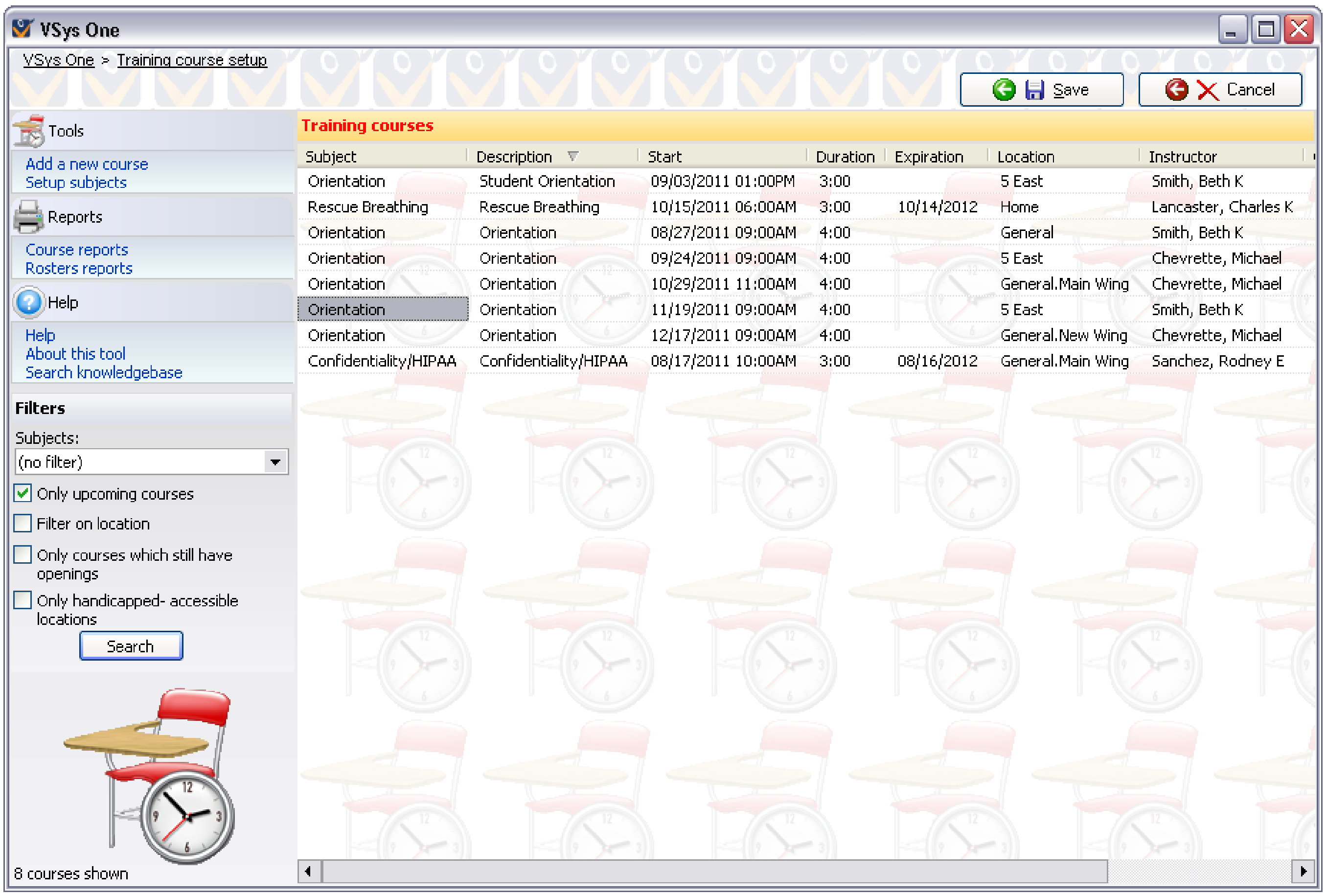
Concepts

Courses are actual classes teaching a specific subject. Courses are where you register students.

When to use this tool

- To track classes you offer to Individuals
- To track who is attending a specific training

Define training courses by clicking on Training courses on the Setup panel.



Tools

Add a new course	Defines a new course.
Setup subjects	Create, edit and delete training subjects. If you have any un-saved changes here, you'll be prompted to save them.
Course reports	Reports based on the courses, not their students, though students can be included in the reports.
Rosters report	Reports on the people in courses.

On the right-click menu

Right-click on a course on the list to modify individual courses or perform other actions.

Add	Define a new course.
Edit	Opens the course for editing.
Delete	Deletes this course. Deleting a course with students in it cause GMS to prompt you

whether to delete all of the training records of those students in this course, or to disconnect them from the course and leave all of the training records intact.

See this course's registrants	Opens up the course entrants list with the course's students. There you can edit, add, and delete entrants in this course.

Filters

By default, all upcoming courses show on this list. Use the filters on the right to change those criteria and list past courses, those within a specific date range, by subject, handicapped accessibility, location or whether the course still has openings for more students.

Enrolling People in Training Courses

People can be enrolled in a class from either the Person Editor or from the Training Courses in the Setup menu.

From the Person Editor, select Training on the left margin and follow the menus out to select a course you are offering.

From the Training course setup, right-click on any course and select See the course's registrants. From there use either the Enroll a person link or the Find people to enroll link.

Only the registrant statuses Complete, Registered, Pending, Failed, Unconfirmed, Waitlist and Incomplete count against a courses' enrollment capacity as you have defined it in the course properties. If you want to change the STATUS **of a individual enrolled in a course, right-click, select** This training record **and change the status. If you move someone from the waitlist into the course, choose** Pack waitlist **under the** Tools **menu to renumber the waitlist.**

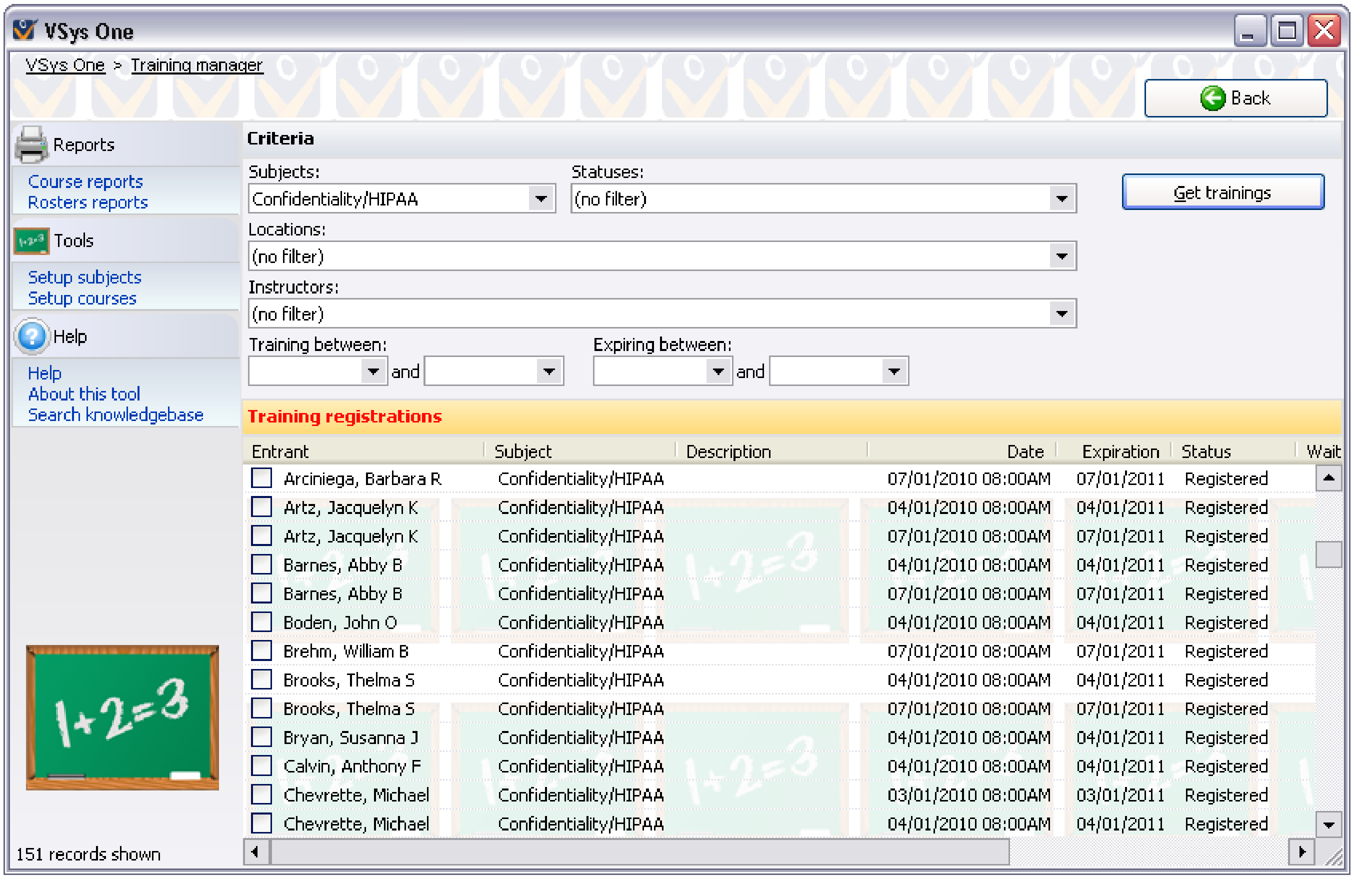
Training Manager

Concepts

The training manager lets you search for people who have gone through or are registered for training courses. The people listed here can be in different courses on different days.

When to use this tool

- To send letters to or print mailing labels for people based on their training registrations
- Change the status of multiple training records at once across different courses
- Delete training registrations en masse



Finding training records

1. From the User tools panel open the Training manager.
2. Use the filters at the top to select which training records to display
3. Click on the **Get trainings** button. This will bring up all of the training records which meet your criteria.

On the right-click menu

Right-click on a person on the list to modify individual people or perform other actions.

This training record	Edit record	Edits the training record itself.
	Delete	Deletes the training record.
	Edit entrant	Edits the person who is registered.
	Send a letter	Brings up a list of letter templates, selecting one of these will merge the training record with that template.
	Add "person" to a list	Adds this person to a temporary or permanent list.

Enroll a person (outside of a course)	Brings up the person lookup tool to let you search for a person, then give the person a training record with whatever properties you want.	
Select	All/None/Reverse, use these to check and un-check all records.	
Selected training records	Set status	Sets the status of all checked records.
	Send a letter	Brings up a list of letter templates, selecting one of these will merge all checked training records with that template.
	Print mailing labels	Prints any of the built-in mailing labels for the checked people.
	Delete	Deletes all checked records.
	Un-delete	Un-deletes all checked records.

Administrator Tools

Backing up the database

Concepts

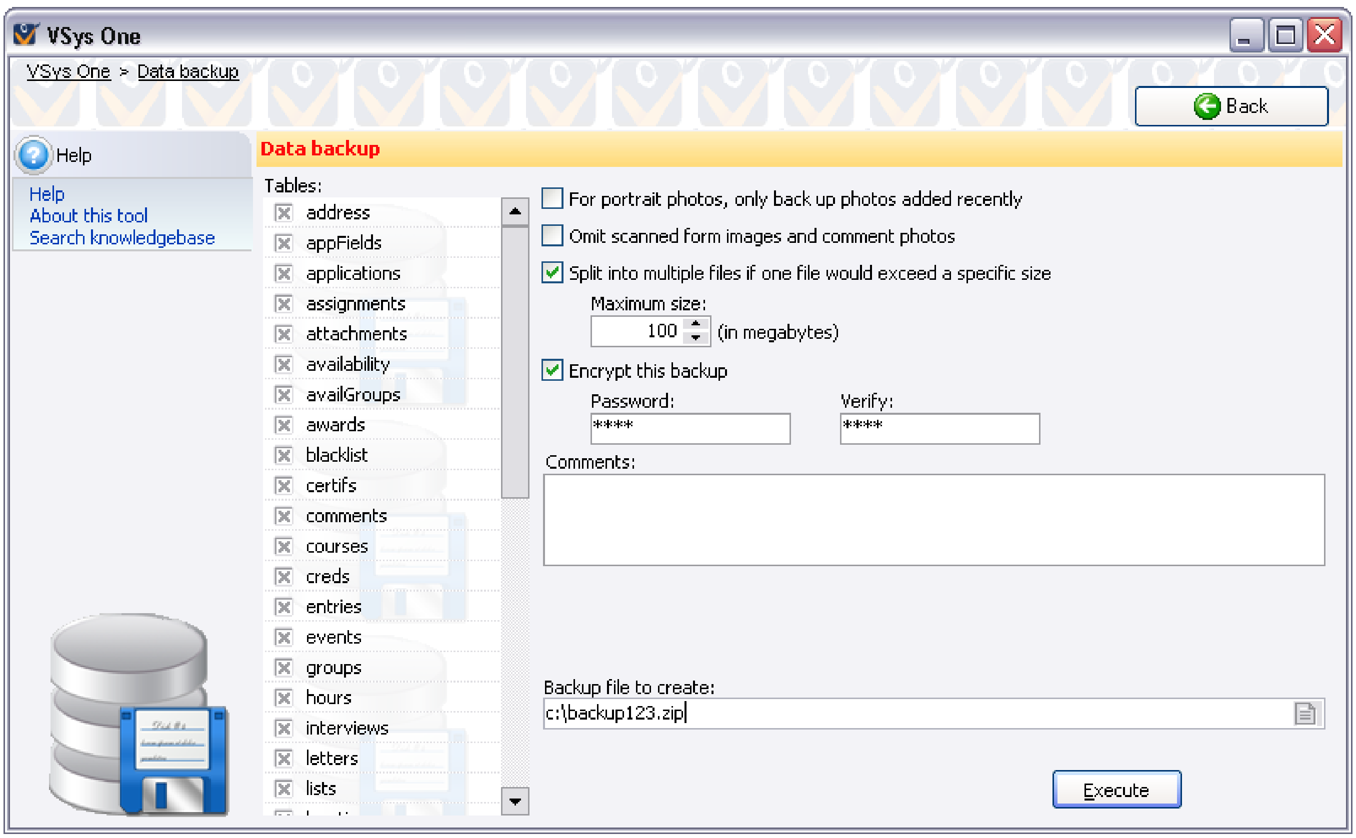
GMS Administrators are responsible for ensuring the system database is intact in the event of an emergency, hardware failure, or just to move it to another location. Backing up the database is critical in any of these situations and it should be performed on a regular basis.

- A GMS backup is one or more zip files containing encrypted and compressed copies of your data. When it comes time to restore from a backup, you must use GMS 6's restore mechanisms. You can't just unzip the backup to overwrite your existing tables.
- Backups can be run while other users are in GMS. There is no need to have other users exit GMS while you are making your backup.
- You can run this function at any time during the day. *We recommend that you make a backup of everything daily*.
- ***Backups can be run from the command line*** (page 277). This lets you run them using Windows scheduling tools.

Caution: If you use GMS as well as Vsys, be sure you *always use Vsys for your backups*, as Vsys backups fully back up both GMS and Vsys data. *GMS backups have only limited information and will not restore your Vsys data.*

Steps in This Task

1. From the GMS 6 main screen, on the Administrator tools panel, click on Back up your data.



Tip: By default, all of the tables except for "`zips`" are selected to be backed up. With the exception of that one table, you'll generally want to back up all of your tables.

2. Set your options below.

Field Names	Definitions and Comments
FOR PORTRAIT PHOTOS, ONLY BACK UP IMAGES ADDED RECENTLY	Check to include a person's photos that you added recently. If you check this, GMS will let you enter the date range that you consider "current". *Note: the backup file created then may be missing important data, such as the older, existing images that weren't in the date range.*
OMIT SCANNED FORM IMAGES AND COMMENT PHOTOS	Check to leave out scanned images associated with certifications and any images attached to comments. *Note: the backup file created then may be missing important data. All comments and scanned certification images would be excluded.*
BREAK UP BACKUP INTO MULTIPLE FILES IF ONE FILE WOULD EXCEED A SPECIFIC SIZE	Check to break the backup into multiple files if the backup file is very large and exceeds the size you specify in the MAXIMUM SIZE field. *You must archive all of the files that GMS makes here in order to restore the backup later*.
ENCRYPT THIS BACKUP	Check to encrypt the data. Enter a password, which must be identical in both fields. *If you lose or forget the password, your file cannot be restored*.

3. Enter the name of your backup file in the BACKUP FILE TO CREATE field. You can use the icon to browse to the appropriate folder.
4. To begin the backup process, click the **Execute** button. GMS will indicate its progress as it backs up individual tables.
5. When done, a message will be displayed showing that the data was successfully backed up along with the name and size of your backup file.

Magic: When GMS 6 makes a backup, it stores the data as Embedded NexusDB tables. GMS can restore these tables to any of its compatible databases. This means you can use the backup/restore process to make a backup on one system in Oracle, then restore it under SQL Server. Or go from SQL Server to NexusDB. Or any platform to another - GMS treats them all alike.

Check for Duplicated IDs

Concepts

Within GMS, all internal ID codes should be unique. However, occasionally, more than one record will contain the same ID code. The Check for duplicated IDs tool validates tables and checks for records that may have the same internal ID codes and corrects them so no two IDs are alike.

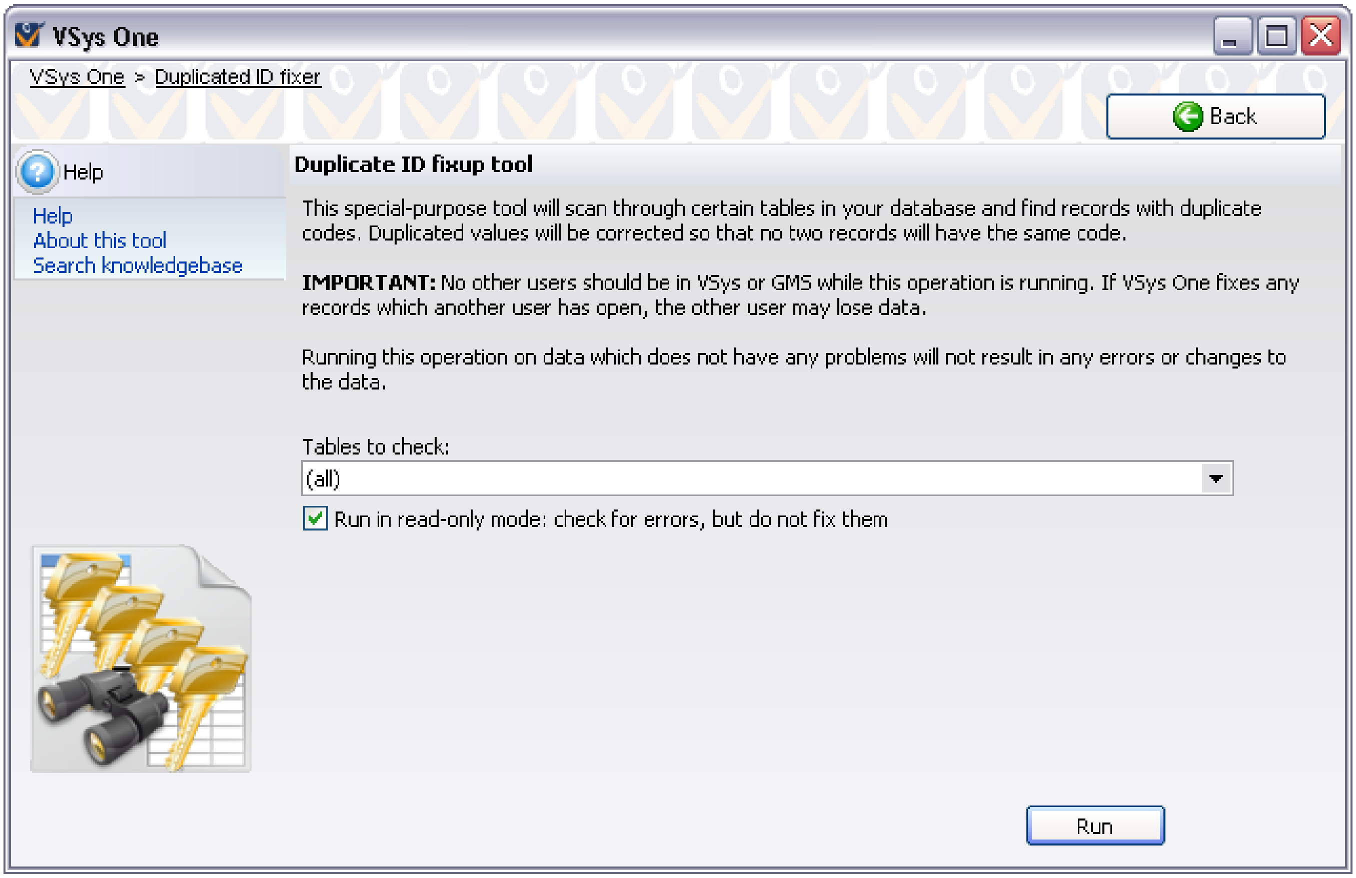
Caution: *GMS requires that all GMS and Vsys users other than the one running this tool have exited the application while it is fixing the duplicate codes, otherwise a user may lose data or their copy of GMS 6 may crash.* GMS will prevent more than one person being in this tool at a time.

When to Use

Follow the steps in this task when you receive word from Bespoke technical support that you need to find and fix duplicate IDs in the database.

Steps in This Task

1. Be sure all other users are out of GMS and GMS.
2. From the GMS 6 main screen, click the Administrator tools bar to open the panel, then click on Check for duplicated IDs.



GMS will check all entry and certification tables, unless you de-select those checkboxes.

When RUN IN READ-ONLY MODE... is checked, GMS will look for possible issues, but will not repair them. This is useful as a diagnostic tool.

3. Click on the **Run** button.
4. When complete, GMS gives you an on-screen report of the number and types of records that were updated.

Check for Program Updates

Concepts

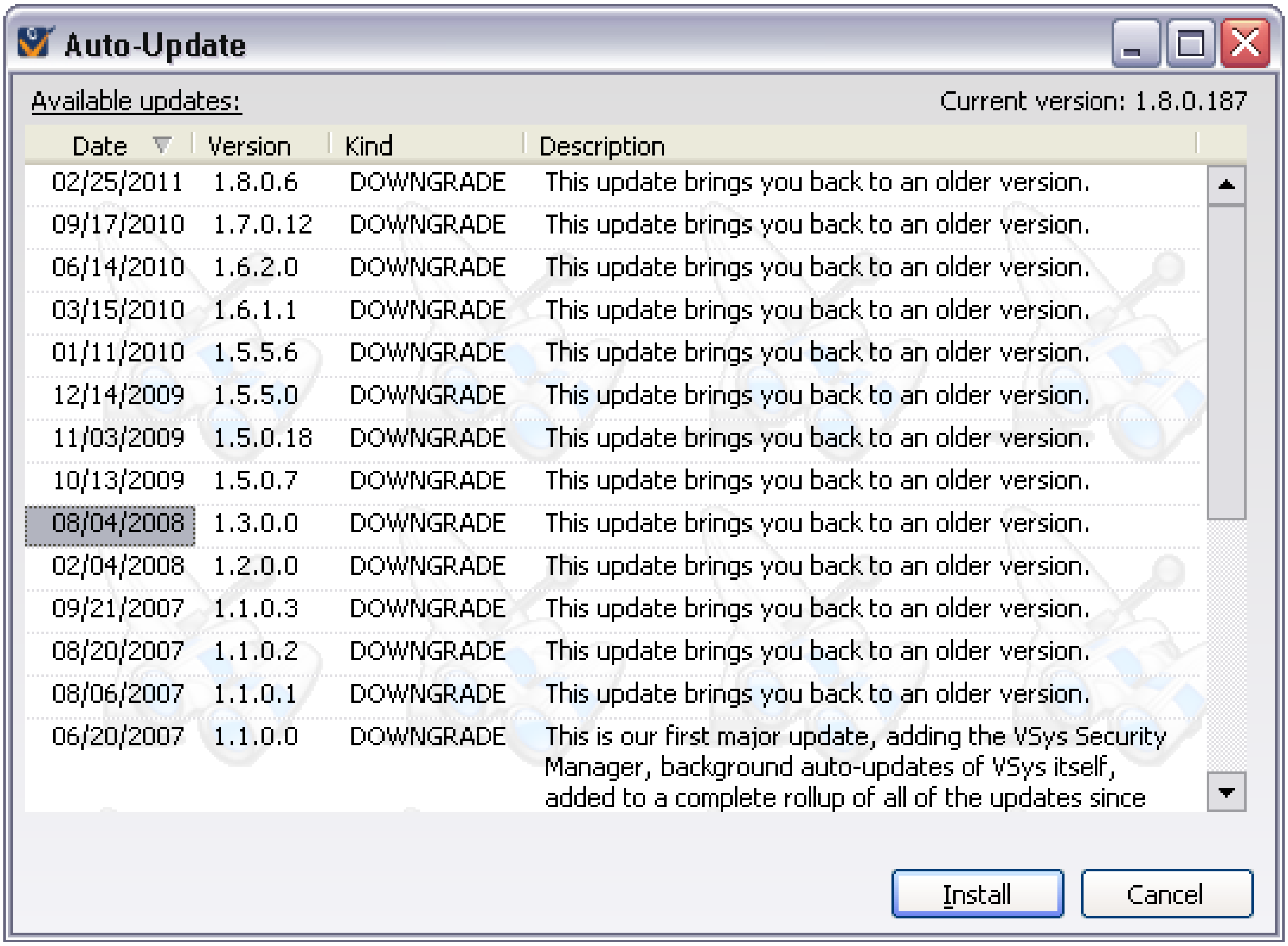
GMS 6 can automatically check for newer released versions of itself using the Internet. This makes the process of keeping GMS up-to-date much easier.

Before You Begin

You must have a live Internet connection for this feature to work. Ensure that no other users are running the same copy of GMS.exe that you are. If multiple machines share the same executable file, all of them must exit.

Steps in This Task

1. On the Administrator tools panel, click on Check for program updates.
2. GMS brings up a list of possible updates, or shows you the message "No updates are available which are more recent than the version you're running now". For each possible update, GMS shows the new version and its description.

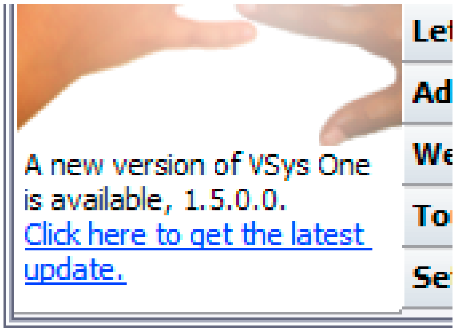


3. To install an update, click on its description then on the **Install** button. Depending on the specifics of the version you're downloading, you may get a confirmation message. Note: the executable needs to be named GMS.exe in order for automatic update to work.
4. GMS will download the update from the Bespoke web site. When it's done, GMS will shut down and try to install the update. If any copies of GMS remain running on your machine, it will wait before installing until all other copies have exited.

For administrators: putting the value `NoAutoUpdate=1` into the `[General]` section of your `GMS.ini` file will prevent the auto-update feature from appearing for your users.

Auto-updates

When started, GMS will check the server for updates automatically without disrupting your workflow. If a new update is available, you'll see a message like this in the lower-left corner of the main GMS 6 screen:



Clicking on the link will load and show the Check for program updates tool above.

Rolling back updates

Some program updates require changes to the database schema, meaning that the database tables which hold your information need to be modified to add tables or columns, change data types or widen columns. GMS will prompt you to make these changes when you start the program. If GMS tries to make the changes and cannot (possibly due to permissions issues on the database), you won't be able to start GMS. If you're unable to elevate the logged-in user's privileges sufficiently to update the database, you can roll back to an older version of GMS using the auto-update tool. From the database selector screen, click on the Check for program updates link under Tools. Download and install the version you were running previously and you will once again be able to get into GMS.

Check for Zip/Postal Code Updates

Concepts

GMS can use zip/postal codes to determine its city, state/province, county and country, as well as know how far it is from other zip/postal codes. Normally GMS does not ship with a populated table of these, but Bespoke provides them for free on its website.

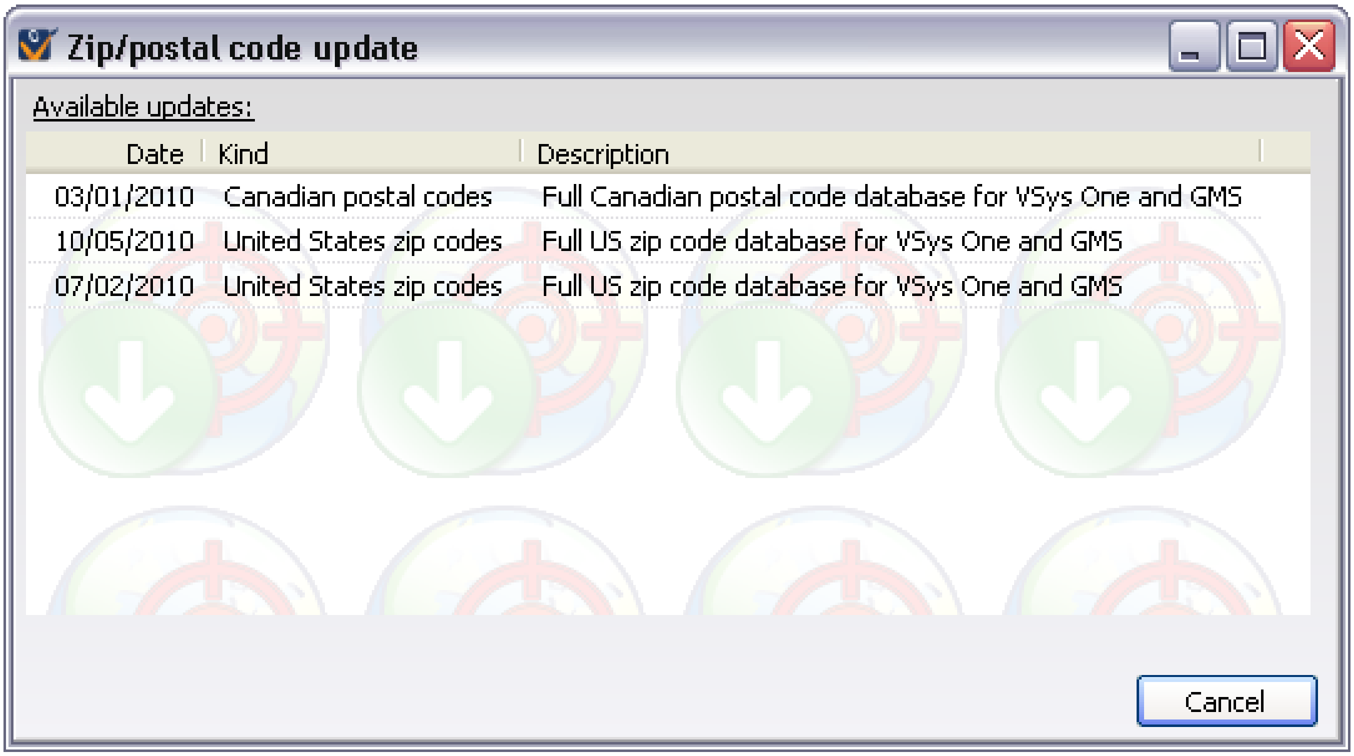
Before You Begin

You must have a live Internet connection for this feature to work.

Steps in This Task

To update your "zips" table, where these values are stored,

1. Click on the Check for zip/postal code updates link on the Administrator tools panel, and GMS will connect to the bespoke.com website to check for updates.



2. Click on any of these updates, then on the **Install** button.
3. GMS will download the complete update, then apply it to your "zips" table.

The Canadian postal codes database is huge - almost 200MB of data - and so non-Canadian users will probably not benefit from downloading and installing this file. The United States file is substantially smaller, so Canadian organizations with cross-border traffic and mailings may benefit from having both tables installed.

Tip: This update can be applied while other users are actively working in GMS.

Concurrent Users Monitor

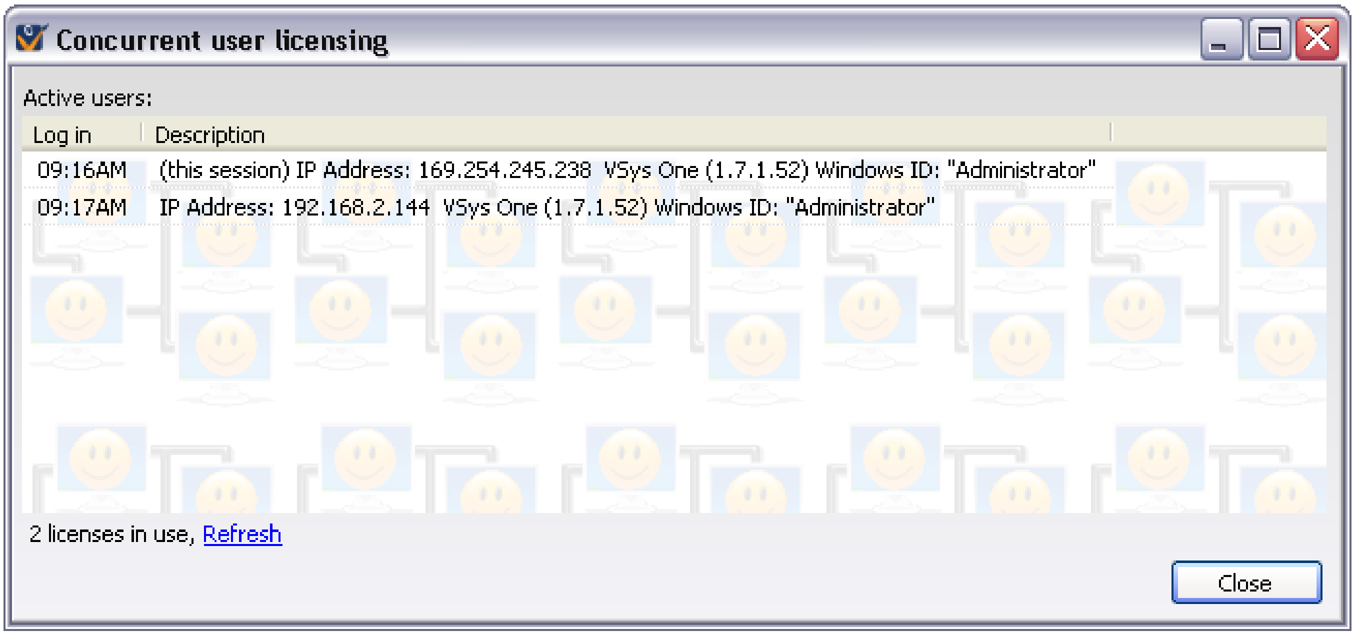
Concepts

GMS provides a dynamic listing of the people currently using the program. This tool is usually very accurate. GMS uses database record locks or semaphores to check the status of each user, so a crashed or disconnected machine's license will be released within a few minutes of the machine's disconnection from the database, even if it was not a controlled shutdown.

When to use this tool

Normally this tool is used to track how many licenses are in use for organizations which have purchased concurrent user licenses, but it's also helpful for finding out who's in GMS when maintenance or updates need to be performed.

To view who is currently logged in go to the Concurrent users monitor/who's logged in link on the Administrator tools panel. Click the Refresh link to update the list.



Only users in the current database using the same serial number are listed here. Mixing and matching, for example, evaluation serial numbers and purchased serial numbers will result in only seeing here the users who are using the same serial number as the logged-in user.

Create and Manage Data Encryption Keys

Concepts

Encryption is a way to encode sensitive data so that only authorized users have access to that information. Encryption keys are used to protect and restrict designated data from unauthorized access. Using encryption keys, you can secure data, even from people who work directly with the data and have access to the database. Data that is encrypted can then only be retrieved using the appropriate decryption keys.

GMS 6 uses a special form of encryption called public key encryption. It allows data to be entered and secured without the user being able to read that data later. the “encryption key” is available to all users but only those with a “decryption key” can read the data. The decryption key is then stored on a physical disk or a USB flash drive, not in the database itself.

Decryption keys, which decode the data, can be created and used by specific individuals, such as administrators, to read the secured data. These keys are protected by the use of a passphrase, and that passphrase can be revoked at any time, even if you cannot get the actual physical key back from the user. So, in the event the key is missing (lost or stolen), the data remains protected.

There are both *master* keys and *user* keys and there are some important differences between the two.

Master Keys	Do not have associated passphrases, and cannot be revoked.
	At least one copy of the master key should be put in a safe or safe deposit box, off site. The data encrypted with the master key cannot be retrieved without at least one copy of this key or a user key derived from it.
User Keys	Unlike the master keys, these keys are protected by passphrases.
	User keys can also be revoked, even if you do not have the physical key.

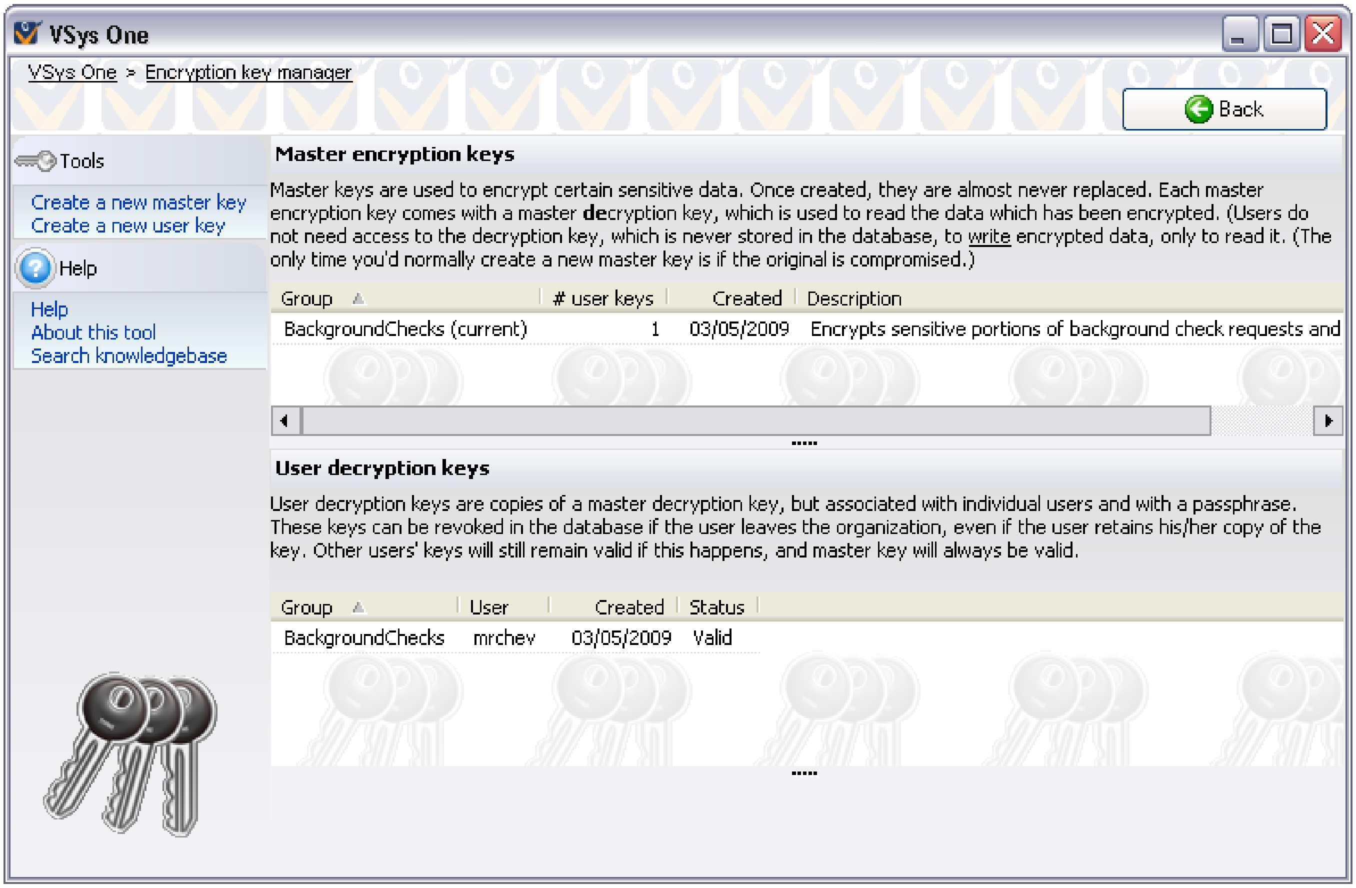
All users should have their own user decryption keys and the master decryption key(s) should always be stored in a safe place, with at least one copy stored off-site.

Caution: In order to protect the data, it is very important to be sure that the decryption keys, especially the master decryption keys, are not stored on your computer's hard drive or on your network.

The Encryption key manager in GMS lets you create and manage master encryption keys and user decryption keys.

Before You Begin

From the GMS 6 main screen, click the Administrator tools bar to open the panel. Click on Encryption key manager.



Creating Master Encryption Keys

You almost never need to make an encryption key more than once. If you already have an encryption key for "Medicals," you don't need to make it again. If you have already made a master encryption key for this type of data, *GMS warns you that a master encryption key already exists. The new key will encrypt all newly saved values , but that all existing values will still use the old encryption key. To read older data, you would need to use the older decryption keys and passphrases.*

1. On the left navigation panel, click the Create a new master key link. The New Master Encryption Key Wizard window opens.
2. Read the information on the window and click **Next** to continue. The Key properties window opens.
3. In the ENCRYPTION GROUP field, select the encryption group from the drop-down list. For example, select Background Checks.

GMS lists the information that will be encrypted to the right of the field and puts the name of the encryption group in the KEY NAME field.

4. Click **Next** to continue. The Save keys page opens.
5. Enter the file names of two places to store the master decryption key.

Caution: They should be on a USB flash drive or other removable media, not on your hard drive or network drive.

Caution: *Be sure that you do not lose the master decryption keys or any data encrypted with that key will be gone forever.*

6. Click the **Next** button. The Finished! page opens.
7. Click the **Finish** button. GMS creates the new key. This may take a few minutes. When you have successfully created a master encryption key, the information for that key will show up on the Encryption key manager screen, under **Master encryption keys**. **You should now create one or more user decryption keys.**

Creating User Decryption Keys

User keys can be given out to users, since they are protected by passphrases and can be individually revoked. However, *no keys should ever be stored on a hard drive or network drive*.

From the **Tools** region of the left navigation panel, click the Create a new user key link. The New User Decryption Key Wizard window opens.
This wizard is similar to the encryption key wizard, but instead creates a user decryption key. *It also requires that an administrative key or a master key has already been created*. When finished, copies of this key are saved to a USB drive and are protected by the user's passphrase.

1. Click the **Next** button. The Key properties page opens.
2. Enter the key properties in the fields on the screen.

Field Names	Definitions and Comments
ENCRYPTION GROUP	Type of data that is encrypted. For example, background checks.
ADMINISTRATIVE	Check to use as an administrative key, which lets you make other keys from it.
USER ID	A short name associated with the user of this key.
PASSPHRASE	This is the password which the user will need to enter every time he accesses this key.
CONFIRM PASSPHRASE	Enter the same password as above.

User IDs in the Encryption key manager are not necessarily related to user IDs in GMS security. GMS security and GMS data encryption work well together, but neither requires the other and user IDs in one don't have to be the same in the other.

3. Click the **Next** button. The Save keys page opens.
4. Enter the file names of one or two places to save the user's decryption key.

Caution: They should be on a USB flash drive or other removable media, never on your hard drive or a network drive.

5. Click the **Next** button. The Finished! page opens.
6. Click the **Finish** button. GMS creates the new key. This may take a few minutes.

Revoking a User's Key

To revoke a user's decryption key from the Encryption key manager screen, right-click on the key from the list and select Revoke. A Confirm window opens alerting you to the fact that the decryption key cannot be re-enabled and the user will not be able to access any encrypted data unless a new key is generated.

Changing a User Decryption Key Passphrase

Changing a user decryption key passphrase requires both the physical data file and the user's current passphrase. (If neither is available, create a new decryption key from scratch.)

1. Right-click on a user decryption key and select Change passphrase.
2. When prompted, select the file with the user's key, and enter the current passphrase.
3. Enter the new passphrase twice (for verification).
4. Click the **OK** button. Then, choose the file in which to save the modified key.

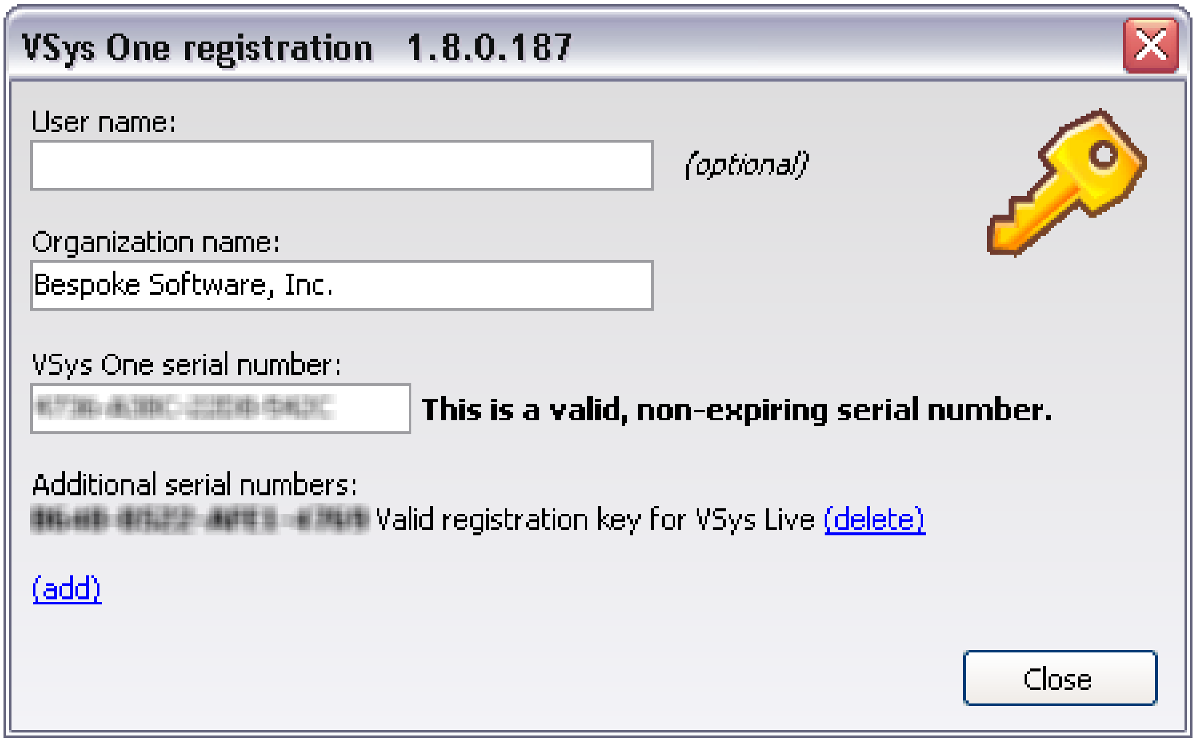
Note: if the user has more than one key, either each one must be updated individually, or the file containing the key can be copied to the second location.

Caution: *If a user's key or passphrase has been compromised, do not just change the user's passphrase. Since the key itself can be copied, and the passphrase is associated only with the copy of the key, the compromised key can be used to access data. Instead, revoke the user's key and create a new one. This will make the old key and all of its copies useless, regardless of how many times it's been copied.*

Enter GMS 6 Registration Codes

Concepts

All organizations which use GMS 6 are given an organization-specific serial number, which is paired with their organization name. GMS won't start without that company name/serial number combination, or if either value is incorrect.



Some serial numbers - for demonstration versions or for those whose account is not yet paid up - have built-in expiration dates. After the expiration date, GMS will no longer start until a new registration code is entered.

Steps in this task

Enter a code by selecting the Enter GMS 6 registration codes link from the Administrator tools panel. You must use the Organization's name as indicated in your contract for the serial numbers to match. As appropriate, use the (add) hyperlink to enter additional registration codes to enable add-on products like GMS Live.

Make a Local Backup of GMS 6 in Another Folder

Concepts

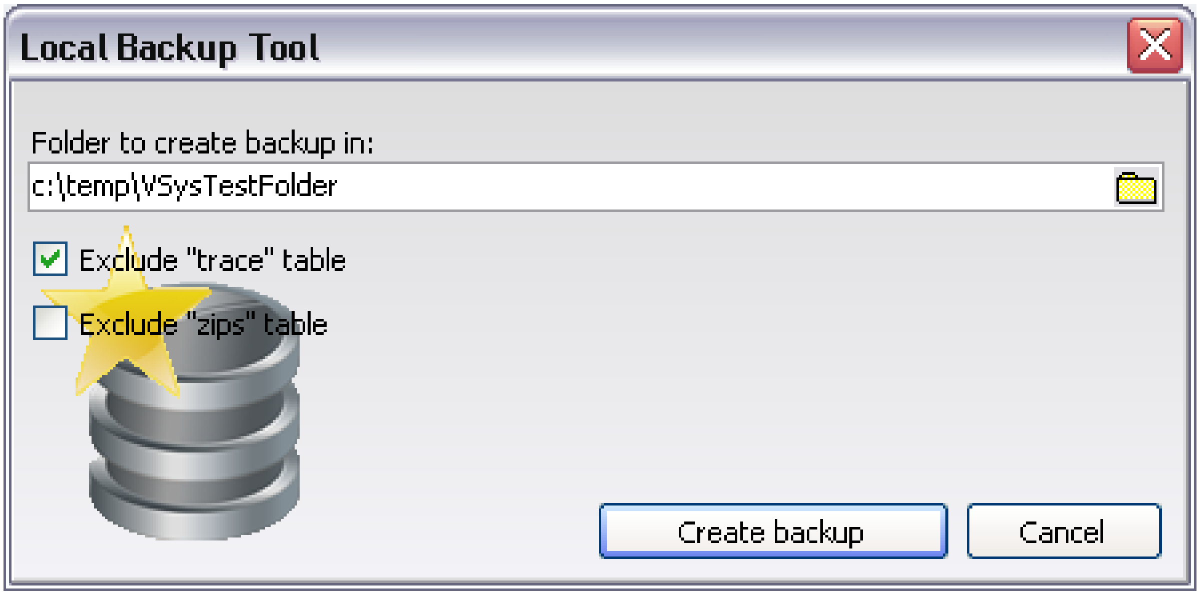
Generally GMS backups are static things - a file for recovery of your database if it becomes damaged, the server fails, or other problems. This tool backs up your current data to a folder that you designate, copies GMS 6 and its configuration file into that folder, and places a shortcut on your desktop so that you can work with a copy of your main database in a safe place.

When to use this tool

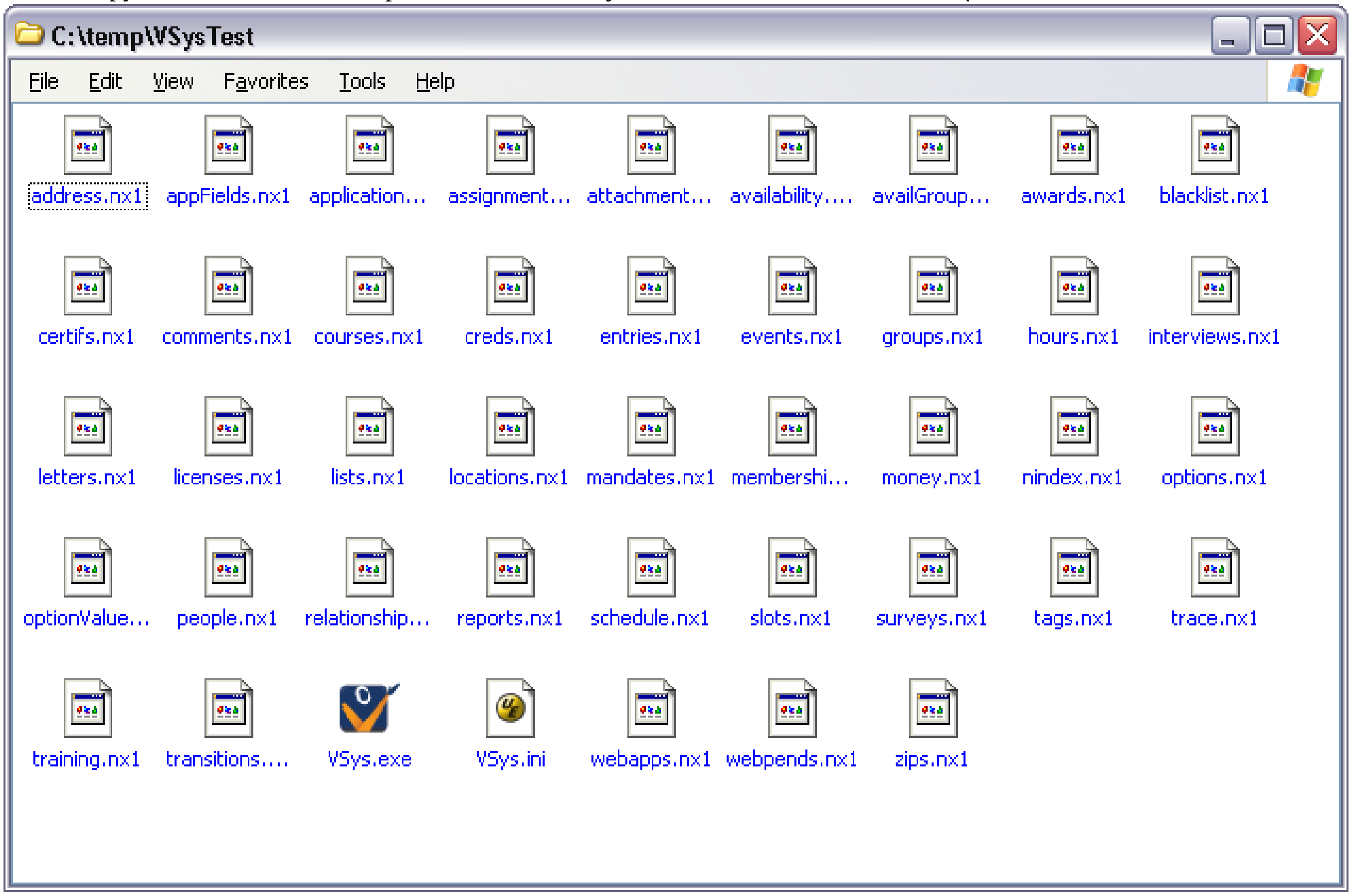
- Training purposes
- Evaluating a new version of GMS 6 without affecting your production database
- Testing a potentially dangerous process, e.g. the *Bulk Entrant Value Updater* (page 153), without endangering your data

Steps in This Task

1. From the GMS 6 main screen, click the Administrator tools bar to open the panel, then click on Make a local backup of GMS 6 in another folder.



2. Select a folder to use for this purpose. It can be on your local hard drive, or even on a USB flash drive, though it will be slower on a flash drive.
3. Optionally choose to omit the "`trace`" and/or "`zips`" table. In many cases the "`trace`" table is both large and not helpful for testing and training. The "`zips`" table is generally small in the US, but very large if it includes the Canadian postal codes.
4. Click **Create backup**.
   GMS will now back up all of your data to the selected folder - this may take some time. When it's complete, you can now run the copy of `GMS.exe` which is present in the folder you chose, in this case, "`c:\temp\GMSTestFolder`".



5. Double-click on the new GMS icon on your desktop, and you are now running GMS in NexusDB standalone mode, disconnected from your main database. When you are done testing or evaluating, you can simply delete this entire folder.

You can tell you are in this backup data because there will be a yellow bar at the top saying "Testing data".

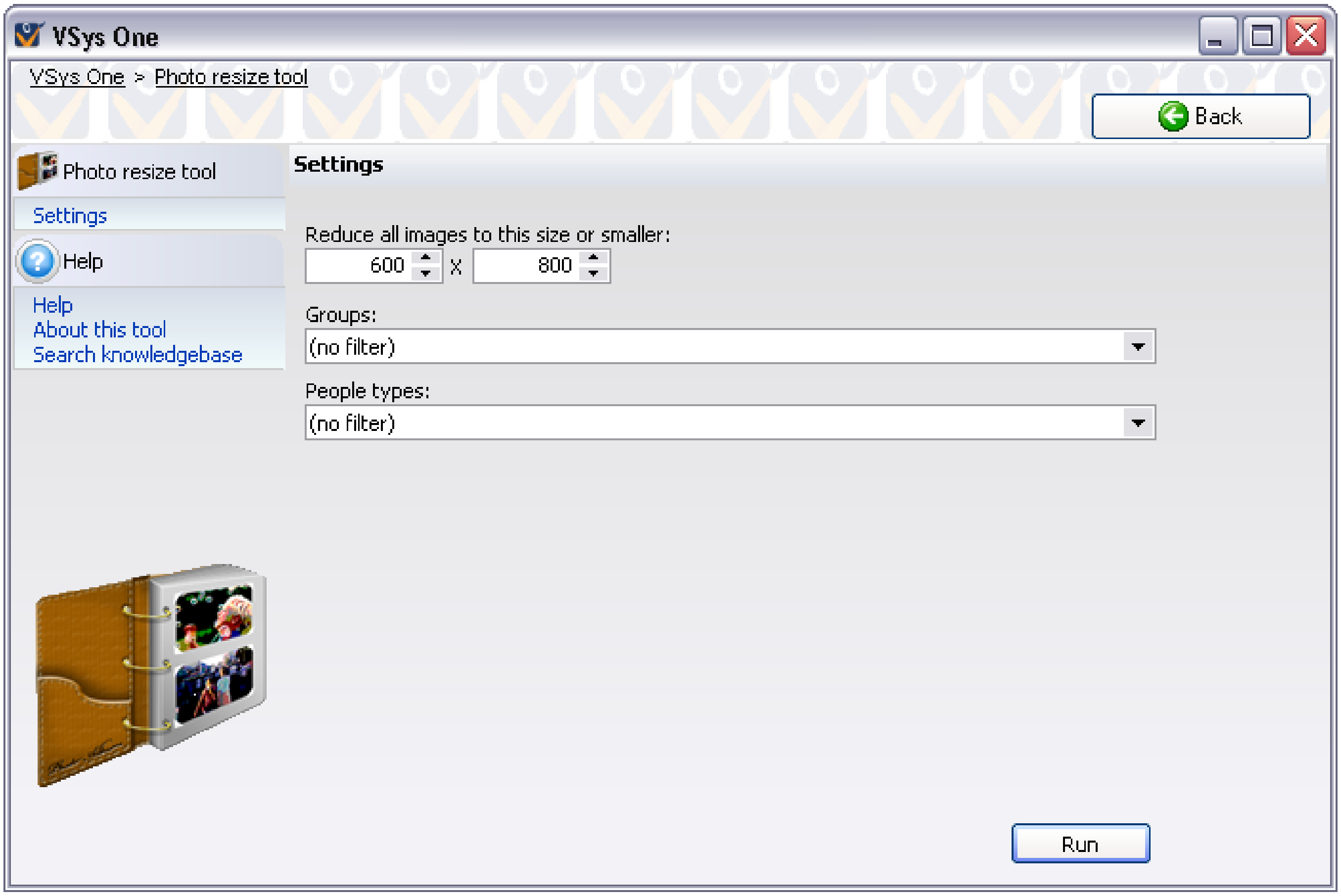
Photo Resize Tool

Concepts

If Individual photos are scanned in at very high resolution, or they are brought in from a digital camera without first being reduced to a reasonable size, they can both take up a lot of disk space and slow GMS down. Use the Photo resize tool to reduce large photos to a more reasonable size while leaving others unchanged.

Steps in This Task

1. From the GMS 6 main screen, click Photo resize tool on the Administrator tools panel.



2. Select a maximum image size. Any image which is larger in either or both dimensions (horizontal or vertical) than the values entered here will be reduced in size. The default value is 600 x 800, which is our recommendation.
3. If you want to check and fix images for people in specific groups or of specific types, specify the groups and/or people types.
4. Click the **Run** button.
   The resizing process may take some time.
   When complete, GMS gives you an on-screen report showing the names of the people whose images it needed to update.

Purge Old Trace Records

Concepts

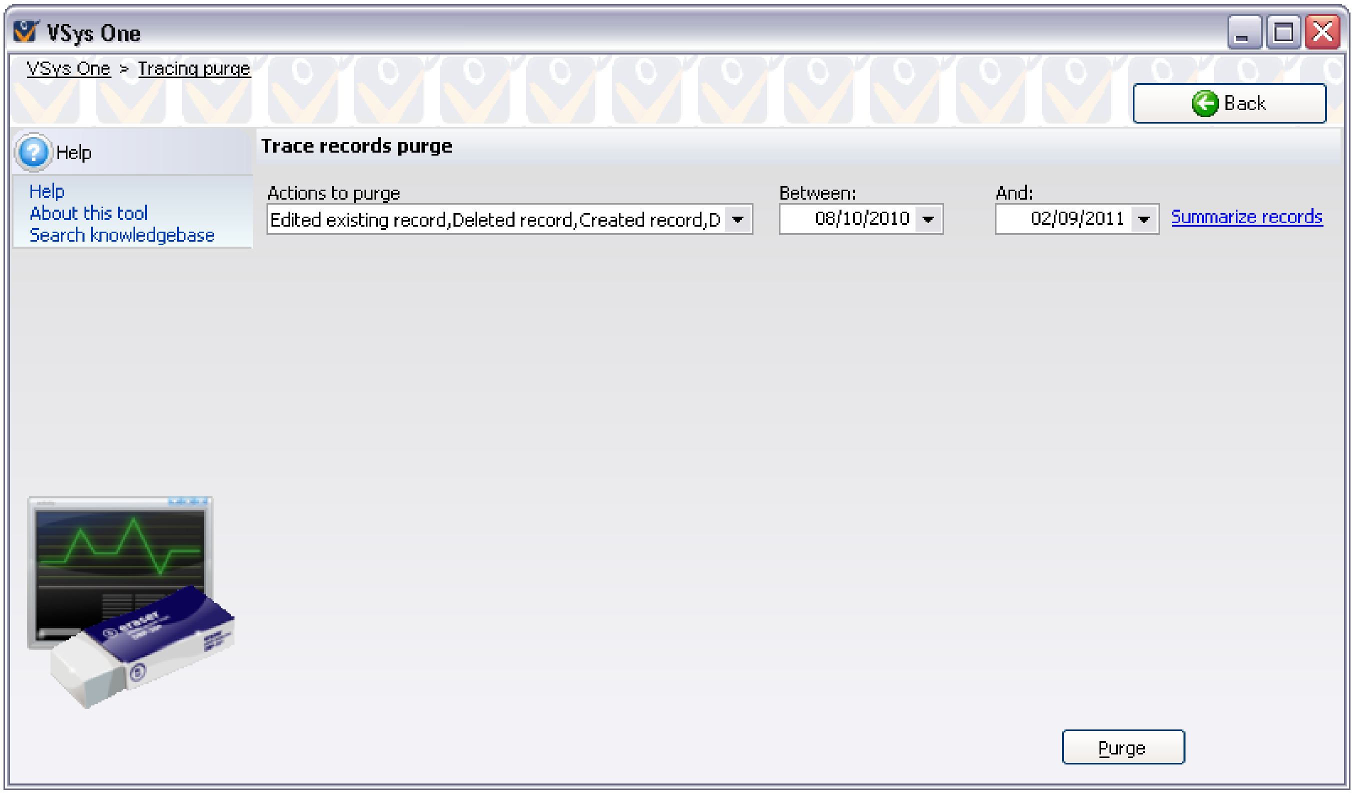
This tool allows administrators to permanently remove old "trace" records, which are audit logs of most activities in GMS. These logs include logging in, viewing records, creating values, printing reports, sending letters, and security exceptions. If tracing is enabled, these and many other actions leave a trail indicating what actions were performed and who performed them. This table can get large. Use this tool to purge old records from the table, or simply summarize existing records.

When to Use

If the trace table becomes excessively large, or records appear in tracing which are simply not relevant, purge out old trace records or just those which you don't care to retain.

Steps in This Task

1. From the GMS 6 main screen, click on Purge old trace records from the Administrator tools panel.



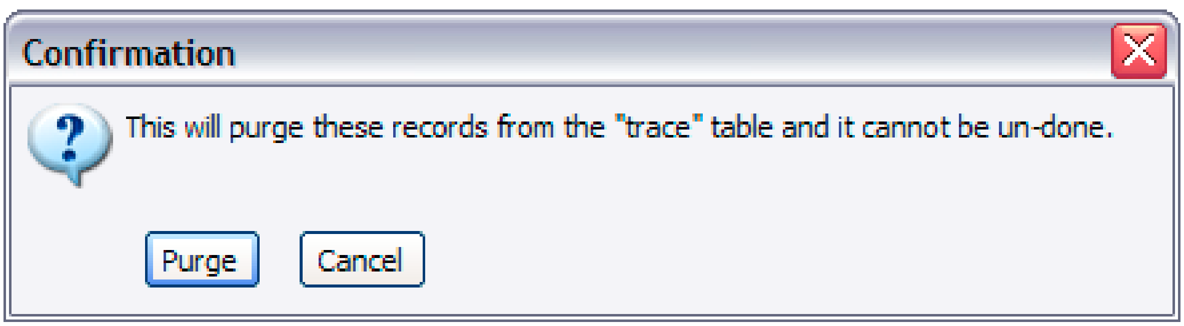
2. Select the actions to be purged or summarized, and the date range. Only records of these types and between these dates (inclusive) will be summarized or deleted.
3. Click on the Summarize records link. GMS will count the records that meet the actions and date criteria.

Record counts

	Deleted record	Edited existing record	Unknown action	Kiosk login failure	E-mail Robot heartbeat	Created record
08/12/2010	0	0	0	0	0	0
08/13/2010	0	0	0	0	0	0
08/16/2010	0	0	0	0	0	0
10/14/2010	0	0	0	0	0	0
10/15/2010	0	0	0	0	0	1
01/19/2011	1	4375	0	0	0	242
01/20/2011	739	120	0	0	0	167
01/21/2011	0	488	0	0	0	81
01/24/2011	454	143	0	0	0	1167
01/26/2011	0	0	0	0	0	0
01/27/2011	0	5	0	0	0	0
01/31/2011	4	2	0	0	0	4
02/01/2011	3	0	0	0	0	0
Total	1201	5133	0	0	0	1662

This operation may take some time, depending on the number of records and the speed of your database server.

4. Check the counts of records.
5. If these counts look right, and you want the records deleted, click the **Purge** button to delete them. A confirmation window opens warning you that this action will purge the records from the trace table and that it cannot be reversed. Once started, this operation cannot be cancelled.



Caution: We recommend that you back up your database before this operation is performed. See *Backup the Database* (page 177) for details on backing up your GMS data.

Tip: To prevent even GMS 6 administrators from purging these records, revoke UPDATE and DELETE rights for the "trace" table for users. This table and the "zips" table are the only tables for which these rights can be revoked without GMS having serious problems. When GMS goes to purge records trace records without the appropriate rights on the database, GMS will throw an issue report.

Rebuild Lookup Indices

Concepts

Periodically, internal database indices get out of date and need to be rebuilt. Use the index rebuilder tool to rebuild various lookup indices within the database. This tool can also be run ***from the command line*** (page 278).

The Rebuild Lookup Indices tool should be run in full every three days to ensure that your lookup indices and other values are up-to-date.

When to Use

Be sure to run the index rebuild tool in the following instances:

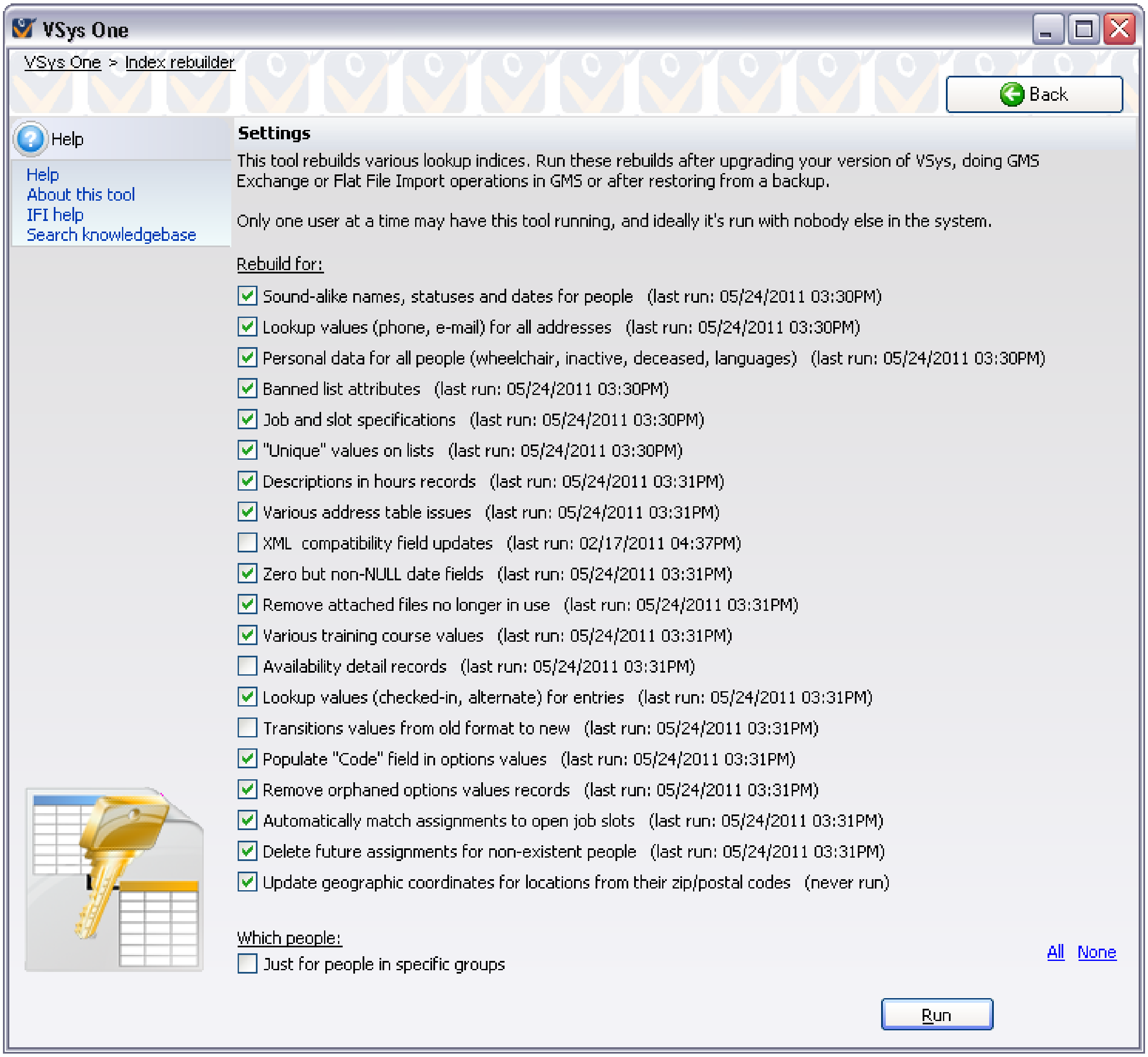
- after ***upgrading your version*** (page 256) of GMS
- after running the ***Interactive File Importer (IFI)*** (page 160) in GMS
- after GMS Exchange, GMS Transfer or Flat File Import operations in GMS
- after ***restoring data from a backup*** (page 195)
- after any changes to the ***name lookup rules*** (page 227)

Before You Begin

All users except the one running this tool should exit GMS before rebuilding the lookup indices.

Steps in This Task

1. From the GMS 6 main screen, click Rebuild various lookup indices on the Administrator tools panel.



2. All of the check boxes (under REBUILD FOR:) listing the types of data are checked. If there are any that you do not want to rebuild, click on their check boxes to de-select them.
3. If you want to rebuild the indices for specific people/groups, click on the check box, JUST FOR PEOPLE IN SPECIFIC GROUPS. Then, specify the groups you want to run it for.
4. Click the **Run** button.

The rebuild may take some time depending on how many records of various types are in the database.

When complete, GMS gives you an on-screen report showing the number and types of records it needed to update.

Restore From a Backup

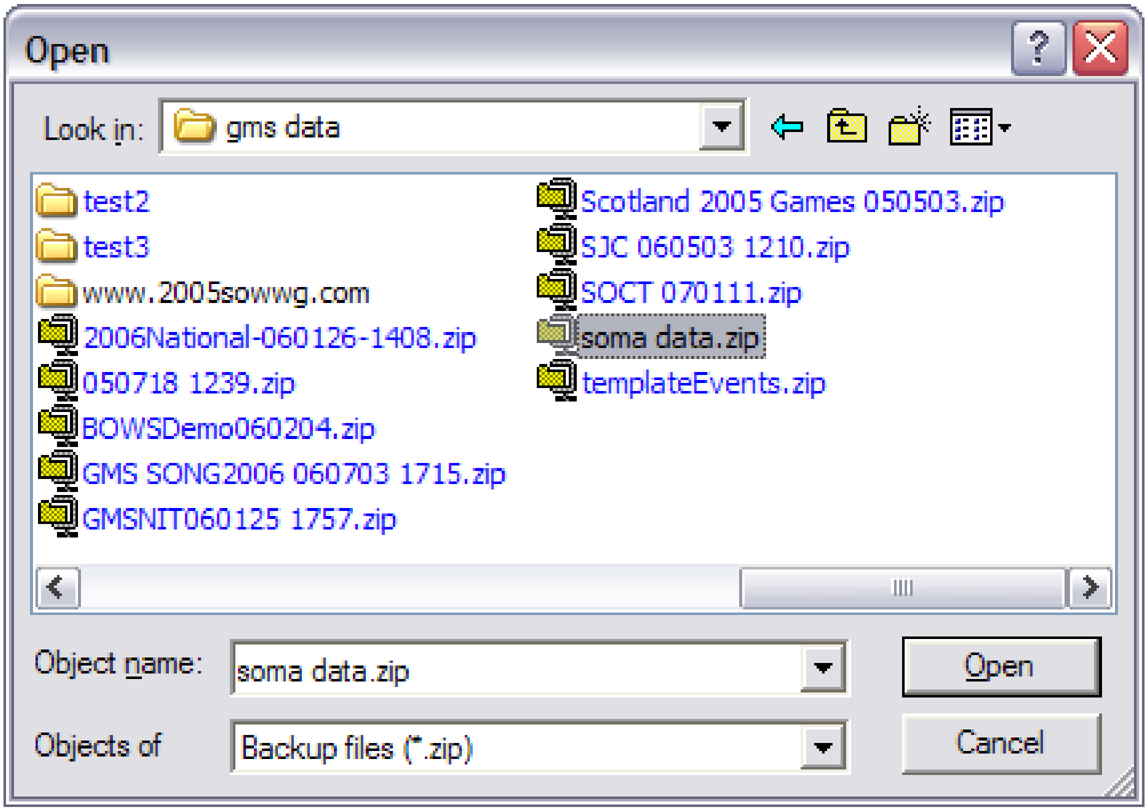
Concepts

This tool lets you restore GMS data to a previously backed-up version. It overwrites your existing data with that from a backup. *All existing data in your system will be overwritten*.

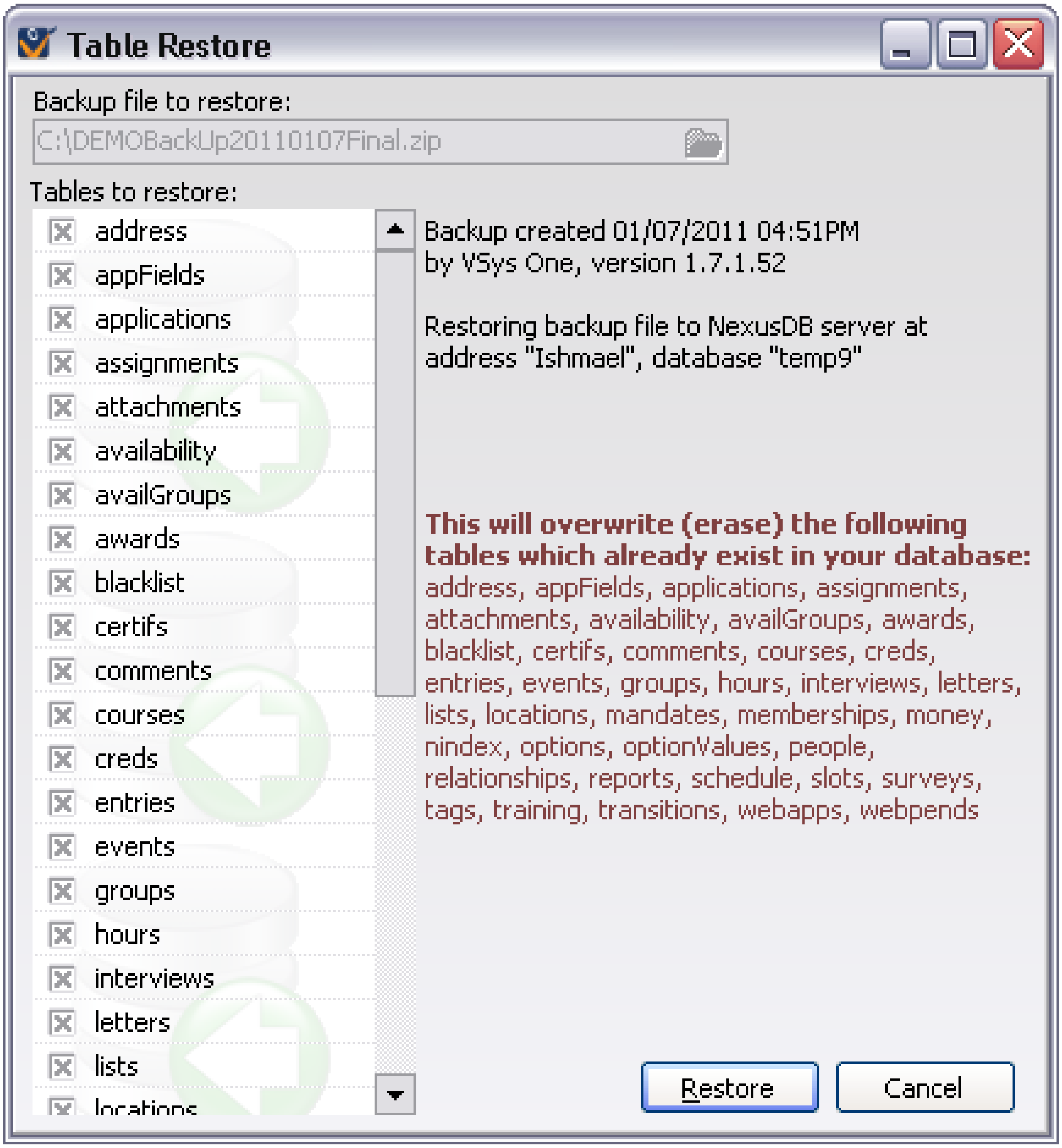
You can only restore backup files made by GMS 6, not backups made by GMS. Backups made by GMS, if they include all tables, will also include all GMS data, if present.

Steps in This Task

1. *All users must exit GMS 6.*
2. From the GMS 6 main screen, click the Administrator tools bar to open the panel, then click on Restore from a backup.
3. Or, immediately after double clicking on the GMS 6 icon, press and hold the left **Ctrl** key on your keyboard until the GMS 6 Database selector window appears. Select the appropriate database, click on the Tools link, then select Restore from a backup to this database.



4. Browse to the backup file that you want to restore.
5. Click the **Open** button. The Table restore screen opens.



The backup file you selected shows in the BACKUP FILE TO RESTORE field. **Check to be sure this is the correct file.**

GMS shows the current database you are connected to at the bottom of the screen. Any notes about the backup will show on the right-hand side of the screen.

All of the tables are checked when you access this screen.

6. If there are any tables you do *not* want to restore, click on the check box to de-select them.
7. Click on the **Restore** button to start the restore process.

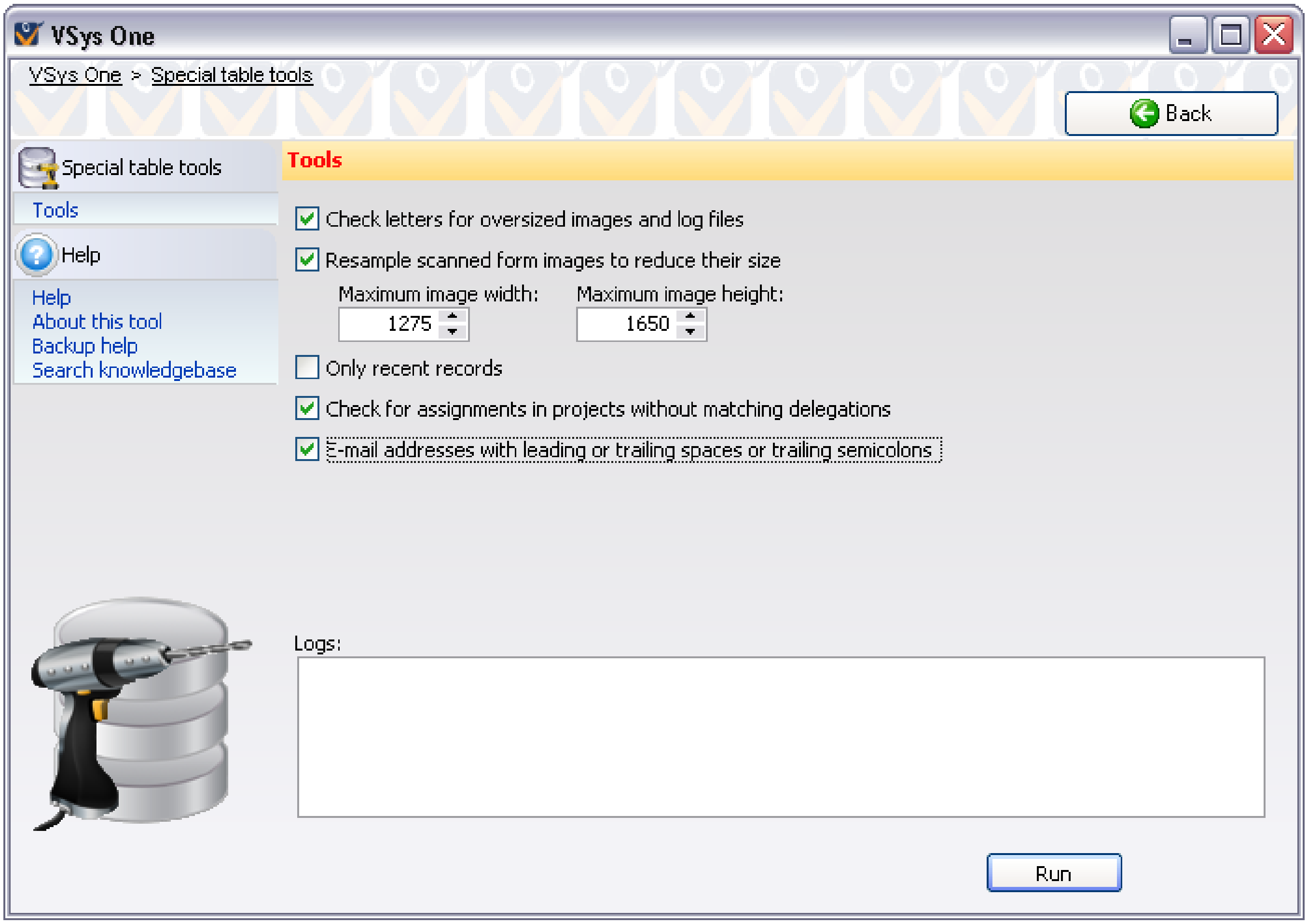
After the restore process is complete, GMS will need to restart if you started it from the Administrative Tools panel.

Special Table Tools

Concepts

These are special-purpose tools for manipulating specific tables.

Caution: Before running any of these tools, please have a current backup and no other users in the database.



Checking ONLY RECENT RECORDS and entering a date there will run the tool only on the first two options if created or updated on or after that date.

After running any of these tools, if you're using a NexusDB database and GMS reports many updated records or a large amount of space freed, you should also run the ***NexusDB table repair tool*** (page 268) to reclaim the disk space that was saved.

Check letters for oversized images and log files

This tool checks all letters in the database (optionally only those after a specific date) for large log files or large images that were not removed and compressed using image reduction. Oversized logs will usually only happen due to problems dealing with e-mail addresses. Any letters with these types of issues will be automatically corrected and logged.

Resample Scanned Form Images to Reduce their Size

Very large scanned images take up a lot of space in the "comments" table. This tool goes through all scanned images attached to comments, certifications and background checks, looking for images which are larger than the size you specify. Run it specifying the maximum width and height for scanned images and GMS will go through all images which are too large and resize them.

This is not a fast process and may take a while to process, especially if you're on a slow network connection or the drive holding the data is slow.

Check for assignments in Games without matching delegations

If a person registered within a Games is given assignments, and moved from one delegation to another, it's possible for their assignments to not follow, and still be associated with their previous delegation. Should this happen, GMS will still usually report those assignments, but you won't be able to edit them from within that person's Profile Editor.

Running this tool scans all assignments within Games:

1. If the assignment is associated with someone in that Games who is in the same delegation as the assignment is, no change will be made.
2. Otherwise, if the person is in the Games, GMS will move the assignment to the person's current delegation.
3. If the person is not in the Games at all, the record will be reported in the processing log for manual verification.

E-mail addresses with leading or trailing spaces or semicolons

E-mail addresses associated with people may have leading or trailing space characters in them, which can cause problems when they're used with the E-mail Robot. In some other cases, imported e-mail addresses from other programs can have semicolons at the end of the e-mail address, usually entered to make copying and pasting them into Outlook easier. For both of these cases, the E-MAIL ADDRESSES WITH LEADING OR TRAILING SPACES OR SEMICOLONS TOOL will find e-mail addresses like this and automatically correct them, removing any leading spaces plus any trailing semicolons or spaces.

Setup

System Preferences

Concepts

System preferences are various settings which affect how you use GMS 6. Some of these settings are global, meaning they affect all users and are stored in the database. Others are local, meaning they only affect the people using the same `GMS.ini` file.

Display

Various user interface settings.

Setting	Description
DISPLAY STYLE	Changes the color scheme that GMS 6 uses.
BACKGROUND IMAGE FADE	On many lists, GMS displays a background image which helps you know where you are. This value edits how transparent that image is - 100 means it's invisible, 0 means it's visible and very colorful!
LOGO	Adds a logo or an image of your choice to the lower left corner of your GMS screen.

Defaults

These values affect newly-created people, groups and addresses. All of these are global settings, meaning that they affect all users in GMS 6.

STATE/PROVINCE	Assigned to newly-created addresses.
COUNTRY	Assigned to newly-created addresses.
LANGUAGE	Assigned to newly-created people and groups.
DEFAULT GROUP FOR NEWLY-CREATED PEOPLE	Assigned to newly-created people.
HOURLY VALUE FOR JOBS WHICH HAVE NO VALUE ASSIGNED	For newly-created jobs and those without assigned hourly values, this is the monetary value will be used for each credited Individual hour.
DEFAULT TYPE FOR NEWLY-CREATED PEOPLE	Assigned to newly-created people.
DEFAULT STATUS FOR NEWLY-CREATED PEOPLE	Assigned to newly-created people.

International

Various formatting and units settings.

DATE FORMAT	All dates that GMS 6displays will use this format. When importing, GMS will expect dates to be formatted like this.
TIME FORMAT	All times that GMS 6 displays will use this format.
DURATION FORMAT	How time durations, for example assignment lengths, are displayed. "hours:minutes

(12:45)" or "Fractional hours (12.75)".

PHONE FORMAT	Newly-entered phone numbers, if they have the required number of digits, will be formatted in this style. Those with too many or too few digits will not be changed, and existing phone numbers are not affected.
HOURS DISTANCE UNITS	The unit of measure for distance associated with hours records. Note: this only affects the display of the name of the field: "Miles" or "Kilometers". Changing this does not change any existing, saved data.
EDIT/PRINT UNITS	When editing letter templates and printing documents, GMS will show margins, tabs, etc. in these units.
USE A4-SIZED PAPER	All reports which don't otherwise specify a paper size will use A4-sized paper if this is checked. Otherwise, US "Letter" format will be used.

Feature enabling

Enables/disables parts of GMS. When a feature is disabled, its options and tools will be hidden in most parts of GMS. No data is lost when a feature is disabled, but it is suppressed to simplify how GMS looks.

ENABLE TRACING	Tracing is used to view when changes were made to various objects, especially people. It's also used for seeing when someone was last viewed or edited, and it must be enabled for the Recently viewed people link to be enabled in the person lookup tool. Tracing does take up a substantial amount of space: if it's turned on, you should clear out old trace records every few months using the Purge old trace records (page 191) tool.
ENABLE TRAINING	Training helps you track what classes your Individuals have taken.
ENABLE MEMBERSHIPS	Memberships are used for all manner of things including clubs.
ENABLE BACKGROUND CHECK PROCESSING	Background checks are used to verify the identity of your Individuals and that they don't have pasts which are incompatible with your organization.
ENABLE TOUCHSCREEN/KIOSK MODE	Kiosk mode is the touchscreen interface and optional barcode/magnetic stripe scanners.
ENABLE GAMES	Games are used for compartmentalizing special events from the rest of your assignments.
ENABLE JOB ASSOCIATIONS	Job associations connect people to jobs as active, substitute, etc. without using specific assignments.
ENABLE ACCOUNTS	Accounts are used for tracking transactional data like donations, meals delivered, etc.
ENABLE SMS/TEXT MESSAGING	Enables the built-in text messaging system.

Entrant images

When new portrait photos are imported for people, these rules will be applied. Existing photos are not affected. All of these are global settings, meaning that they affect all users in GMS 6.

PREFERRED IMAGE WIDTH	The value that GMS will present as the preferred width for new photos. 600 is the recommended value.
PREFERRED IMAGE HEIGHT	The value that GMS will present as the preferred height for new photos. 800 is the recommended value.
MAXIMUM IMAGE WIDTH	The value that GMS will present as the maximum width for new photos. 768 is the

	recommended value.
MAXIMUM IMAGE HEIGHT	The value that GMS will present as the maximum height for new photos. 1024 is the recommended value.
JPEG IMAGE QUALITY	When saving new photos internally, GMS uses the JPEG format. This is a "lossy" format which saves a lot of space, but does degrade the image slightly. Higher numbers represent a higher quality, lower numbers a lower quality. GMS only allows values between 60 and 95, inclusive.

Scanned images

Scanned images are those attached to comments and within certifications. If a new image is added via disk file, camera or scanner, and its size is larger than either dimension here, GMS will prompt you to optionally reduce its size.

PREFERRED IMAGE WIDTH, HEIGHT	The values that GMS will present as the preferred width and height for new scanned images. 850 is the recommended value for width, 1100 for height.
JPEG IMAGE QUALITY	GMS stores images in JPEG format, which is a lossy format, meaning that the image is reduced in quality slightly to tremendously reduce its stored size. A higher value here will store the image at a higher quality, with a consequent increase in its size on disk. The recommended value is 60, but you should scan, save, and then print some sample scanned forms to ensure that the reproduction quality is high enough that they are still legible.

Person lookup

DEFAULT PERSON LOOKUP METHOD	When opening the person lookup tool, by default, show it with this lookup method selected: "Personal information", "See everyone in system", "See everyone in groups", "Address, phone, e-mail", "People on lists", "Distance from a postal code" or "Touchscreen/kiosk info".
WHEN LOOKING UP PEOPLE...	If GMS security is enabled, and the current user does not have "view" or "edit" rights to a person, in the person lookup tool, don't show any fields other than the ones selected here.
FIELDS TO SHOW IN THE PERSON LOOKUP TOOL	When opening the person lookup tool, if the user hasn't changed the list of columns to show, then show these.

Statuses

MARK INACTIVE PEOPLE AS ACTIVE...	When posting Individual hours, if the Individual is currently marked as any of the eligible statuses selected, GMS will change them to Active if the hours are not more than the given distance in the past.
DON'T SHOW A WARNING MESSAGE...	When giving someone an assignment, if they don't have availability specified for that date, should GMS complain? (This option does not affect GMS warning you if the Individual is specifically marked as "not available".)
INDIVIDUAL AVAILABILITY IS LOCATION-INDEPENDENT	If checked, GMS won't prompt for locations when creating availability records, and when checking if someone is available, the location of the job is not relevant.
NEXT TIME THE INDEX REBUILDER IS RUN FOR AVAILABILITY...	Forces GMS to completely rebuild the availability detail records. If you've changed the RETAIN AVAILABILITY, WHEN A "FINISH DATE IS LEFT BLANK" or INDIVIDUAL AVAILABILITY IS LOCATION-INDEPENDENT boxes above, check this. The rebuild operation, using the standard index rebuild tools, will be time-consuming, but will ensure that all lookup records are stored correctly, old records are removed, and future lookup records are created when applicable.

Advanced

Options:

DON'T USE SPORTS	Check this if sports are not relevant to your organization, GMS will remove all references to them.

HIDE NATIONALITY, PLACE OF BIRTH AND PASSPORT FIELDS	Suppresses these fields in the profile editor.
HIDE ADDITIONAL TYPES FOR PEOPLE	In the profile editor, prevents a person from getting types other than their primary types.
HIDE ADDITIONAL GROUPS FOR PEOPLE	In the profile editor, hides the fields for giving a person more than his primary group.
DON'T INCLUDE A "COMMENTS" AREA FOR WHY PEOPLE ARE BANNED	Use this to prevent your staff from entering comments or reasons about a Individual's banning beyond selecting from the list of banned reasons you've provided.
WHEN CREATING A NEW PERSON, DON'T CHECK TO SEE IF HE/SHE ALREADY EXISTS	Used when creating new people. Not recommended unless you're manually entering a new database from scratch.
MAKE ALL ITALIC TEXT IN REPORTS INTO NON-ITALIC	If checked, all reports which contain text formatted in italics will have that text changed to non-italics when printing.
KEEP SPLASH (STARTUP) SCREEN LONG ENOUGH TO BE READ	As GMS 6 starts up, it shows its progress on the splash screen. When done, it closes that screen unless you check this box, which keeps the screen up long enough for you to read its quotes. (Local setting - only affects those using the same `GMS.ini` file.)
PREVENT [BACK] BUTTON FROM BECOMING [CLOSE]	Normally when you hit the **Back** button and return to the GMS 6 main screen, **Back** becomes **Close**, and you can click that to exit the program. Checking this box makes the **Back** button disappear, and you need to click the **X** button in the upper-right to close GMS.
SHOW A CONFIRMATION PROMPT WHEN CLOSING	If checked, when you exit GMS, GMS will prompt you to ensure that you're exiting intentionally.
DON'T SHOW COOL QUOTES ON THE SPLASH/ABOUT SCREEN	On the startup and About screens, GMS 6 shows quotes and sayings that the developers found interesting. Check this to make them not appear. (Local setting - only affects those using the same `GMS.ini` file.)
OPEN AND CLOSE PANELS INSTANTLY INSTEAD OF GRADUALLY	The various panels in GMS, including the one this option is on (Advanced), GMS normally opens them gradually over a period of about 1/2 second. Checking this box will cause them to "pop" open instantly or "slam" closed without any delays. This may be useful when using Terminal Services or Citrix over a slower connection.
DON'T SHOW HINT BALLOONS	This prevents all of the yellow hints from popping up automatically on any GMS screen. Note: this setting affects all users.
REDISPLAY SUPPRESSED HINTS	On many screens, GMS shows yellow hint windows in the lower right corner, and gives you the option to hide them forever. Checking this box will bring all of them back to life. (Local setting - only affects those using the same `GMS.ini` file.)
SHOW DATABASE STATUS BAR AND DEBUGGING INFO AT BOTTOM OF SCREEN	Shows some text on screen which indicates which database you're using, resource allocation, and some other debugging information. This is useful if you commonly connect to multiple databases - GMS will show you which database each window is associated with. (Local setting - only affects those using the same `GMS.ini` file.)
ALLOW SINGLE-CHARACTER FAMILY NAMES FOR PEOPLE	By default, GMS considers a family/last name with only one character to be incomplete, if this is checked, a single-character name will be allowed.
DISABLE THE POPUP HINTS IN THE PERSON LOOKUP TOOL	Hides these yellow hover-over hint windows in the various person lookup tools.
IN THE PROFILE EDITOR, SHOW PAST GAMES	Show the "Past Games" tab for people registered in one or more Games.
SEND EXCEPTIONS REPORTS VIA THE WEB INSTEAD OF E-MAIL	Uses the web-based submission tool for exceptions reports instead of trying to send them by e-mail. This option is most helpful in environments where no e-mail client is installed.

SHARED ADDRESSES DON'T SHARE PHONE NUMBERS OR E-MAILS.	Checking this means that while addresses are shared, phone numbers and e-mails are not. Use this for spouses who share an address but have unique e-mail addresses or cell phone numbers.
DISABLE RIGHT-CLICK REPORTS ON LISTS ON PEOPLE.	This will turn off the option of getting to reports by right-clicking on a person.
DISABLE RIGHT-CLICK CREDENTIALS ON LISTS ON PEOPLE.	This will turn off the option of printing credentials by right-clicking on a person.
DISABLE RIGHT-CLICK ADD/REMOVE TO/FROM LISTS ON LISTS OF PEOPLE.	This will turn off the option of adding people to or removing people from lists by right-clicking on a person.

Other items

THESE TYPES OF RELATIONSHIPS AREN'T RELEVANT	Checking relationship types here suppresses them from relationship editors and filter. Check the ones that aren't relevant to your organization.
SUPPRESS THESE TYPES OF QUOTES	If "cool quotes" are being displayed, suppresses quotes of these types.
WHEN PRINTING LABELS, USE THIS ORDER	Defines how GMS will print labels: "Rows first: left to right across, then down" or "Columns first: top to bottom, then across".
HIDE THESE BUILT-IN REPORTS	When right-clicking on a person you can run many of the built-in reports, check any reports here to hide them, usually in favor of having your staff use the ones you've defined.

Address

This represents the address of your organization. Values entered here are available in custom reports and in mail merges as well.

Archived Reasons

Concepts

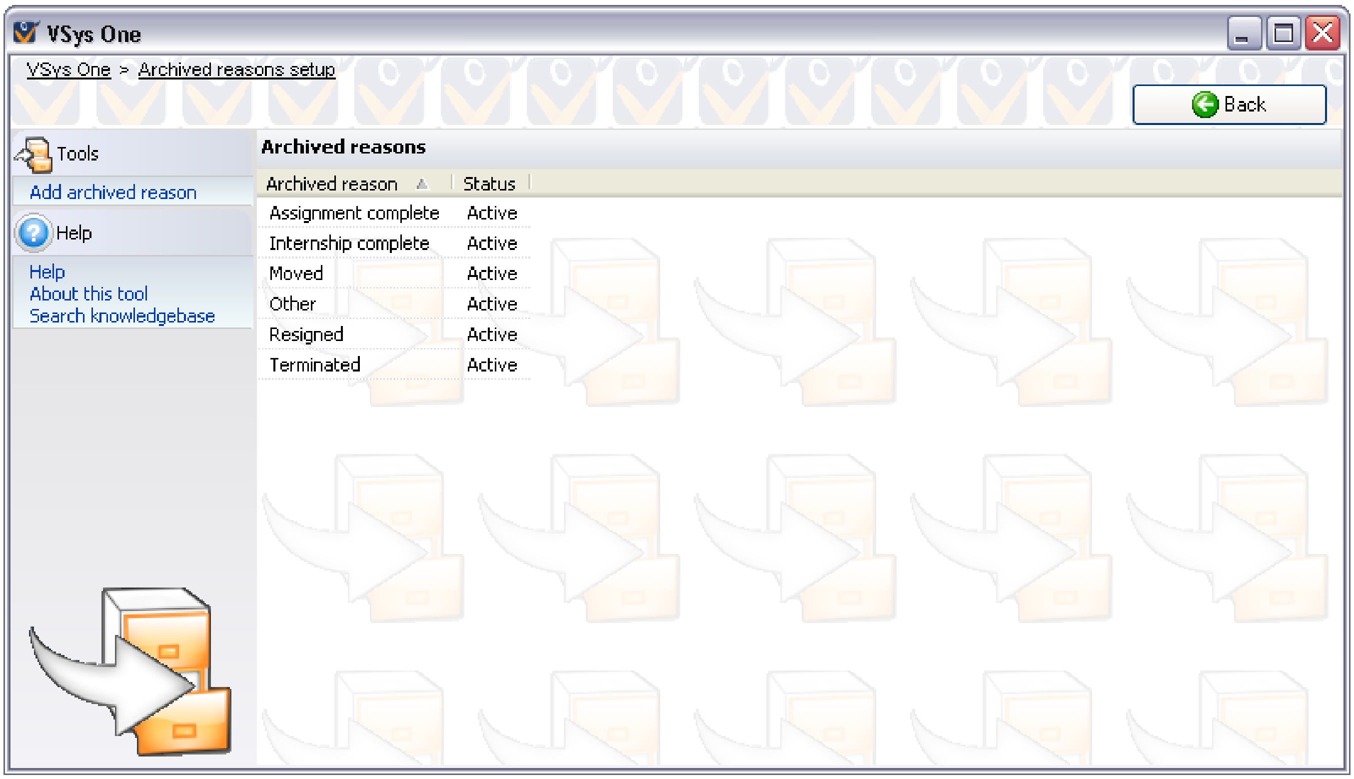
People can be archived in GMS, that is, taken out of the pool of people normally contacted or worked with. This does not remove them from the database, and all of those person's hours and assignments remain visible and reportable everywhere.

When to use

Set up the reasons that you might want to remove someone from your active corps of Individuals. Perhaps they completed a fixed assignment, or perhaps they moved or resigned.

How to use

In order to track why someone was marked as archived, GMS lets you define any number of reasons and have those available in the profile editor (page 18). Set up archived reasons by clicking on Archived reasons on the Setup panel.



Tools

On the left side of the screen.

Add archived reason	Creates a new archived reason.

On the right-click menu

Right-click on an item in this list to edit its properties and for other relevant tools.

Add archived reason	Creates a new reason.
View	Opens an existing reason in read-only mode.
Edit	Edits an existing reason's name.
Make inactive	An inactive reason no longer comes up in editors and filter options, but it's not deleted from the people who have it.
Delete	Deletes a reason.

Caution:	Deleting an archived reason removes that reason from all people who currently have it, but does not de-archive the person.

Banned Reasons

Concepts

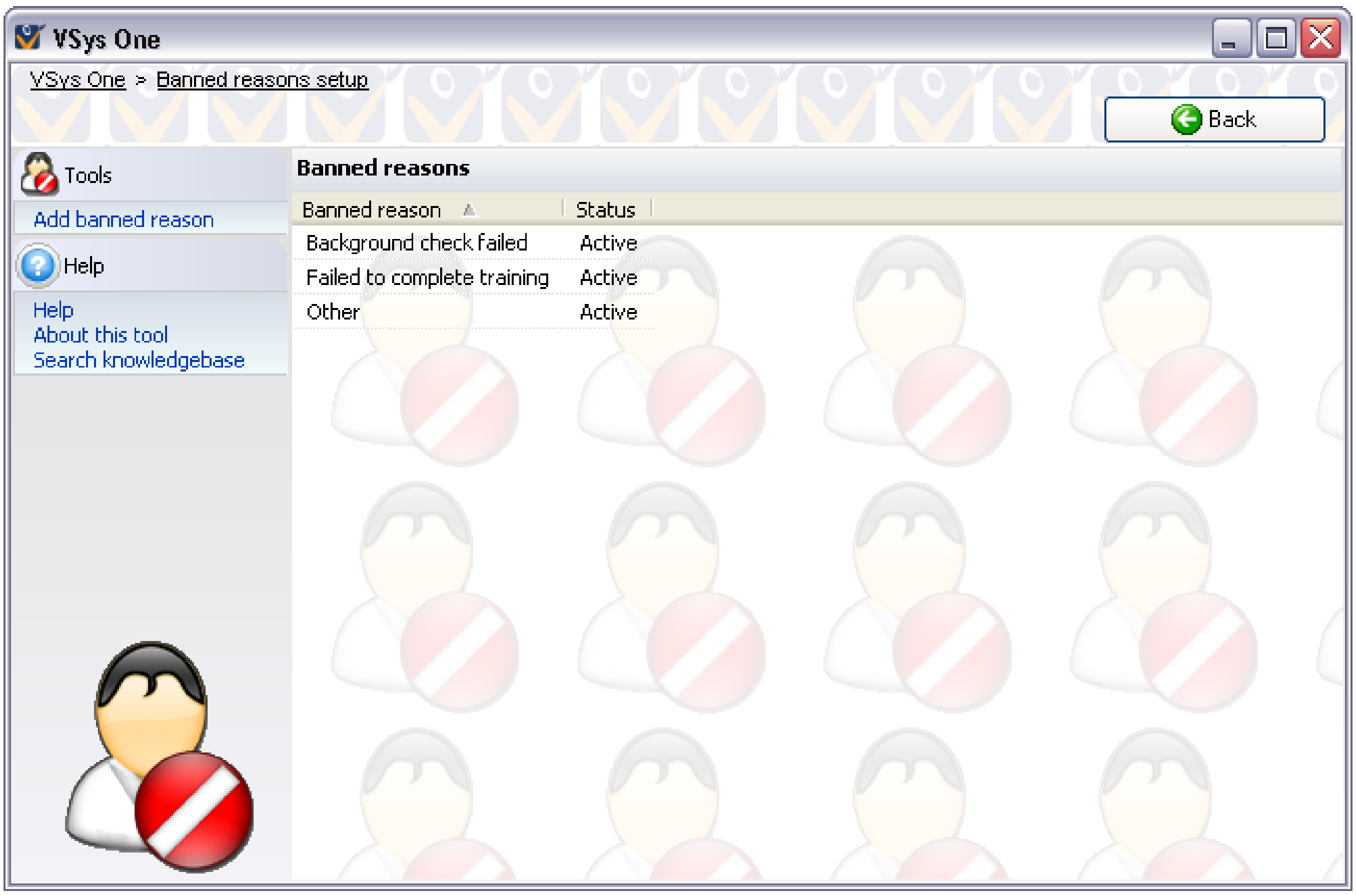
People can be banned in GMS, that is, marked as undesirable and never allowed to participate.

When to use

In order to track why someone was marked as banned, GMS lets you define any number of reasons and have those available in the profile editor (page 18). Reasons here are reportable in GMS.

How to use

Set up banned reasons by clicking on Banned reasons on the Setup panel. Use the Add banned reason link to define a new reason, or on an existing one to edit or delete that reason.



Caution:	Deleting a banned reason removes that reason from all people who currently have it, but does not un-ban the person.

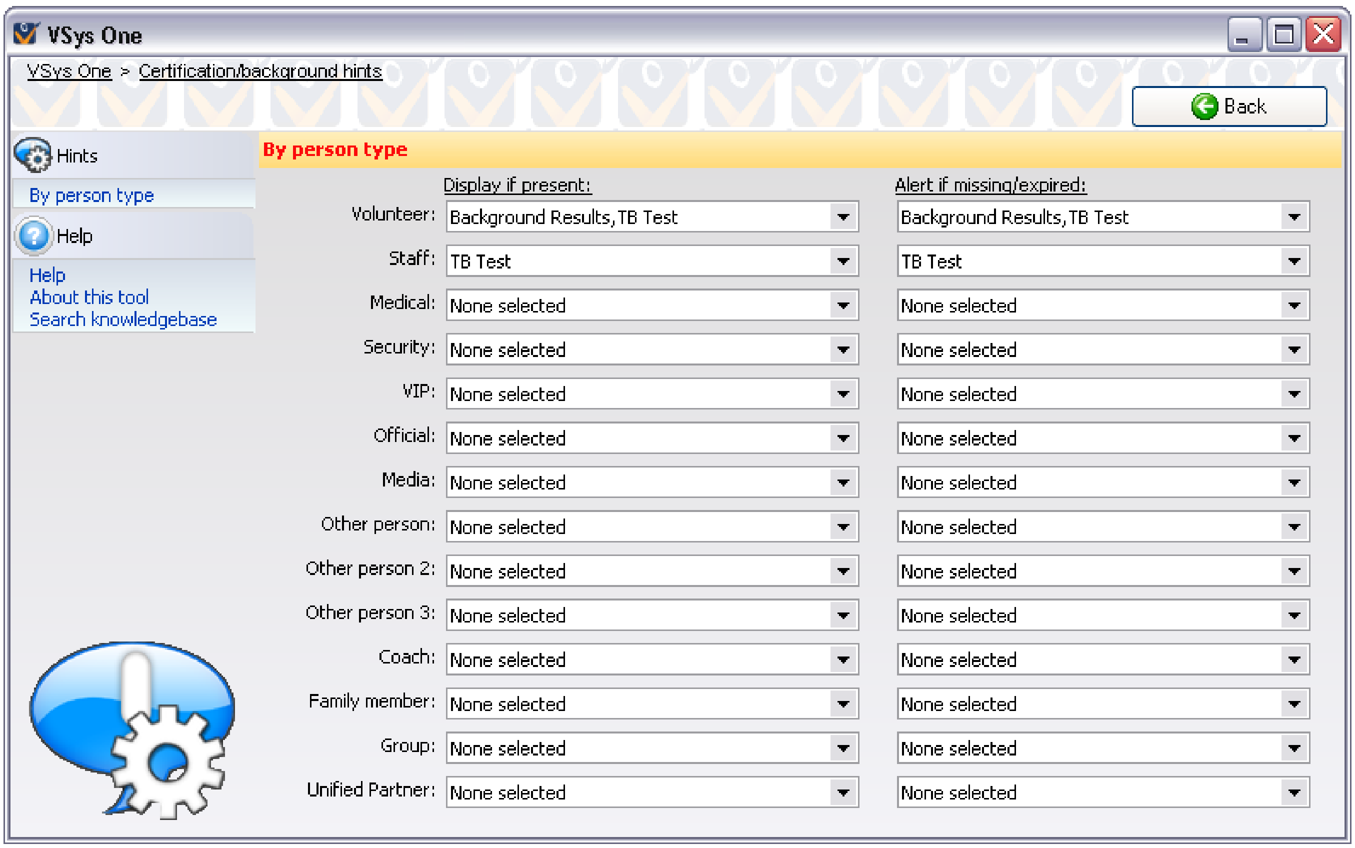
Certification/Background Check Hints

Concept

Along with addresses, availability and preferences, certification hints appear above people in lists when you hold your mouse over them for a few seconds. This tool allows you to define which background checks will be displayed and which will alert for expired or missing certifications.

How to use

For each type of person, in the first column select from the drop-down menu which background checks and certifications to display. In the second column select any background checks or certifications for which you want alerts. If any certifications of these types are either not present or are expired, an alert will show in red as part of the hint for that person.



Certifications

Concepts

GMS 6 allows you to create objects called "certifications" which contain multiple bits of information in one place.

When to use

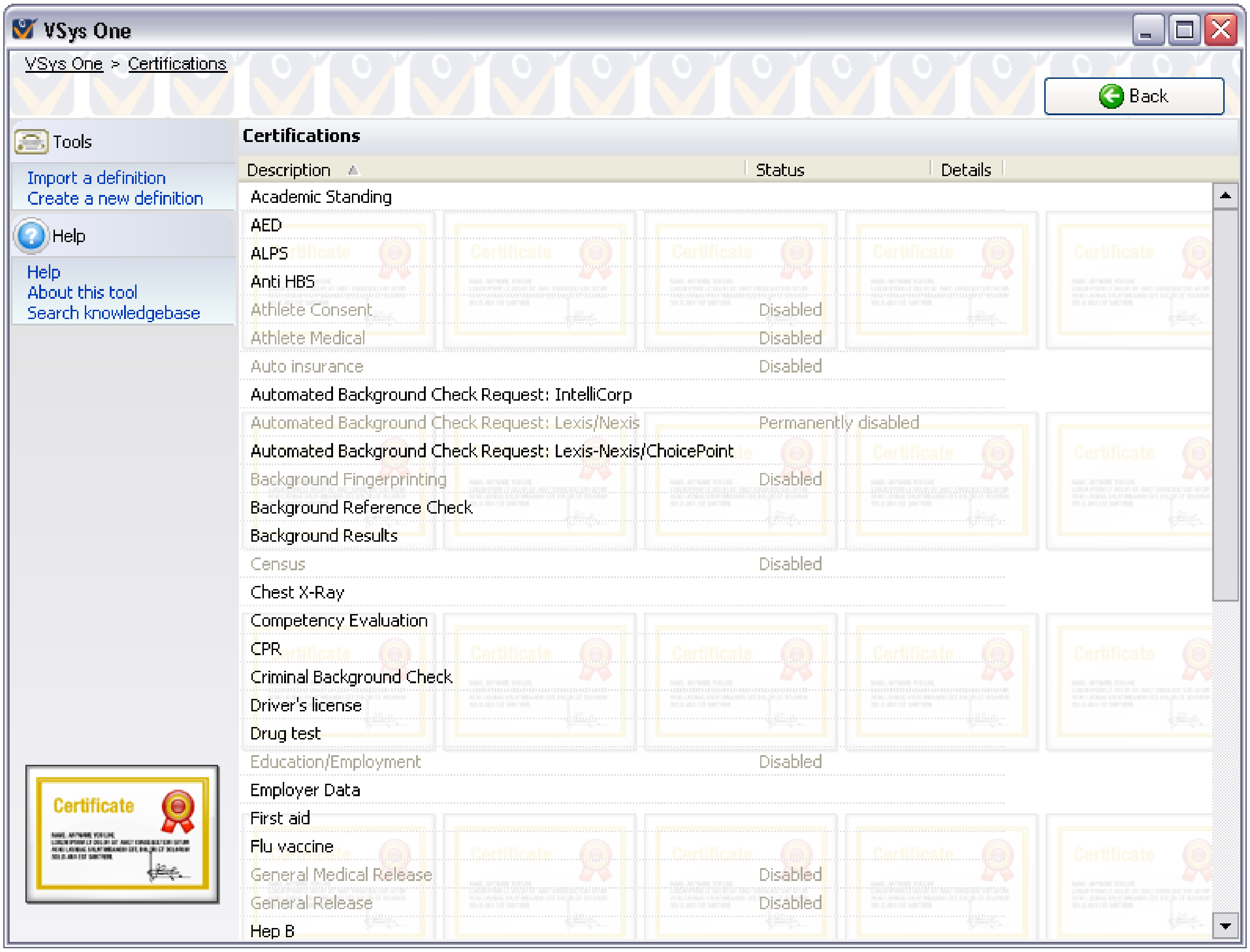
- They're commonly used for things like TB tests, tracking training and licensing requirements, or imported reminders from other programs.
- Background checks - in all of their forms in GMS - are other types of certifications.

How to use

GMS comes with a built-in list of certification definitions, and you can create your own, modify the existing ones, and mark certification types as disabled.

Certifications Setup

Open the **Certifications Setup** tool by clicking on **Certifications** from the **Setup** panel.



On the right-click menu

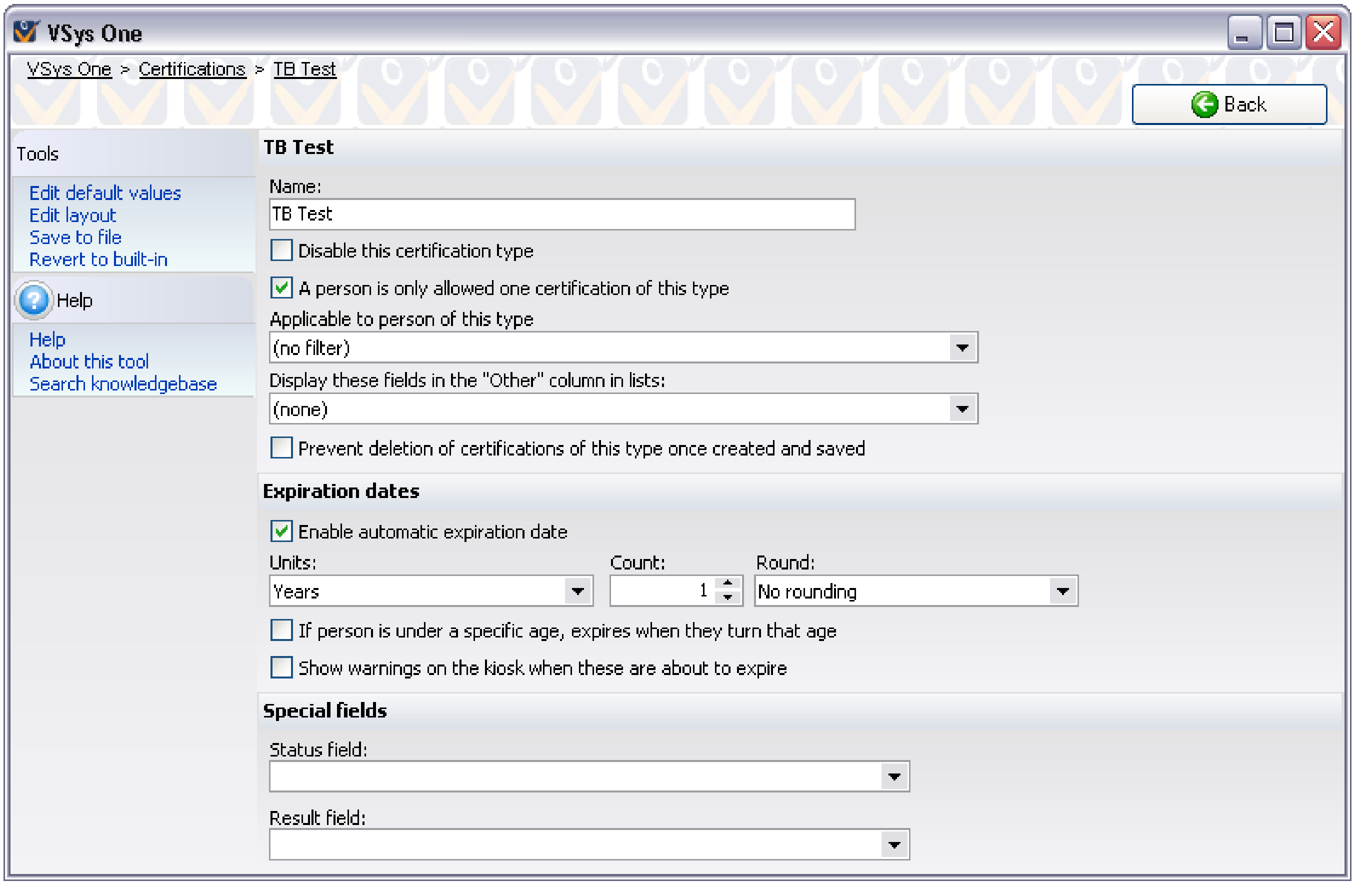
Right-click on an item in the list above to edit its properties and for other relevant tools.

Import a new definition	Imports a saved certification definition from a disk file.
Create a new definition	Makes an all-new certification definition.
Edit	Edits an existing reason's name.
Delete	Deletes this certification's definition. Not available for any of the built-in definitions, and GMS will not let you delete the definition of a certification if anyone has that certification.

Caution: New certifications created in GMS will be incompatible with GMS 5, and in fact will cause GMS 5 to throw regular error messages. If you use GMS, you don't want to create any custom certifications in GMS.

Certification Definitions

A certification's definition lets you configure how it will work within GMS.



Field	Description
NAME	Description of the certification. Changing this value affects all existing certifications.
DISABLE THIS CERTIFICATION TYPE	Prevents new certifications of this type from being created.
EACH PERSON ALLOWED ONLY ONE OF THIS TYPE	If a person already has a certification of this type, prevents the creation of a new one. A person who already has more than one will not have any deleted automatically, and merging two people together can still result in the kept person having more than one of these.
APPLICABLE TO THESE TYPES OF PEOPLE	Only people with one of these as their primary or additional types can have a certification of this type added.
DISPLAY THESE FIELDS ON THE "OTHER" COLUMN IN LISTS	On lists of certifications and as part of the "Other" field in reports, fields checked here will be included.
PREVENT DELETIONS OF CERTIFICATIONS OF THIS TIME ONCE CREATED AND SAVED	If this is checked, once you create a certification of this type and save it in a person's profile it cannot be deleted. Use for things that need to stay such as background check information.
ENABLE AUTOMATIC EXPIRATION DATES	Turns on automatic expiration date calculations.
UNITS, COUNT, ROUNDING	Days, Months, Years or Specific date. Each comes with its own set of options for calculation.
IF A PERSON IS UNDER A SPECIFIC AGE...	If checked, and the person is currently under this age when the certification is added, the expiration date will be the person's birthday at that age.

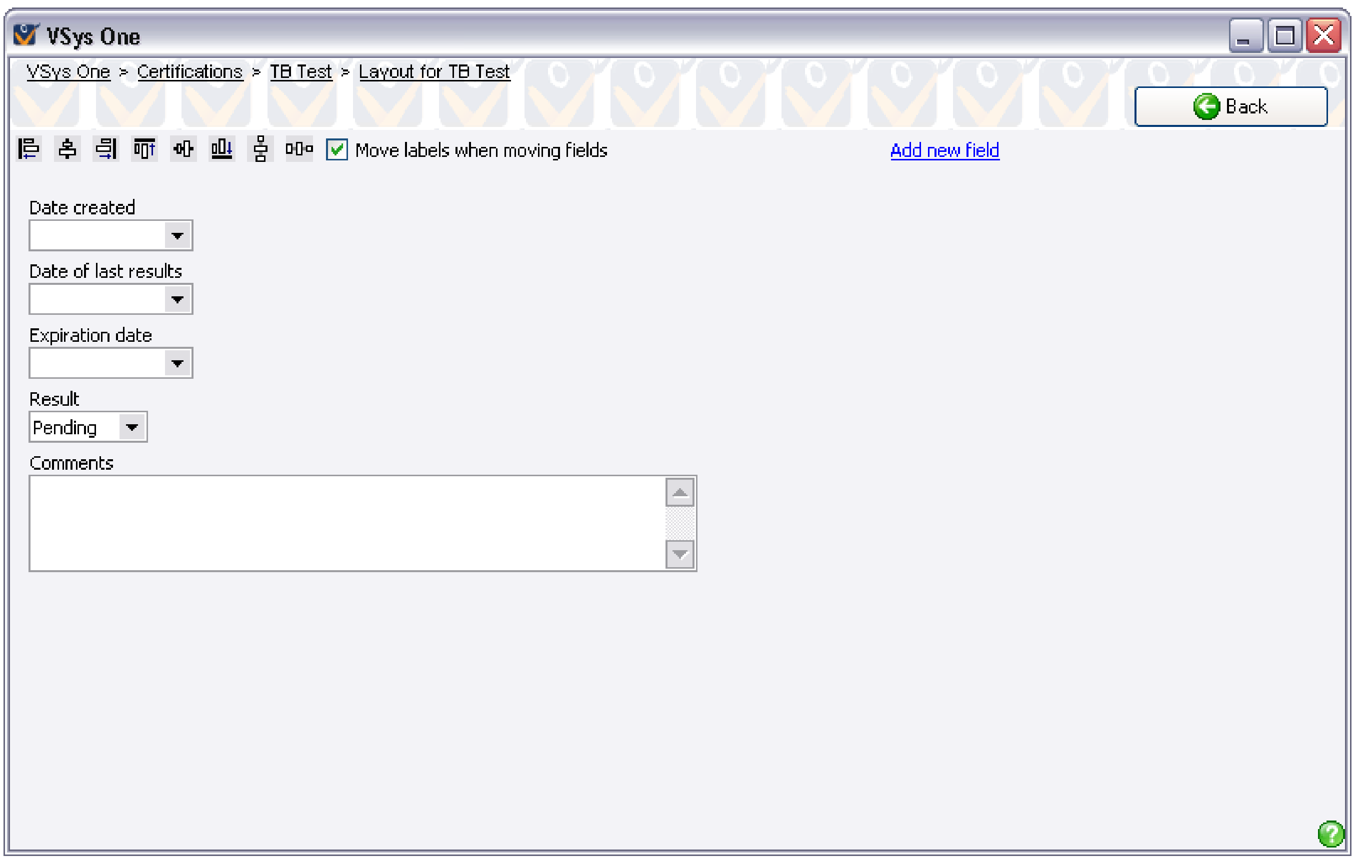
SHOW WARNINGS ON THE KIOSK...	When a Individual signs in at the kiosk, if a certification of this type is due to expire, they will get a warning at each of these days.
STATUS FIELD	For custom certifications, the field in the definition which should show in the STATUS column on lists and in reports.
RESULT FIELD	For custom certifications, the field in the definition which should show in the RESULT column on lists and in reports.

Tools

Edit default values	Sets the default values for each field which will be used when new certifications of this type are created.
Edit layout	Edits the layout - fields, options, and on-screen field configuration. Not available for certain built-in definitions.
Save to file	Saves the current definition to a disk file.
Revert to built-in	For built-in certification types, throws out any definition changes and uses the built-in definition instead.

Certification Designer

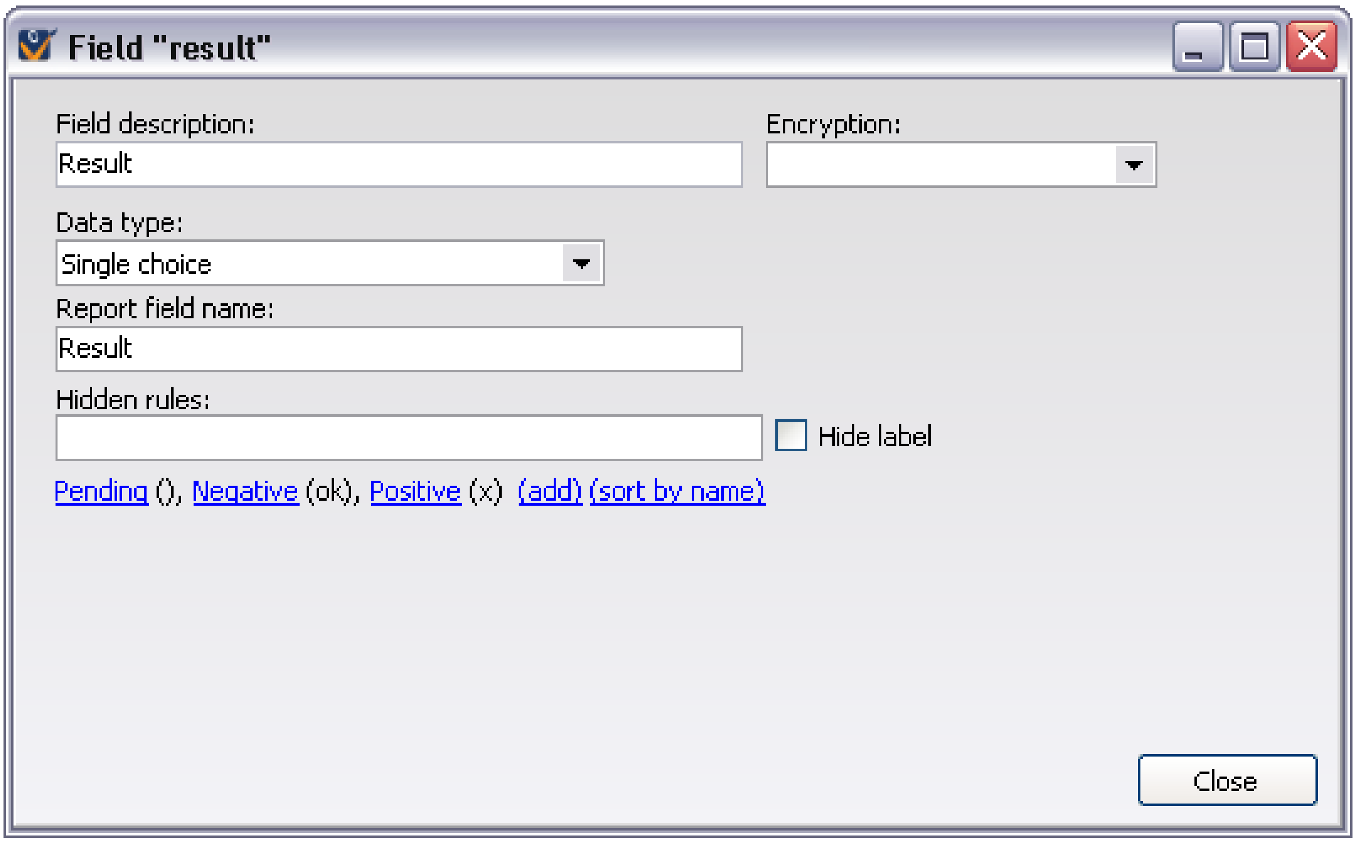
The certification designer lets you add, edit and remove fields from the certification's definition. GMS lets you have an unlimited number of fields on each certification, only requiring that each field have its own unique code.



Actions

- Click on Add new field to define a new field.
- Click and drag any field around to move or resize it.
- MOVE LABELS WHEN MOVING FIELDS: when checked, and you drag a field around, its corresponding label will move relative to the field.
- The alignment tools at the upper-left can be used to help arrange the fields. Select two or more fields, then click on the appropriate icon. From left to right, these icons mean: Align left, Align centered horizontally, Align right, Alight top, Align centered vertically, Alight bottoms, Space equally vertically, Space equally horizontally.
- Right-click on any field to edit or delete it.
- You cannot change the code of a field once it's been created.
- Changing the data type or options for a field may cause GMS to misinterpret the fields for certifications of this type which already exist.

Editing a field



Field	Meaning
FIELD DESCRIPTION	How the field is described on reports, filters, etc.
ENCRYPTION	To encrypt this field, choose an encryption group. The field won't be encrypted if the encryption keys for this group have not been created.

DATA TYPE	Text	A simple text field with optional maximum length.
	Number	A "spin edit" number field.
	Weight	Editor for weights in pounds or kilograms.
	Date	Date editor with calendar pick control.
	Checklist	A drop-down checklist of your defined values.
	Single choice	Of your values, allows the selection of just one. (To allow the user to enter a blank value, define an option with a blank code.)
	Checkbox	Simple checkbox.
	Link/role	A link from this person to another person, usually used for things like coaches or supervisors.
	Expanded checklist	Identical to the "Checklist" control.
	Magic checklist	A checklist as a text field. The user types in a comma-delimited list of the codes or magic codes, which are then automatically verified against the list of valid codes. These are great for fields like "State" or "Province" since they can type in their values without having to use the mouse, yet the values they type in are validated against the list of acceptable values.
	Label	A static label for identifying other fields or regions, not editable by the user.
	Text memo	A multi-line text edit field.
	Horizontal line	A horizontal line which can be used to identify sections or for visual effect, not editable by the user.
	Address	One of the addresses for the associated person. Most commonly used to edit the person's Emergency Contact address from within a Medical form. Note: addresses cannot be encrypted.

REPORT FIELD NAME	How this field is named in reports.
HIDDEN RULES	This is not a documented feature.
HIDE LABEL	If checked, on the certification's editor (where you enter data into a certification), the label, in this case "Testing facility", will not be shown.
OPTIONS	For Single choice, Checklist, Expanded checklist and Magic checklist data types, the descriptions and codes for the stored values.

Special Field Codes

Every field in a custom certification must have a unique code, and that code cannot be changed once the field is created. There are special field codes that GMS uses and expects to see. If these are not present GMS will work fine, but the columns for those fields will appear blank.

Field code	Meaning
created	"Certification created date"
sigdate	"Effective date"
expdate	"Expiration date"

It does not matter what field is named "Expiration date" - GMS will use the field with the code "expdate" as the expiration date, and it does not matter what the field with the code "expdate" is named, GMS will use it internally as the expiration date.

Certification Defaults

Concepts

Defining default values for a certification type means that new certifications and background checks of the type you specify will be created with the values you enter here. Edit a certification's default values from within the certification's setup (page 207), by clicking on Edit default values.

Defaults Editor

What you'll see on screen looks very much like a certification or background check editor, with a few exceptions:

- Some types of fields cannot be edited, including role and address fields
- The addition of the DELETE ALL OF THESE DEFAULTS VALUES checkbox at the top.

Edit the fields as appropriate. To remove all default values for this certification type, check the DELETE ALL OF THESE DEFAULTS VALUES checkbox.

Changes made here do not affect any existing, saved certifications - only newly-created ones will appear wit these values.

Contact Flags

Concept

Contact flags are used to indicate ways in which specific Individuals should or should not be contacted.

When to use

Use them when doing mail merges, printing mailing labels or sending e-mails to filter out people who don't want to be contacted. Contact flags can also be used to show how a person *wants* to be contacted. For example you could define the contact flag "Send newsletter" to designate people who want to receive newsletters.

How to use

Right-click to add all BUILT-IN contact flags, or click Add contact flag to create a new one of your own. Options here will show up as a drop-down menu options in the Additional data panel of a person's record.

There are several built-in contact flags which you cannot change or delete, e.g. "Do not call", "Do not e-mail" and "Do not mail".

Caution: Deleting a contact flag removes that contact flag from all people who currently have it.

Custom Fields

Concepts

Custom fields are user-defined fields of different types. You can associate custom fields with different types of people, creating fields that GMS 6 does not have. Custom fields defined within a Games are only available within that Games. Those defined globally are available everywhere, including within all Games. For custom fields which will likely vary in value from one Games to another, define the custom field within each Games.

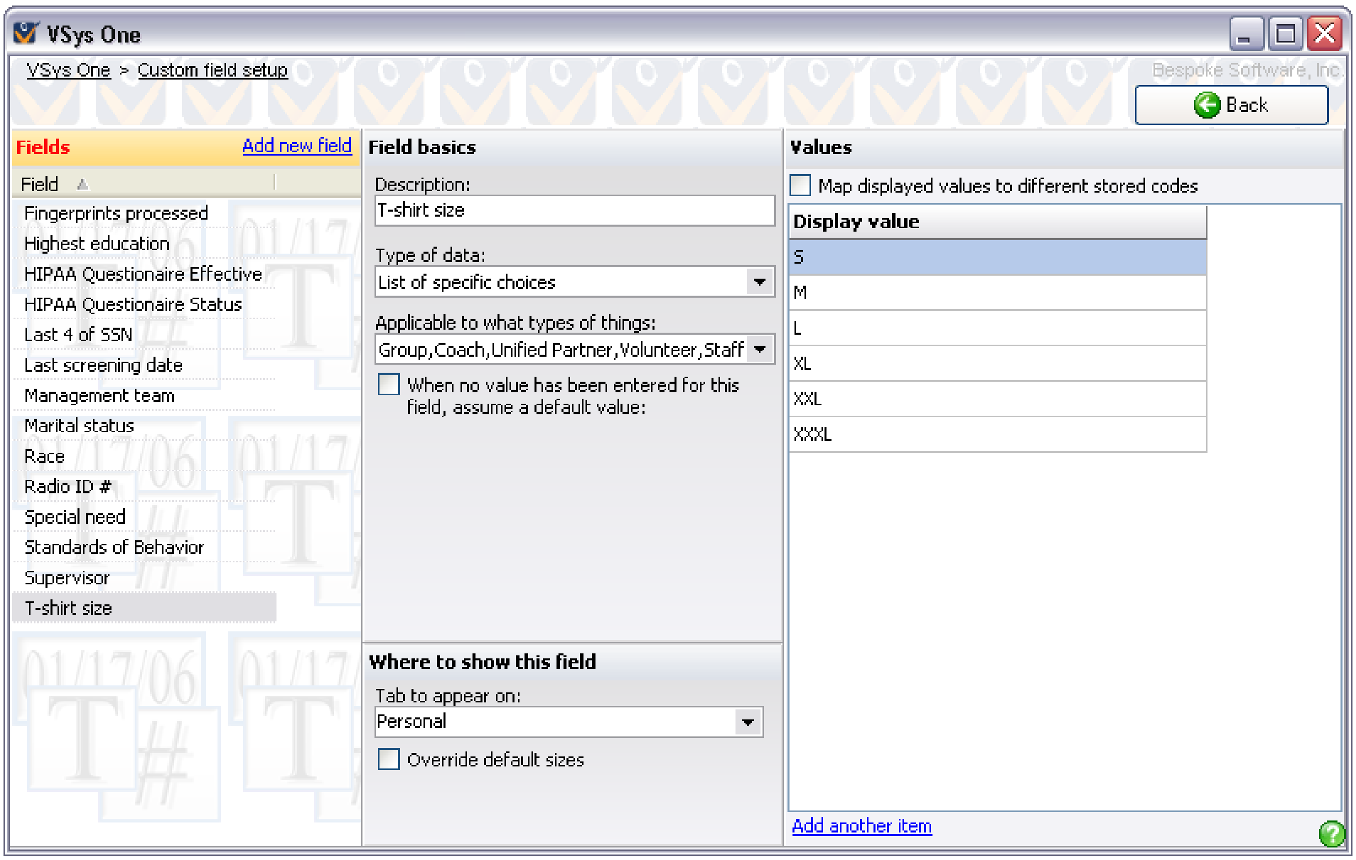
When to use

You can print custom fields on many reports and include them in mail merges and ***exports*** (page 150), as well as filter people by their custom field values.

How to Use

Define custom fields globally by clicking on Custom fields from the Setup panel. For Games-specific custom fields, right-click on the Games's name from the Games panel and select Setup (custom fields).

Click on a custom field's name to edit its properties, or on the Add new field link to create a new custom field.



Field Basics

These values are common to most (or all) custom fields.

DESCRIPTION	This is the text that appears next to the field in various editors and is used to select this field for reporting. Note: changing the field's name does not affect any data already stored for this field: GMS uses an internal, hidden ID code for matching the data to the field itself.
TYPE OF DATA	See ***Custom Field Data Types*** (page 214).
APPLICABLE TO WHAT TYPES OF THINGS	Custom fields can be applicable to various types of people as well as to groups. Choose the ones this field should be shown with.

WHEN NO VALUE HAS BEEN ENTERED...	See ***Custom Field Default Values*** (page 214).
TAB TO APPEAR ON, OVERRIDE DEFAULT SIZES	See ***Where to Show This Field*** (page 215)

Custom Field Data Types

Every field has a specific kind of information that you're able to enter into it.

TYPE OF DATA	Description/usage
Text	A character text field that can hold any information. It is not validated against any lists or types.
Checkbox	A checkbox that represents a yes/no or true/false value. By default this field will be unchecked until you change it for each person, so be careful how you word this field.
Memo (long text)	An extended version of the text field. It appears larger and holds unlimited information but can be problematic when trying to print on reports if it runs too long.
Number (with decimals)	Holds only numeric values. You set how many decimal places the field contains. When selecting this field, you can set the number of decimal places as well as a minimum and maximum value for this number.
Number (no decimals)	A numeric field that contains no decimal places. You have the option here to set a minimum and maximum value for this field.
Date	Dates are entered in the format that you specify under System Preferences. There is an option for this field to apply minimum and maximum data ranges.
List of specific choices	A list where you can select exactly one value from the list that you define. Each item in the list can optionally be associated with a code, which GMS would then store in place of the text.
Checklist of specific choices	A drop down list of checkboxes, where you can check any number of items from the list (including none). As with the List of specific choices, items can be associated with codes which would then be stored instead of the text.
Grouping	These fields allow multiple people to be assigned to them to form a group (for example, housing roommates). Choose the types of people that can grouped together, the maximum number of entrants in the group, and if you want to limit membership to one people in a single delegation or of a single gender.
Role	Used to associate one person with another (for example, a coach).

Default Values

For most types of fields, you can assign a default value. A default value is one that is assumed when no other data has been entered. For example, if you defined the custom field "Preferred Swag" as a list of specific choices, and you know that most of your Individuals are going to want t-shirts rather than baseball caps or sweatpants, you could set "T-shirt" as the default value for that field. Anybody who is entered will then start out with the value "T-shirt", and you only need to edit those people who want something else.

Where to Show this Field

This section specifies how GMS 6 should display this field in the Custom fields panel of the Profile Editor screen.

Within that panel, you can organize your custom fields:

- Create a new tab by simply typing its name in the TAB TO APPEAR ON field.
- Use an existing tab by selecting it from the list.
- WIDTH and HEIGHT override the normal sizes of the field. Leave one or both at zero to let GMS size the field for you.
- ORDER ON THIS TAB sets the order in which each field appears on its respective tab. GMS will sort the fields by this value, then display them in this order.

If you have just a small number of custom fields, or don't care how they are ordered in the Profile Editor, you can leave all of these settings blank/zero.

List and Checklist Hints

Field value mapping

For fields which are List of specific choices or Checklist of specific choices, you have the option of mapping displayed values to different stored codes. What does this mean? Let's take the hypothetical scenario of the field "Preferred swag". It has the values:

T-shirt

Sweatpants

Baseball cap

If you don't check the box MAP DISPLAYED VALUES TO DIFFERENT STORED CODES, GMS stores the value "T-shirt", "Sweatpants" or "Baseball cap" for each person. This is fine until you decide next year to rename one of the values from "Baseball cap" to "Sports cap" in order to avoid being sport-ist. When you do that, the stored values for people who preferred baseball caps are no longer valid!

Instead, if you did use stored codes, your setup could look like this:

T-shirt	T
Sweatpants	S
Baseball cap	C

Now, GMS doesn't store "Baseball cap", it stores "C" instead. Changing the description for "Baseball cap" to "Sport cap" means that everyone who previously had "Baseball cap" as their preference now has "Sport cap" - no confusion.

Importing

When importing fields using the ***Interactive File Importer*** (page 160) or the General File Importer, GMS lets you use either the value's description, e.g. "T-shirt", or its stored value, e.g. "T". It's important to make sure that you don't have two values with the same description or code, or GMS may import your data in an unexpected way.

Deleting a Custom Field

Deleting a custom field definition will delete the data associated with it from any object. This will happen when you save all custom field changes. You can prevent the deletion by right-clicking on the field and selecting Un-delete, or by not saving your changes. Once the save process has begun, it may take a while to delete the associated data, and the process cannot be canceled. Once GMS has deleted the field, the data is inaccessible forever.

Changing Custom Field Types

Changing the type of data for an existing custom field can be hazardous to your data. The following table shows which data types can safely be changed into another and what may happen to data during the transition. Changes marked as “Invalid” will not be prevented by GMS, but may result in some very odd conversions.

Target type -> **Source type**	**Text**	**Check box**	**Memo**	**Number (without decimals)**	**Number (with decimals)**

Target type -> Source type	Text	Check box	Memo	Number (without decimals)	Number (with decimals)
Text	n/a	Invalid	OK	Invalid	Invalid
Checkbox	OK	n/a	OK	Invalid	Invalid
Memo (long text)	May be truncated	Invalid	n/a	Invalid	Invalid
Number (without decimals)	OK	Invalid	OK	n/a	OK
Number (with decimals)	OK	Invalid	OK	OK	n/a
Date	Invalid	Invalid	OK	Invalid	Invalid
List of specific choices	Will be name or code	Invalid	Will be name or code	Invalid	Invalid
Checklist of specific choices	Will be comma-delimited list of names or codes	Invalid	Will be comma-delimited list of names or codes	Invalid	Invalid
Grouping	Invalid	Invalid	Invalid	Invalid	Invalid
Role	Invalid	Invalid	Invalid	Invalid	Invalid

Target type -> Source type	Date	List of specific choices	Checklist of specific choices	Grouping	Role
Text	Invalid	Invalid	Invalid	Invalid	Invalid
Checkbox	Invalid	Invalid	Invalid	Invalid	Invalid
Memo (long text)	Invalid	Invalid	Invalid	Invalid	Invalid
Number (without decimals)	Invalid	Invalid	Invalid	Invalid	Invalid
Number (with decimals)	Invalid	Invalid	Invalid	Invalid	Invalid
Date	n/a	Invalid	Invalid	Invalid	Invalid
List of specific choices	Invalid	n/a	OK if codes or names compatible	Invalid	Invalid
Checklist of specific choices	Invalid	OK if codes or names compatible and zero or one items checked	n/a	Invalid	Invalid
Grouping	Invalid	Invalid	Invalid	n/a	Invalid
Role	Invalid	Invalid	Invalid	Invalid	n/a

Custom Sports

Concept

Because of GMS 6's connection with GMS, GMS allows you to connect jobs and assignments to specific sports. You can filter, sort and search for jobs based on their sport. Custom sports here let you define new sports which GMS and GMS don't natively come with. Many sports come built-in with GMS 6.

How to use

Open the Custom Sports Manager by clicking on Custom sports from the Setup panel on the main GMS 6 screen. This brings up a list of all custom sports currently defined.

If sports are not enabled in your GMS 6 installation, you won't see this setup tool.

Groups

Concepts

Groups indicate a person's affiliations, such as a local team, employer, church/civic organization or geographic region. Groups can also be used to differentiate among Individuals in different areas of a larger organization, e.g. hospitals within a single system.

When to use

Assigning a person to one or more groups lets you filter people for lookup, reports, mailing lists, etc.

How to use

Open the Groups Manager by clicking on the Groups link on the Setup panel from the main GMS 6 screen. Click the Add new link to add a new Company or Group to your list.

The group "General" is always automatically created and cannot be deleted, though it can be renamed.

Tools

Add new	Asks you for a group type, then creates a new group of that type.
Filter types	Asks you for a group type to display, then only shows groups of that type. Select (all) there to see groups of all types.
Setup group types	Opens up the group types editor. Use this to define the types of groups applicable to your organization.
Show non-GMS 6 groups	If a group is defined as GMS-only, it normally will not show on this list. Check this box to show GMS-only groups.

On the right-click menu

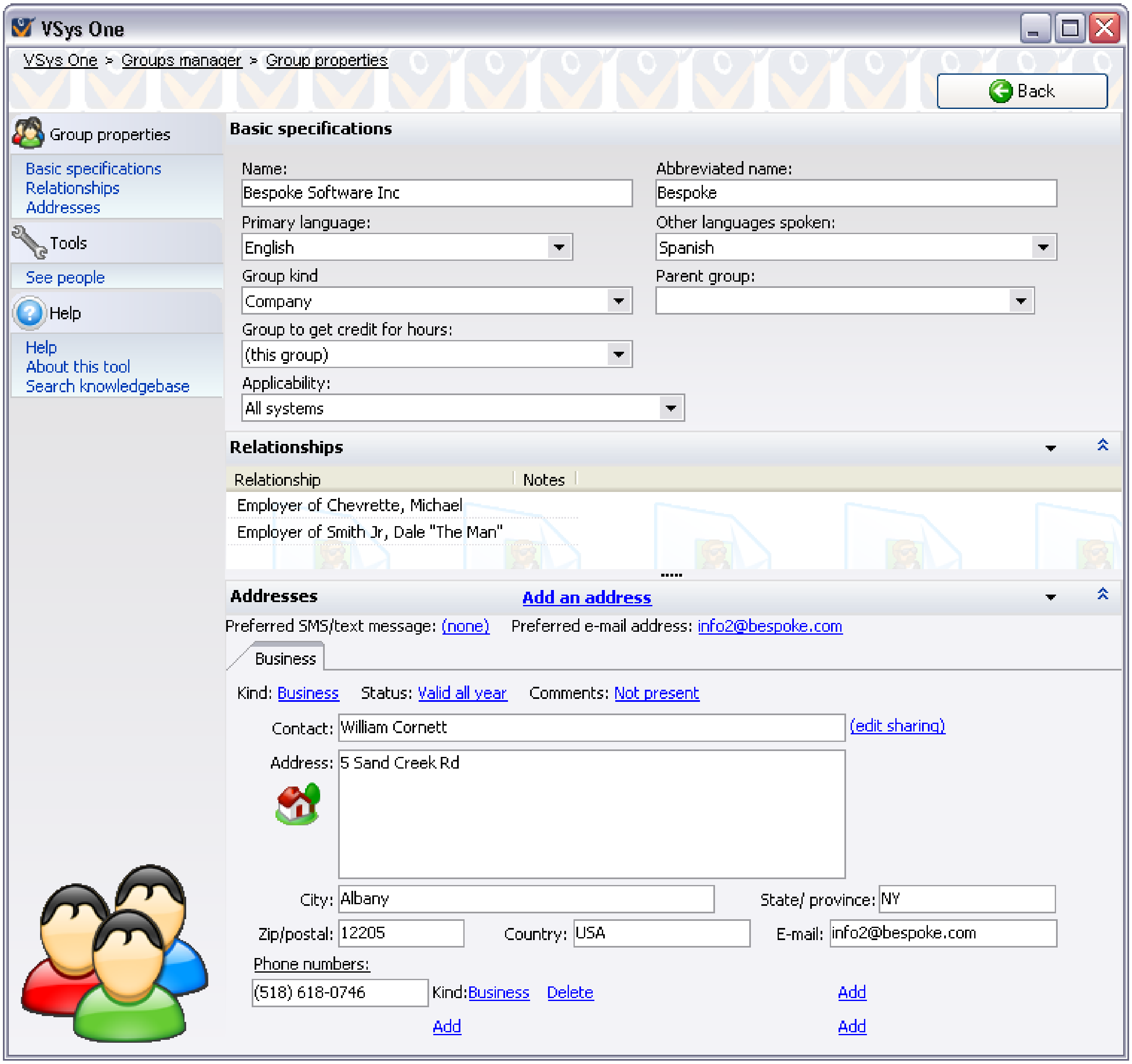
Right-click on a group in this list to edit its properties and for other tools relevant to specific groups.

Add	Asks you for a group type, then creates a new group of that type.
View	Opens the group properties screen in read-only mode.
Edit	Edits the properties of this group.
See people	Shows all people affiliated with this group and allows you to edit them.
Change type	Prompts you to change the group's type. This does not affect the people within the group.
Delete	Deletes this group, without deleting the people within that group.

Just delete it	If a person’s primary group is deleted, he will no longer be searchable by group, but will continue to exist.
Move its people...	Changes all references in people to this group as a primary or additional group to the new group you select, and copies this group's addresses and other properties to that group.

Groups in GMS 6 are the same as Permanent Delegations in GMS. GMS 5 and earlier cannot see or look up people based on the ADDITIONAL GROUPS field, and only recognizes the person’s primary group.

Group Properties



Field name	Description
NAME	Group's full name.
ABBREVIATED NAME	This name is normally used on scoreboards in GMS, but can also be displayed in many custom reports.
PRIMARY LANGUAGE	The primary language spoken by the people in this group.
OTHER LANGUAGES SPOKEN	Any other languages commonly spoken by people in this group.
GROUP KIND	The type of group this represents.
PARENT GROUP	Allows the nesting of one group within another for selection via checklist or drop-down editor and in reports.

GROUP TO GET CREDIT FOR HOURS	When Individuals are given credit for their hours, their primary group normally also gets credit for them. If this group is a subsidiary of some other group, or you want another group to get credit for the people in this group, select it here. Note: this only applies to newly-credited hours, not ones done in the past.
APPLICABILITY	Determines whether this group is shown in GMS 6 only, VSys only, or in both systems. Making a group inapplicable to either system does not remove it or make it inaccessible, it just suppresses it from some lists.
Relationships	People who are related to this group using their Relationships panel.
Addresses	The address of the group itself. This can be used in mailings.

Group Types

Concept

Group types let you subdivide groups into categories.

When to use

Assigning a group type to a group lets you filter groups for lookup, reports, mailing lists, etc.

How to use

Open the Group Types Manager by clicking on Group types from the Setup panel on the main GMS 6 screen. This brings up a list of all group types currently defined.

Assigning a group type to a group lets you define where that group is valid. In this example, groups of the type Additionals can only be used as additional groups for people, and cannot be used as the person's group or company

The group type "Group" is always automatically created, cannot be edited or deleted, and is the default type for all newly created groups.

Deleting a group type does not delete the groups or people within that groups of that group type. Affected groups will show as group type "unknown" and no longer be searchable by group type.

Inactive Reasons

Concept

People can be marked as inactive in GMS, meaning that they are not currently participating but may do so again in the future.

When to use

Use an inactive status when someone is temporarily not Individualing, perhaps because of a medical reason or travel plans. This allows you to track and report on why your Individuals might be taking a break from Individualing. The "inactive" status is designed for Individuals you expect to return. If you expect they are leaving permanently you would probably want to archive them as well.

How to Use

GMS lets you define any number of reasons why someone is inactive and have those available in the profile editor. Set up archived reasons by clicking on Inactive reasons on the Setup panel. Add the reasons you would like to track.

Caution:	Deleting an inactive reason removes that reason from all people who currently have it, but does not make those people active.

Locations

Concepts

Locations are used to identify:

- where jobs are being performed, and therefore where Individuals need to be,
- where Individuals are available, and
- where trainings are being held.

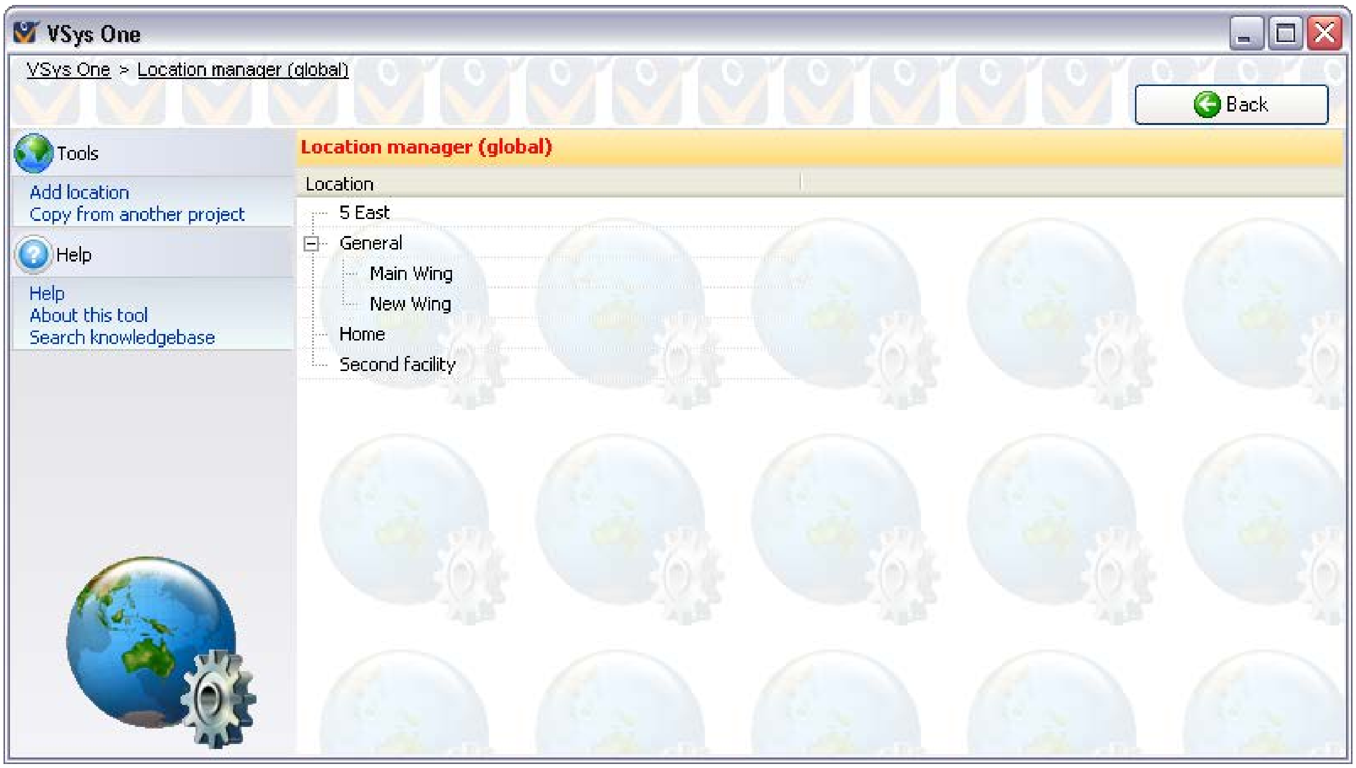
By including postal codes and/or latitude/longitude information with each location, GMS can use that data when searching for jobs and trainings to locate individuals within a certain distance of some other point.

Locations in GMS 6 are *hierarchical*, meaning nested. This lets one location be within another location, and have further locations within that.

Locations are Games-specific. A Games can copy locations from another Games or from the global locations, but changing one Games's locations doesn't affect any other Games.

How to use

Open the Locations Manager from the Setup panel from either the GMS 6 main screen or a Games.



Tools

On the left side of the screen.

Add location	Opens the location editor to create a new location.
Copy locations from elsewhere	Shows other Games (including "global") that have locations. Select one or more locations to copy in order to add them to this Games.

On the right-click menu

Right-click on a location in this list to edit its properties and for other tools relevant to specific locations.

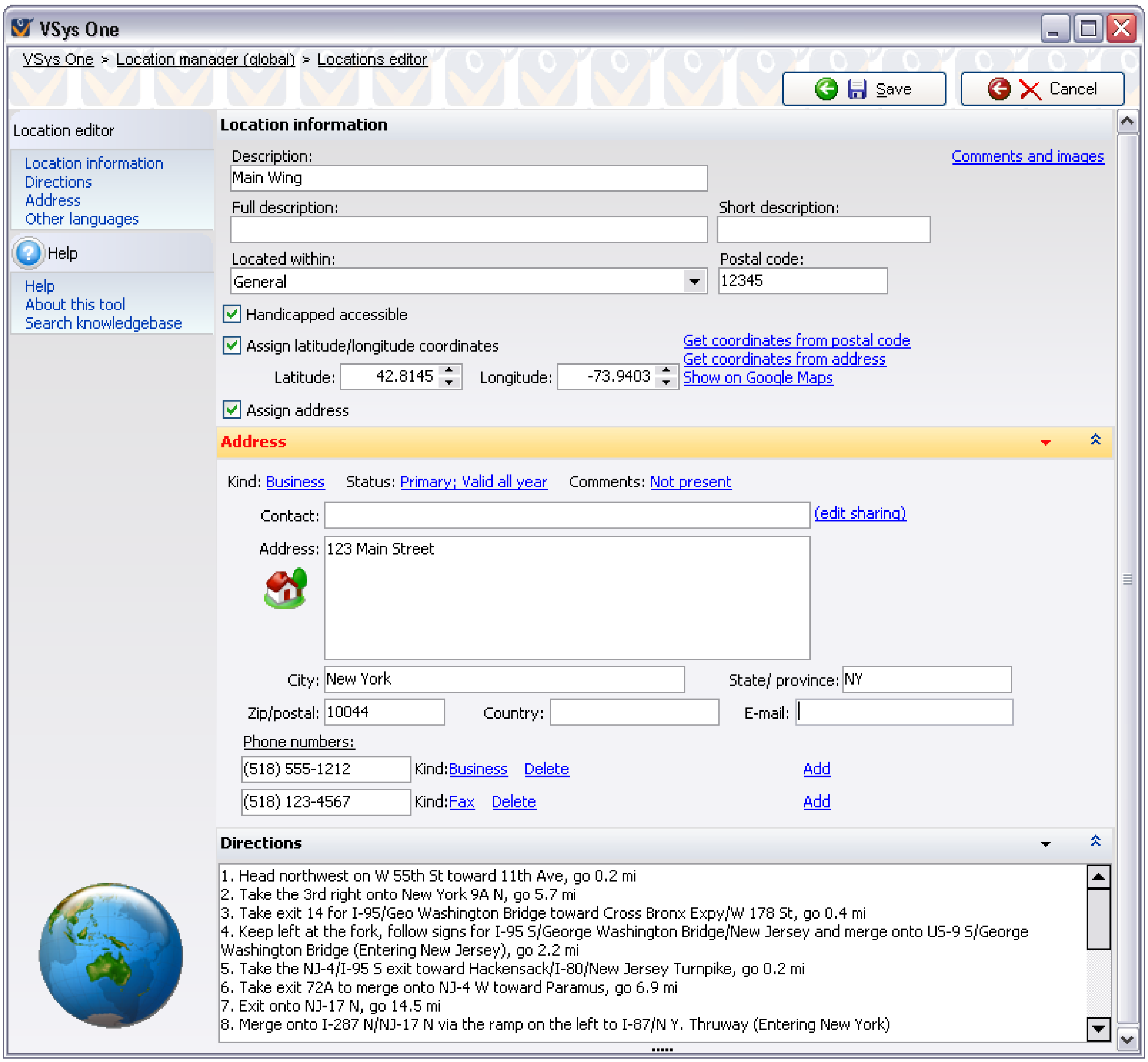
Add new location	Opens the location editor to create a new location.
Add new location within this location	Opens the location editor to create a new location, with the new location being a child of the currently selected location.

Edit	Edits an existing location's properties.
Merge with another location	Asks for the name of another location, then adds that location's children to this location.
Delete	Deletes a location along with all of the child locations within it.
Comments and images	Lets you associate pictures and comments with the current location.

Locations are stored by internal codes, not by name. Renaming a location renames it everywhere in this Games. If you delete a location, it is gone forever - making a new one with the same name will not bring it back or re-associate it with the things that used the old one.

Location Information

Clicking on a location brings up a screen for editing that location.



Field name	Description
DESCRIPTION	Description of the location.

COMMENTS AND IMAGES	Attach comments and images, such as photos or maps of the location.
FULL DESCRIPTION	Normally location names print showing their full hierarchy, e.g. "Troy.RPI.Library.Room 308". If you put a different description here, e.g. "RPI Library 308", that value will print in its place.
LOCATED WITHIN	The parent site for this location.
POSTAL CODE	Entering a postal code lets GMS try to determine its coordinates and is used in searches.
HANDICAPPED ACCESSIBLE	Check if this location is handicapped-accessible.
PLACEHOLDER LOCATION	If this location exists solely to hold other locations, check this box. It will prevent this location from being used to assign job slots, and suppress it from the slots/calendar tool.
ASSIGN LATITUDE/LONGITUDE COORDINATES	If checked, lets you enter coordinates for this location. The coordinates are used to find locations based on distance from some point.
LATITUDE	Standard geographic latitude.
LONGITUDE	Standard geographic longitude.
Get coordinates from postal code	Clicking this link tells GMS to look up the latitude/longitude coordinates for the location from the postal code.
Get coordinates from address	Uses the ***Google Maps*** (***http://maps.google.com***) API to find the exact latitude/longitude for this address. Use this to allow for advanced location searching in GMS.
Show on Google Maps	Launches your web browser and brings up this location in ***Google Maps*** (***http://maps.google.com***).
ASSIGN ADDRESS	If checked, GMS gives you a place to enter a full address for this location. This address can be used in reports.
DIRECTIONS	Enter directions to this location to have them appear in reports and available to include for Individuals.

Sample Locations

Troy	RPI	Student Union	Room 308
			Room 310
			Dining Hall
		Library	First floor conference center
			Second floor conference center
			Main hall
		87 Field	
	Sage College	Theater	
		Library	Room 101
			Room 102
			Room 300
		Gymnasium	
		Alumni House	
Albany	SUNY Albany	Dutch Quad	Stuyvesant Hall
			Beverywyck Hall

	Schuyler Hall
Baseball field	
University field	

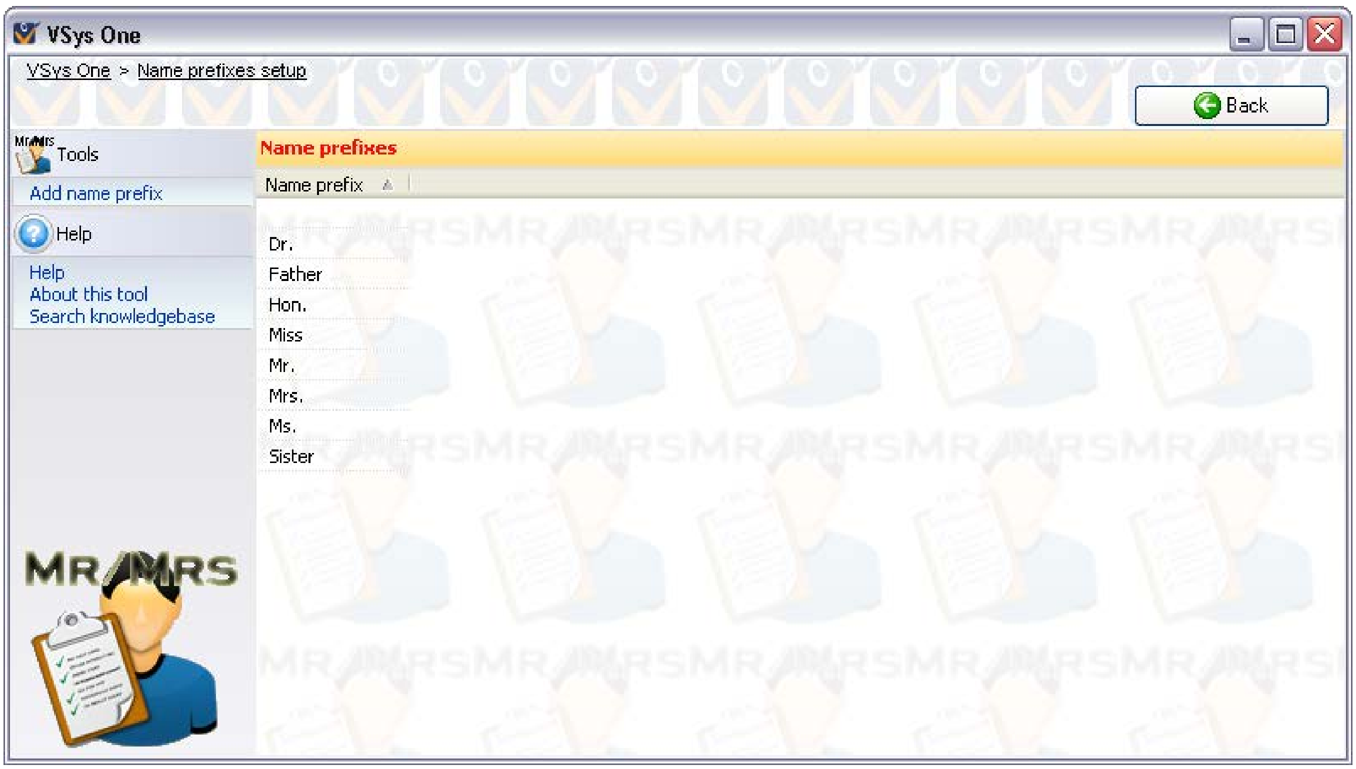
Name Prefixes

Concept

Name prefixes are the "Mr.", "Mrs.", "Dr." and other honorifics which appear before other parts of a person's name when printed. GMS gives you a specific field for this in the profile editor, and allows you to use one of the designated prefixes or enter a new one on-the-spot as needed. Pre-defining the items in the menu will help keep the styles consistent.

How to use

Open the Name prefixes setup tool on the Setup panel by clicking on Name prefixes.



Name Setup Options

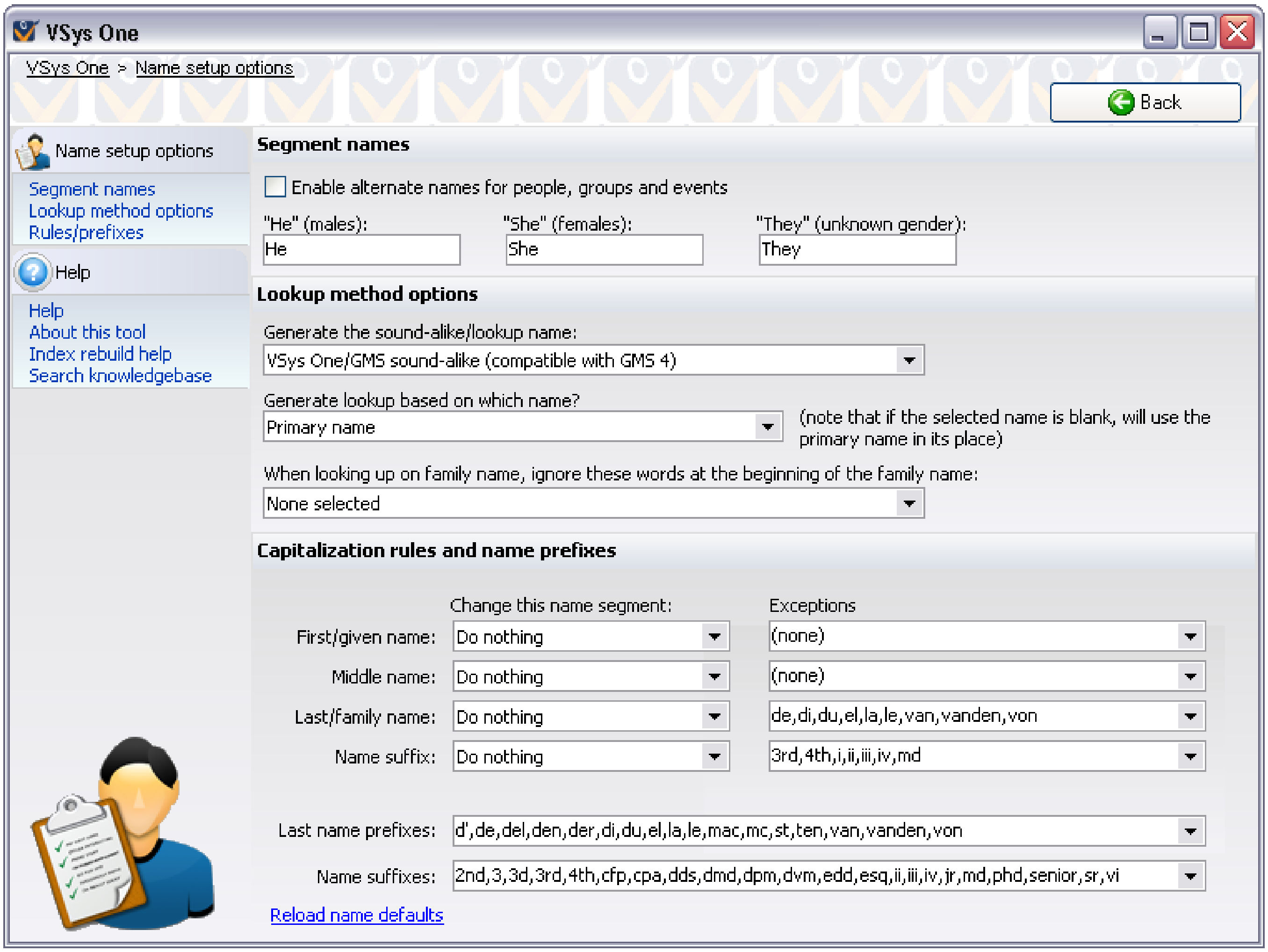
Concepts

GMS 6 gives you tremendous flexibility in how names are assigned to people and how people are looked up by their names. In this section we'll go over:

- how names are named,
- how GMS finds people based on their names, and
- automatic rules for capitalizing names.

How to use

Open the Name Setup Options tool by clicking on the Name setup options link from the Setup panel in the main GMS 6 screen. This brings up current name configuration.



Segment Names

Enabling alternate names gives you a place to enter an "Alternate" name for people and some other things as well. A common use for an alternate name is its use as the name in a different language. You can edit a person's other (non-primary) names by clicking on the Other names link in the profile editor. The alternate and phonetic names are also available in mail merges, most custom reports, and in ***exports*** (page 150).

The fields "HE" (MALES), "SHE" (FEMALES) and "THEY" (UNKNOWN GENDER) affect how the fields HE/SHE/THEY and HE/SHE/THEY (LOWER CASE) work when reporting on people or using them in mail merges. These are particularly useful in mail merges when you are referencing the person, e.g. "He has performed 145 hours of service in the past year." By placing the field HE/SHE/THEY in the letter template, GMS will automatically use the appropriate pronoun.

Lookup Method Options

When GMS 6 looks up people by their name, it searches three ways:

1. People whose family name matches the value you enter.
2. People whose family name begins with the value you enter.
3. People whose family name is similar to the value you enter.

These options affect the last option and how GMS finds those similar names.

Generate the sound-alike/lookup name

This sets the algorithm which GMS uses to compare names to see if they are similar. GMS can use any of three methods here:

GMS 6/GMS SOUND-ALIKE	A proprietary method which is very effective and is GMS 6's default method.
SOUNDEX	The industry-standard Soundex algorithm.
RAW FAMILY/LAST NAME	Uses just the first five bytes of the person's family name. This is normally only used for searching on Japanese, Chinese, Cyrillic, or other names primarily composed of non-Western characters which GMS would not be able to compare for similarity.

Generate lookup based on which name

This tells GMS which one of the three possible names for a person should be used when trying to find similar names. Normally this is left as the primary name, but if you're storing a non-Western name in the primary name field and the Western name in the alternate name fields, this lets you look up people based on similarity of the alternate or phonetic names.

PRIMARY NAME	The person's primary name is used for finding people based on similar names.
SOUNDS LIKE (PHONETIC) NAME	The person's phonetic name is used. If the phonetic name for a person is blank, his/her primary name is used in its place.
ALTERNATE NAME	The person's alternate name is used. If the alternate name for a person is blank, his/her primary name is used in its place.

When looking up on family name, ignore these words at the beginning of the family name

In some cultures family names are commonly prefixed with an honorific, e.g. "el". This honorific is not always present, and so you may have to search for someone once with the honorific in place, then again without it if the first search was not fruitful. This becomes more complicated if more than one prefixed honorific is common. This list will exclude any checked values when searching for name similarity. For example, the family names "el Abdullah" and "Abdullah" would both match a search for "Abdullah" if "el" was checked on this list.

The names present on this list are defined on the Capitalization rules and name prefixes (page 228) panel.

Caution: Changing any of the values on this panel requires running the Rebuild various lookup indices (page 193) tool in the Administrator tools panel afterwards. If you don't, GMS 6 and GMS are not going to be able to properly lookup people already stored.

Capitalization Rules and Name Prefixes

These tools let you configure names or portions of names to be automatically capitalized during the data entry process. For each name segment, "First/given name", "Middle name", "Last/family name" and "Name suffix", you select the capitalization rules and any exceptions to that rule.

DO NOTHING	Leaves the name segment unchanged from how it was entered.
CAPITALIZE FIRST CHARACTER	Capitalizes the first character, makes all other characters lower case.
CAPITALIZE ALL	Capitalizes all characters in the name segment.
MAKE LOWER CASE	Makes all characters in the name segment lower case.

These rules do not apply when people are imported using the Interactive File Importer (page 160) or the General File Importer.

Exceptions

You can define any number (including none) of exceptions to the rule for each name segment. The rules for each word are the same as the rules above with with the addition of "Replace with another value". This replace option is useful for standardization and changes more complex than the other rules permit. For example, you could automatically replace "vanden" with "van den" in the last/family name.

Prefixes and suffixes

Prefix and suffix fields are used as hints when GMS needs to automatically break apart full names. This needs to be done when GMS is presented with a name like "van Jackson, Andrew Lloyd Jr". Most commonly this will happen when importing names, working with the FULL NAME field in custom application forms, or when dealing with older data stored by GMS. If GMS knows that "van" is a common last name prefix, and that "Jr" is a common name suffix, it can successfully break this name apart into its components.

The last name prefixes here are also used in the Lookup method options panel as options for excluding portions of the family name from the name comparison algorithms.

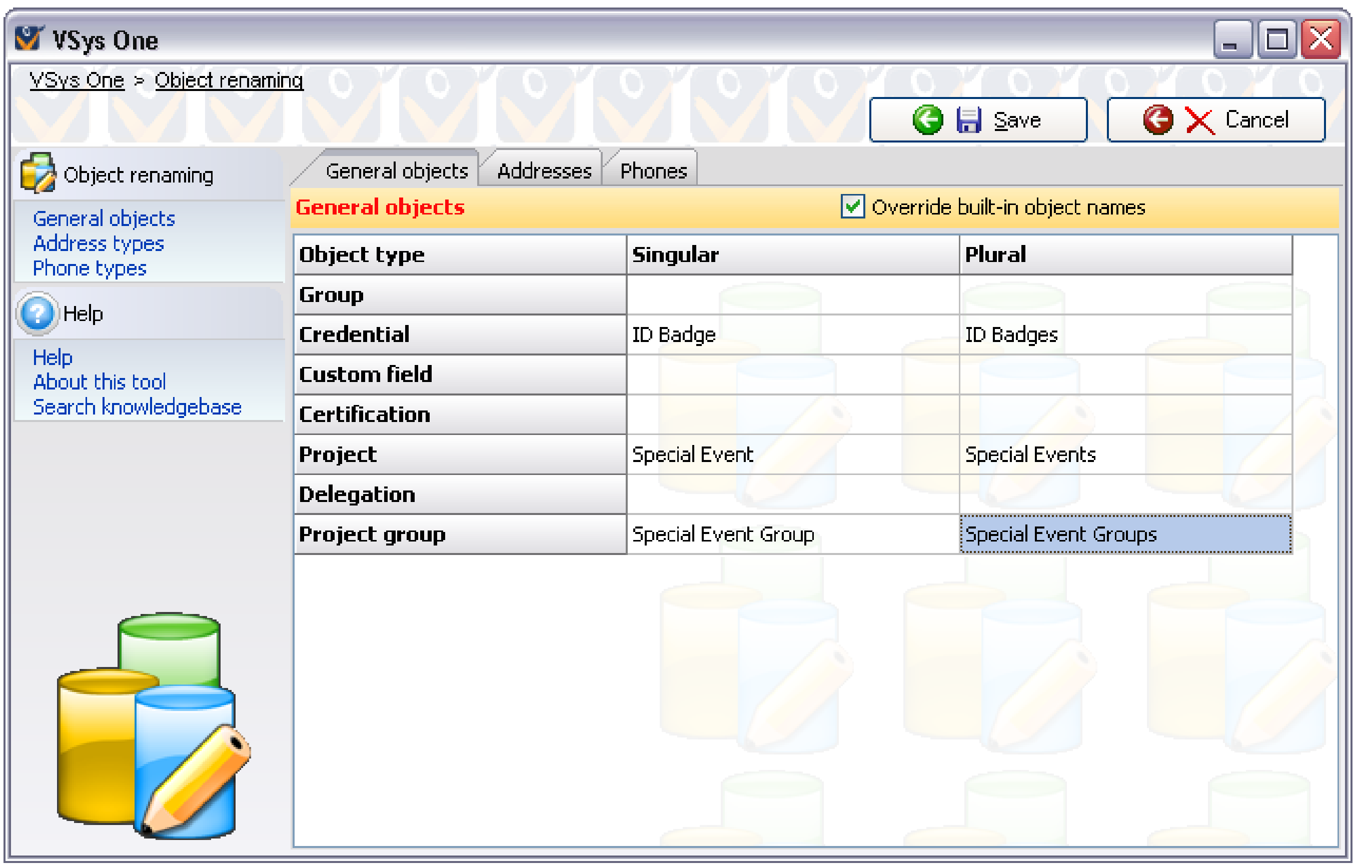
Object Renaming

Concepts

Object renaming lets you tell GMS to call certain things by different names. For example, you can refer to "Games" as "Special events" if that makes more sense to your organization. While you can't define new types of addresses and phone numbers, you can rename existing types by using this tool. It doesn't change how GMS works with them, but it will display them using the terms you specify.

How to use

1. From the main GMS 6 screen, click on the Object renaming link on the Setup panel.



2. Check OVERRIDE BUILT-IN OBJECT NAMES to enable object renaming. Un-check it to disable it.
3. For each type of object that you want to rename, enter both a singular and plural name. For example, if you're renaming "Games" to "Special event", enter "Special event" in the SINGULAR column, and "Special events" in the PLURAL column.
4. To return an object to its original name, just leave the field blank.
5. Do the same on the **Addresses** and **Phones** tabs, providing a new name where applicable, or leaving it blank to use the built-in term.
6. Click on the **Save** button to commit your changes.

After saving your changes, GMS 6 will need to shut down for the changes to take effect.

Caution:	Injudicious use of object renaming can confuse your users, either accidentally or by intent. (Yes, you could rename all objects to "George", and while this would probably be very entertaining, they may hurt you as a result.) Large scale renaming may also slow down the Bespoke technical support when trying to assist with an issue.

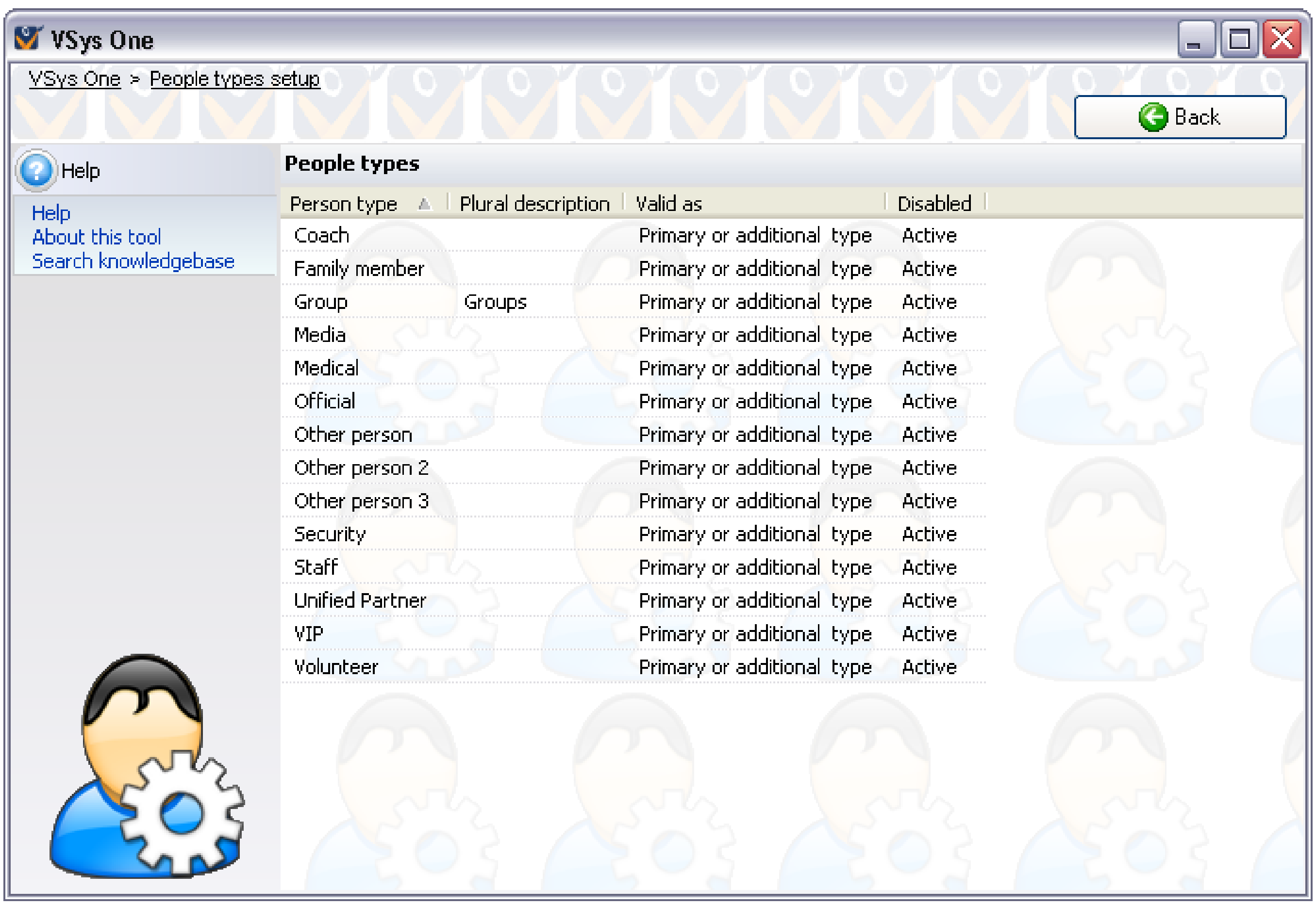
People Types

Concepts

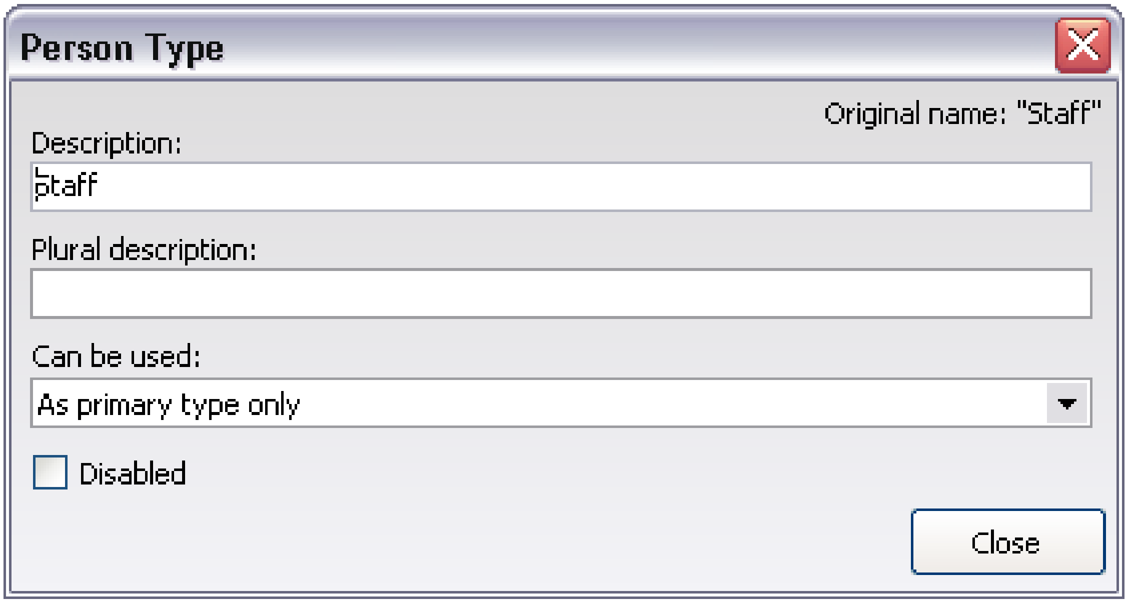
GMS comes with a list of 12 built-in types of people. You can't add new ones here, but you can disable or change the names of existing ones to suit your needs.

How to use

Setup people types by clicking on the People types link from the Setup panel. Click on any person type to change its properties.



Field name	Description
DESCRIPTION	How the person type should be displayed when only one is described, e.g. "1 VIP shown".
PLURAL DESCRIPTION	Used when more than one of this type is displayed, e.g. "14 athletes shown".
CAN BE USED	How this type can be attributed to a person - primary, additional, or both. Changing this value here does not affect the types already assigned to existing people.
DISABLED	Disabling a person type prevents it being assigned to people or used in filters, but does not delete it from people who already have it.



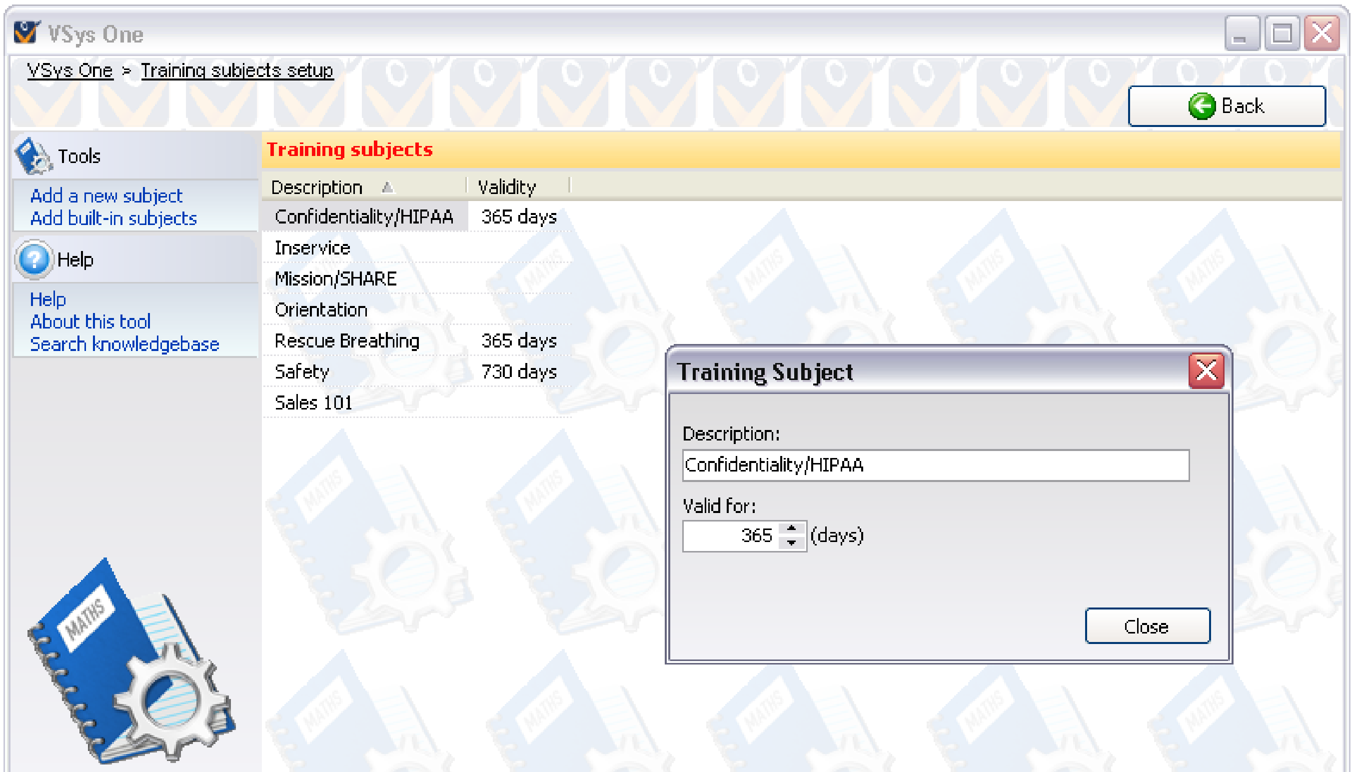
Training

Concepts

Training helps you track what classes your Individuals have take and if you've taught the training or it was done by an outside party. Jobs can have required trainings. This will keep you from assigning someone a job until he's taken the appropriate training. Training is divided into ***training subjects*** (page 232) and ***training courses*** (page 233).

Training Subjects

Training subjects are the basic topics in which your Individuals are educated. Some examples are "Individual orientation", "Data entry", and "Safety protocols". Individual jobs can be set up to require one or more trainings, and the items on those lists are the training subjects. A training subject consists only of a description and length of time that the training subject is valid.



Adding training subjects

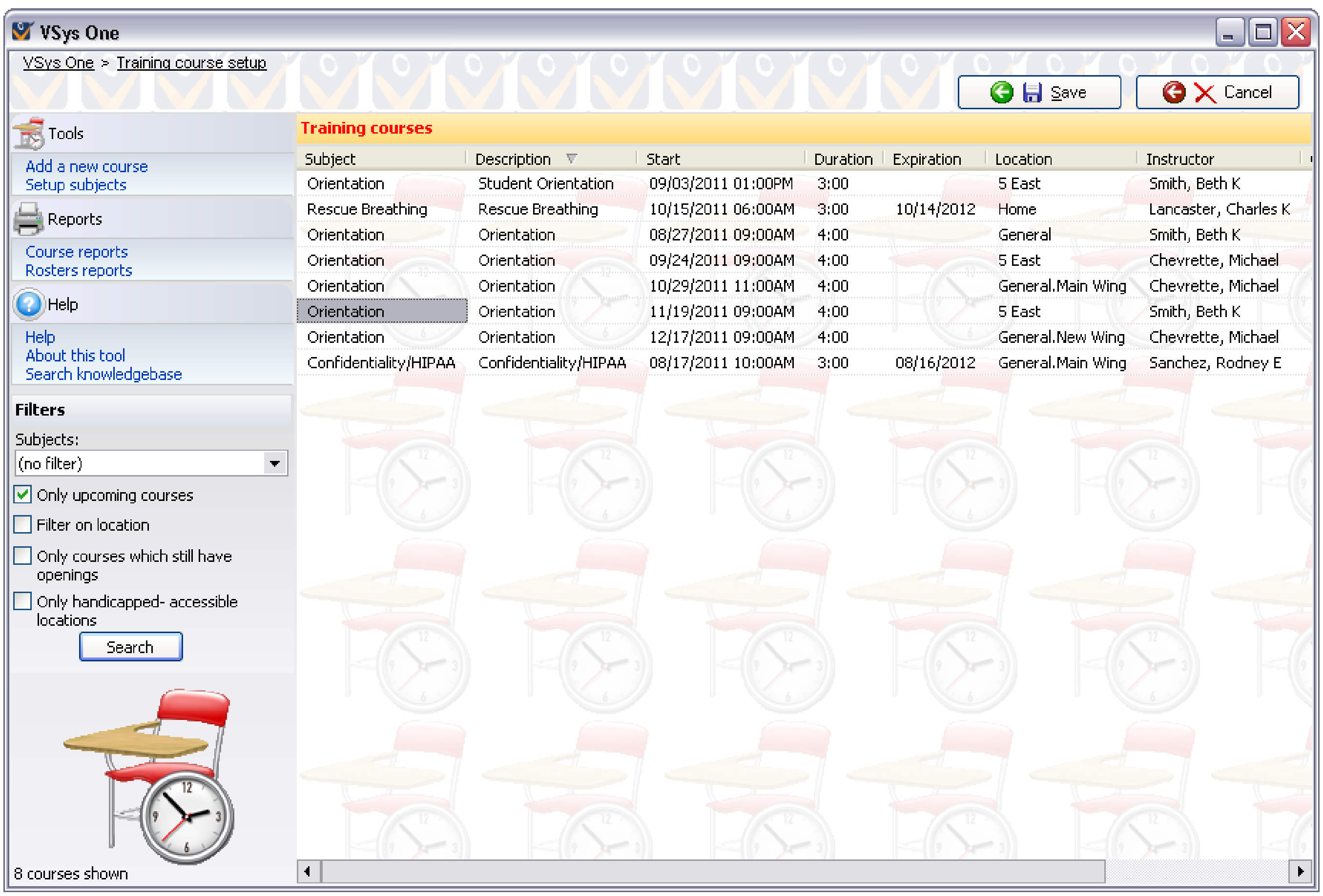
GMS comes with several built-in subjects you can add. To add built-in subjects, click the Add built-in subjects link on the left and GMS will add some sample, built-in subjects. To add a new subject of your own, click the Add a new subject link on the left. Add a DESCRIPTION and how long a training of in this subject is normally valid, then click **Save.**

Merging Training Subjects

You cannot delete a training subject when one or more courses are set up to use that subject. You can, however, merge two training subjects together. Right-click on a training subject and select Merge with another subject. After selecting the target subject, all courses and trainings which refer to the original subject will be changed to the target subject, and the original subject will be deleted.

Training Courses

Courses are the actual classes, e.g. "Individual orientation" at 11am on Saturday the 14th. Click the Add a new course link on the left to add a course. Or right-click on a course to modify it, delete it, or create a new one.



Field name	Description

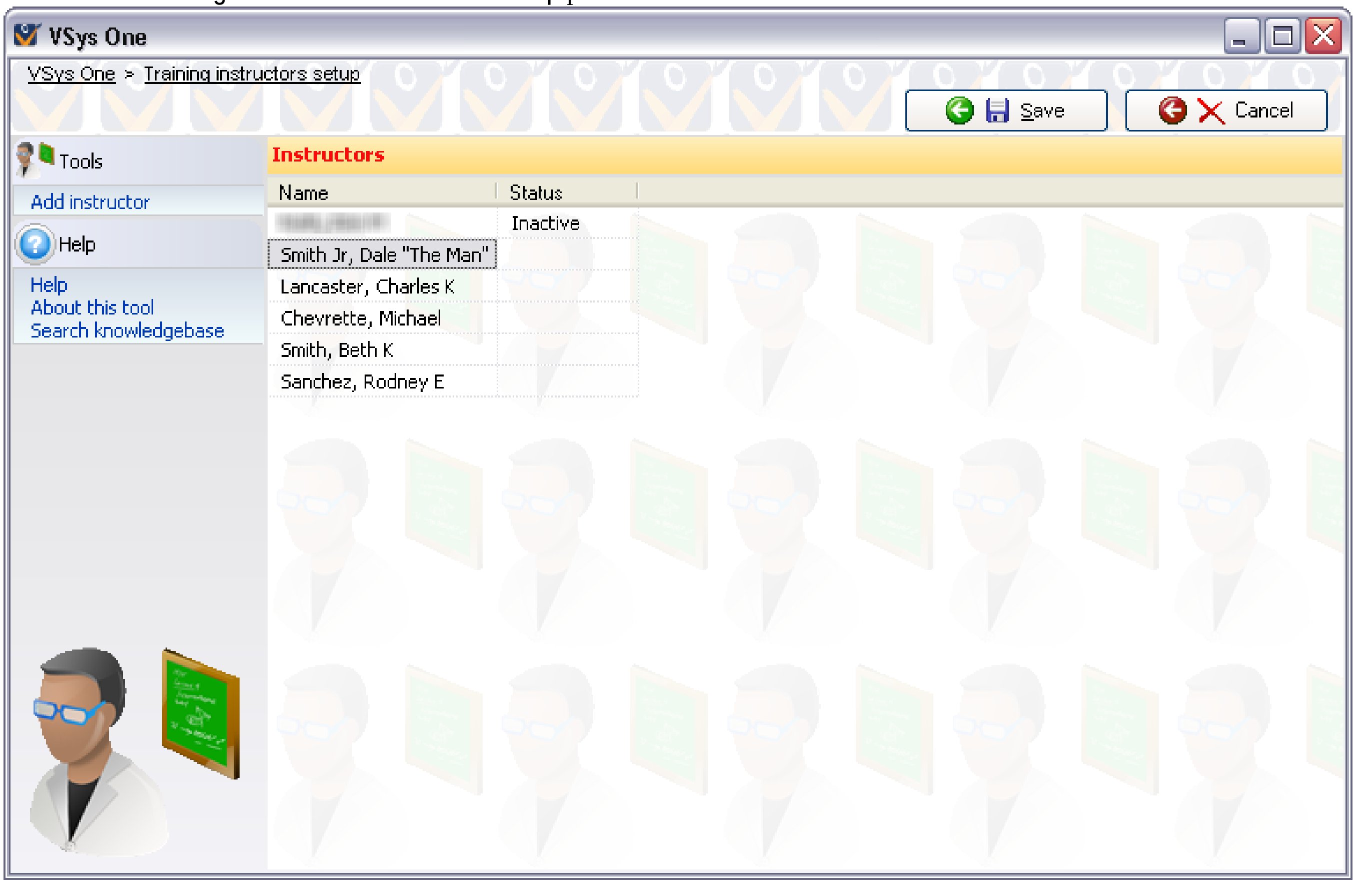
COURSE SUBJECT	What this course teaches. Click the Setup subjects link to set the options here in the Training Subjects (page 232) section of the Setup panel.
DESCRIPTION	This can be any value which adequately describes the course for you. Normally you'd include at least the course subject here.
START DATE	First date that the training takes place.
START TIME	The beginning time for the training.
DURATION	How long the training lasts.
STATUS	Status of the training - Canceled, Confirmed, Pending, Requested, Rescheduled
CREDIT STUDENTS WITH INDIVIDUAL HOURS	Do students receive Individual hours for the time they spend in the training?
HOURS RATIO	If they do receive credit, what percentage of time they receive.
INSTRUCTOR	Select the instructor for the course from the pull-down menu. If the person is not listed choose (add) to search for him. You can pre-configure a listing of instructors under Training Instructors in the Setup panel.
PRIMARY LOCATION	Where the class is taught. If it's in more than one location, put the most important one here.
CATERING	Text field to make notes about food/beverage for the course.
EXPIRATION DATE	Once the course is expired, those who have taken it no longer qualify for jobs which require that course.
ANONYMOUS ENROLLMENT	Students attending the training for which there are no individuals to enter, either because you don't know who they will be or because they are not regular Individuals.
MIN ENROLLMENT	The minimum number of students for the course to be presented.
MAX ENROLLMENT	The maximum number of students who can take the course at once.
COMMENTS	Other information about this training.

Training Instructors

While you can assign new training instructors while defining a ***training course*** (page 233), it's faster to have all of your trainers pre-defined. By marking a trainer as inactive, GMS will show that trainer at the bottom of selection lists, making it easier to quickly choose the trainer(s) you need.

Setting up training instructors

1. Click on the Training instructors link from the Setup panel.



2. Add new trainers by clicking on the Add instructor link and then locating the person to use.
3. Remove a trainer by right-clicking on their name and selecting Remove as instructor. Note: this is only available for manually-defined instructors, meaning those who are not attached as instructors to any ***training course*** (page 233).
4. Mark a trainer as active or inactive by right-clicking on their name and selecting Make active or Make inactive. This is available for all instructors.
5. Right-click on a trainer to edit them, send letters, or any other actions normally associated with a person.
6. Click the **Save** button to commit your changes. Note: changes you've made by editing the instructors themselves were committed immediately.

GMS Security

Concepts

GMS security is designed to allow you to limit the actions that users are allowed to perform. It also affects tracing, if it's enabled. When you use GMS security, actions which are logged in tracing include the user ID of the person who made the change.

Users are people, too.

In GMS 6, your users start as regular people in your database, but they are given additional login IDs, passwords and security rights. You'll often create a separate group for your users, but this is not required.

Superusers

Superusers are a special type of user, one who has a complete security bypass. You must have at least one administrator who's a superuser to enable or disable security.

Hidden tools

Most tools that users don't have access to due to their security rights are hidden from view or disabled. Whole panels may disappear from view, menu options become invisible or disabled, and editors open in read-only mode even when you're trying to edit.

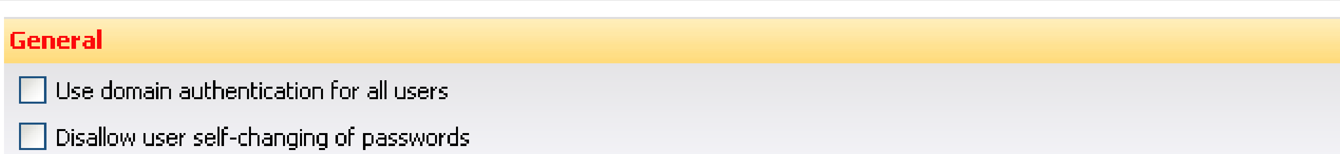
Security Notes

- If you change the security rights for someone who's currently logged in, he won't notice the change and gain or lose any rights until he logs out or clicks on one of the Reload security links.
- Turning security on or off does not affect any users currently logged in until they exit GMS.
- GMS stores each user's user ID in the "Soc sec#" field, not normally available in GMS. (The name of this field is for backwards-compatibility purposes, GMS never stores a Social Security Number in this field.)
- You can never view a person's password, no matter what your security rights. GMS doesn't store the password - it only stores a "hash" of it, which it uses to verify that the correct password is provided when the user logs in.
- If GMS security is not enabled, all users are unrestricted in their actions, including editing security. This is by design. It's important to create your user accounts early in the process and enable security in order to keep your users from accessing features you don't want them to access.
- Even if you're logged in as a superuser, opening any of the security management tools will require that you re-authenticate with your password. In addition, even from within the ***Security Manager*** (page 242), enabling or disabling security requires that you re-authenticate again.

Security Options

Located on the Administrator Tools panel, Security Options define general security implementation rules in GMS such as self-changing of passwords, ***account lockouts*** (page 237), ***password requirements*** (page 238), etc.

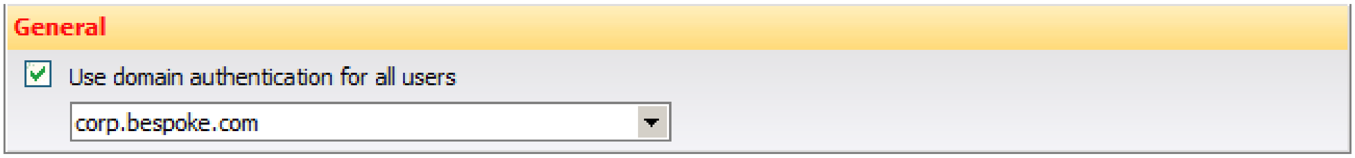
Security Options, General



USE DOMAIN AUTHENTICATION FOR ALL USERS — If checked, GMS will pair users with Active Directory accounts. Checking this option hides the Password requirements and Password expiration and re-use panels since they're no longer relevant. GMS will do all authentication via the person's AD password.

DISALLOW SELF-CHANGING OF PASSWORDS — If checked, users cannot change their own passwords at any time other than when their password is expired.

Domain Authentication

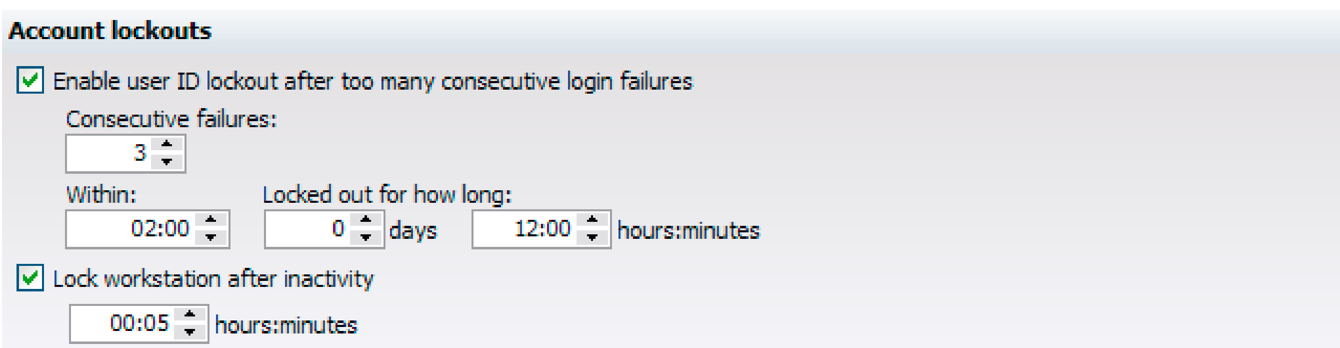


Notes

- With domain authentication enabled, GMS no longer stores each user's password, and instead authenticates that user against your domain when they're required to log in.
- All computers using GMS must be on your domain for the people using them to be able to log in.
- Removing a user from the domain, or disabling their account, effectively locks them out of GMS as well.
- Only a single domain is supported for each GMS 6 installation.

Account Lockouts

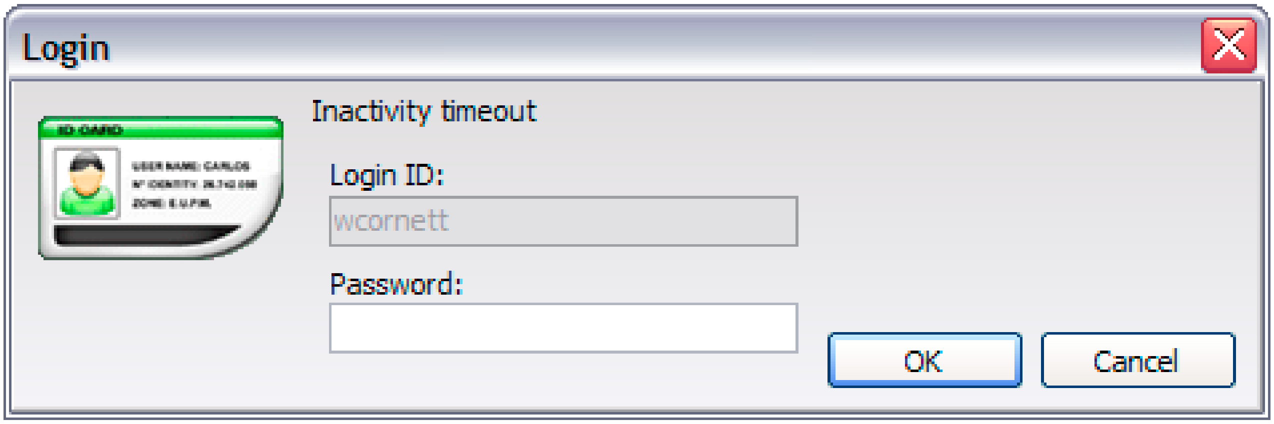
When enabled, GMS can lock itself with too many failed login attempts or when it's logged in but unattended.



ENABLE USER ID LOCKOUT... — If enabled, and the user has attempted this number of consecutive failures during the specified time period, GMS will lock out their account for the given number of days, hours, and minutes. This lock can be removed by right-clicking on their name in the Security Manager and resetting the lockout.

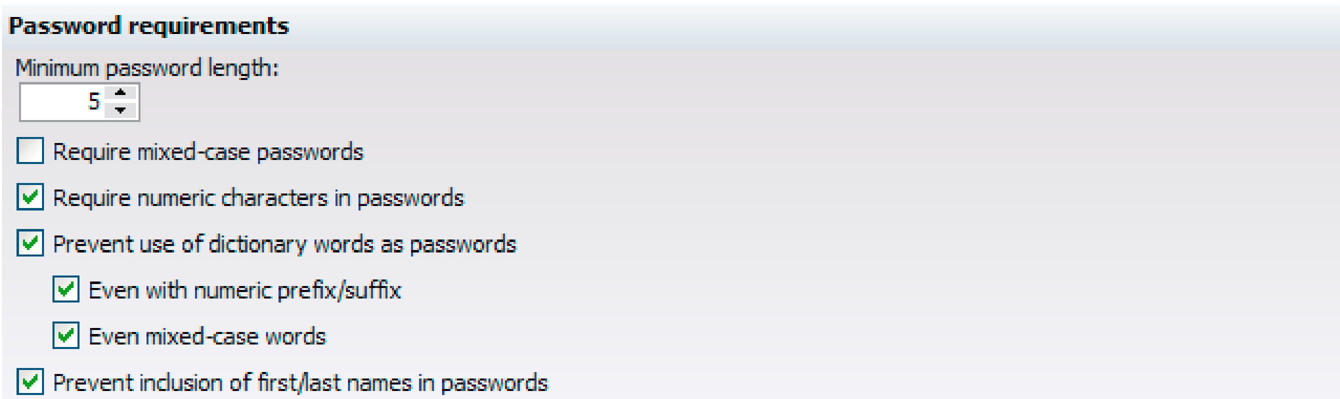
Any successful login clears this failure count, although each and every failed attempt remains logged in this user's history.

LOCK WORKSTATION AFTER INACTIVITY — A user who goes this period of time without activity in GMS itself will be locked out and required to re-authenticate. A failure to do so clears the machine for access only in order to shut down GMS.



Password Requirements

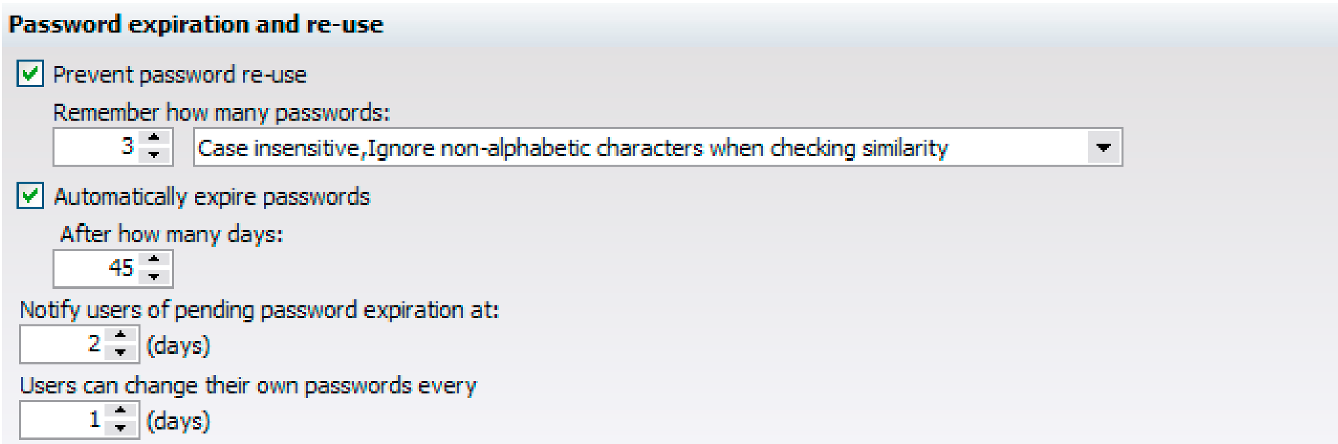
These options enforce complexity on user passwords. (Not applicable if ***domain authentication*** (page 237) is enabled.)



MINIMUM PASSWORD LENGTH	Any password must have at least this many characters.
REQUIRE MIXED-CASE PASSWORDS	Every password must have at least one lower-case and one upper-case alphabetic character.
REQUIRE NUMERIC CHARACTERS...	Every password must have at least one numeric digit.
PREVENT USE OF DICTIONARY WORDS..	Passwords may not contain any of the words in the current spell check dictionary. Unless EVEN WITH NUMERIC... is checked, numeric prefixes/suffixes on a dictionary word bypass this rule. Unless EVEN MIXED-CASE WORDS is checked, mixing the case of the characters in the word bypasses this.
PREVENT INCLUSION OF FIRST/LAST NAMES...	Disallows the user's first and last names from his passwords.

Password Expiration and Re-use

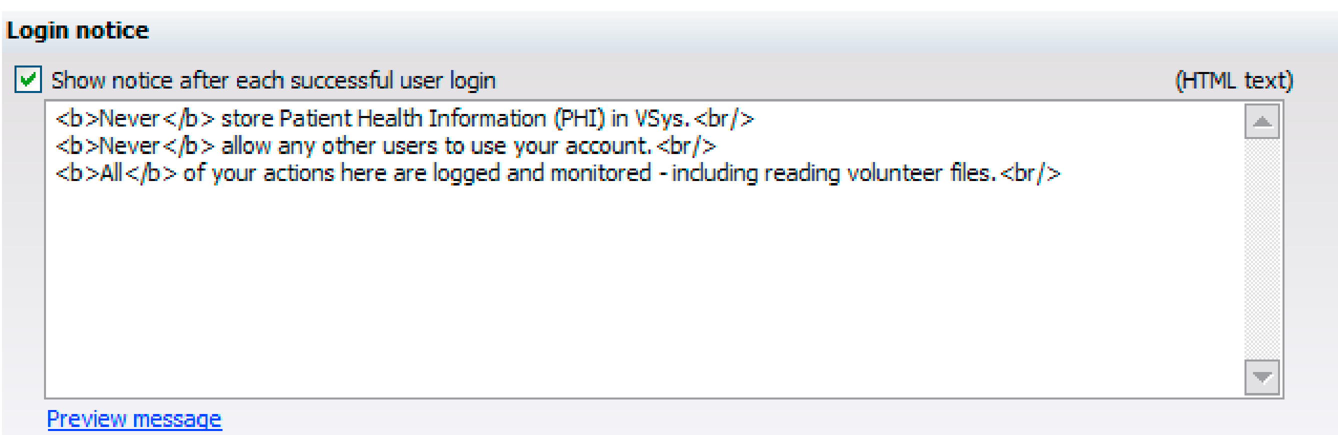
These options prevent users from re-using old passwords, and automatically expire current passwords. (Not applicable if ***domain authentication*** (page 237) is enabled.)



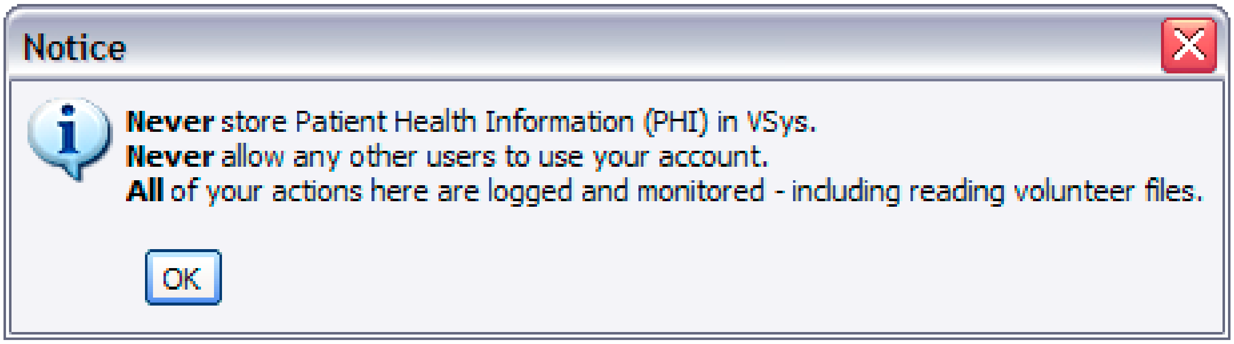
PREVENT PASSWORD RE-USE	Defines the rules for how many previous passwords are retained for historical purposes, and the rules for matching them. Note: since GMS does not ever know a user's password, only the hash of it, changing the matching rules may only be effective for newly-entered passwords, not existing ones.
AUTOMATICALLY EXPIRE PASSWORDS	After a password is changed, it will expire in this many days. Within the Security Manager (page 242), individual users' passwords can be set to expire immediately.
NOTIFY USERS OF PENDING PASSWORD EXPIRATION AT	At this many days before their password is set to expire, users will be notified at every login.
USERS CAN CHANGE THEIR OWN PASSWORDS EVERY	If ***password self-update*** (page 240) is enabled, after a user changes his password, he will have to wait this many days before changing it again. This option is commonly used to prevent users from bypassing re-use rules by repeatedly changing their password in order to overflow the remembered list of password hashes.

Login Notice

This notice, if defined, will be shown to all users immediately after they sign into GMS.



Enter the message as HTML text. Click on the Preview message link to see how it will appear to your users.

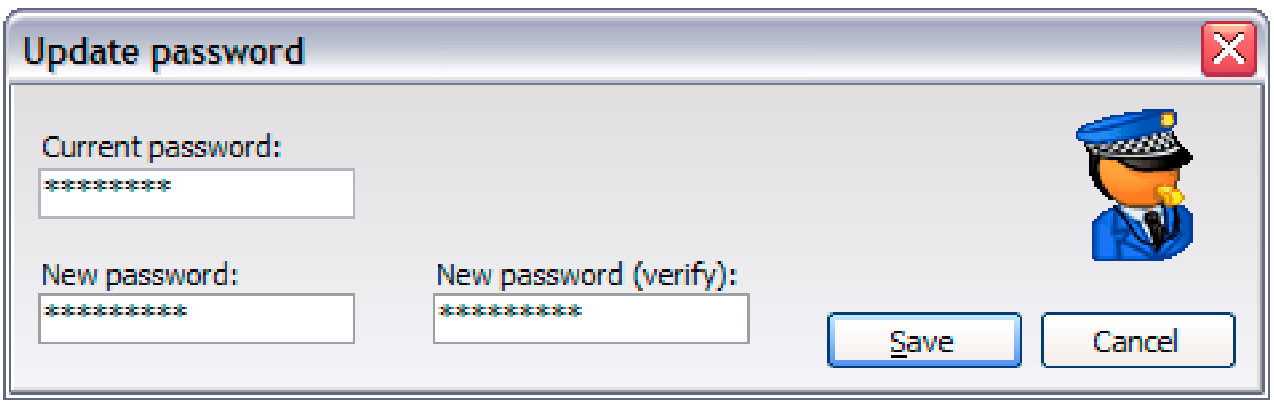


Password Self-Changing

GMS allows your users to change their own passwords once they're logged in. Password self-update is enabled by default and users can change their password from anywhere in the program. If you want to turn off this option, choose Disallow user self-changing of passwords in the Security Options area of the the Administrator Tools panel.

In the navigation bar, GMS always shows who's logged in.

Clicking on the change password link requires that they re-authenticate with their current password, then enter a new one, in duplicate, which conforms to the current password rules.



When the user logs in, if their password is expired, they'll be prompted and required to update it in order to continue.

User Security Concepts

Inheritance

In addition to their own, assigned rights, users can also inherit rights from other people. If you have many people who should have the same or similar access rights, it's a common practice to define one user who has the basic rights, then allow other users to inherit rights from that "template" user. Use templates to create user roles by making and naming a security user with the appropriate privileges.

Notes about inheritance:

1. Rights are cumulative: a user has all of the rights of the user he inherits from plus his own rights. You can't subtract rights that have been inherited.
2. A user inherits rights directly, never indirectly. For example, if Mary inherits rights from George, and George inherits his from Jane, Mary has her rights plus those of George, not those from Jane.
3. Users can only inherit rights from "enabled" users.

External security

Security restrictions in GMS tells *GMS* not to perform certain operations. *Information in your database is not necessarily encrypted or protected from other applications.* If your data is stored in SQL Server, for example, users with access to SQL Server Enterprise Manager can access the tables directly, completely bypassing GMS security.

Security indicators

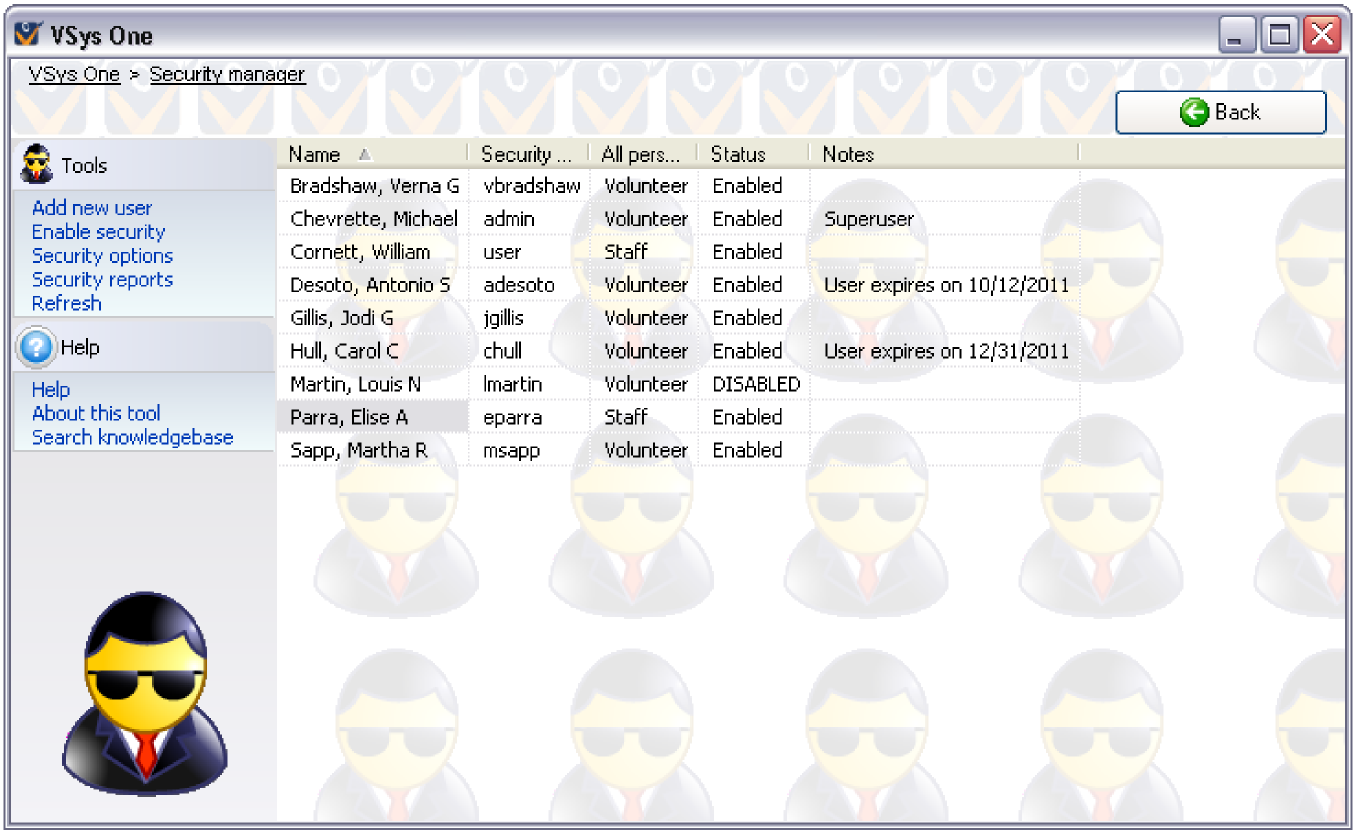
When you're logged into GMS, at the top of the screen you'll see a note saying "You are logged in as xxx". If you're a superuser, you'll see a secret agent icon up there as well:

For other users, if there is a portrait picture in their personal profile, that image will appear.

If you're logged in as a superuser, you probably should not walk away from your machine when another user may get physical access to your machine. He cannot elevate his own access rights by using your machine to access the ***Security Manager*** (page 242), because GMS will require you to re-authenticate before launching any of the security-related tools. But he would still have access to many functions and his actions would be logged *under your name*.

Security Manager

The Security Manager is a list of all of the people in your system who are designated as GMS users. Open it by clicking on the Security manager link from the Administrator tools panel on the main GMS 6 screen. Users here may be enabled or disabled. A disabled user loses none of his settings or rights, but cannot log in until he's re-enabled.



Adding a new user

1. Click on the Add new user link on the left hand side.
2. Use the person lookup tool to find the user as an existing person, or create a new person, as appropriate. Clicking on the person's name will select him.
   If a person is already on the list of users, the person lookup tool will not show that person even if you enter his information.
3. Enter a USER ID and PASSWORD, then the same password again in the VERIFY PASSWORD field. To have GMS automatically assign a random password, click on the Assign a random password link.
4. Check the Enabled box to allow this user to log in.
5. Assign general security rights, inheritances, and Games-specific rights.
6. Click the **Save** button to return to Security Manager.

Tip: You can't have more than one user with the same user ID. If you try to make one, GMS will prevent you. If you manage to import one using the Interactive File Importer or other tools, neither of the people with that user ID will be able to log in.

Tools

These show on the left side of the screen

Add new user	Opens up the standard person lookup tool. Use this to find an existing person and make him a user. (You can also create brand-new people here.)
Disable security/Enable security	Turns GMS security on or off. Clicking on this brings up a login dialog - you must log in here as a superuser in order to change security's status.

Security options	Opens the Security options (page 236) tool for defining password, inactivity timeout and other rules.
Security reports	Reports to list current users and their rights.
Refresh	Reloads security users from the database.

On the right-click menu

Right-click on a list to modify a person's security settings or perform other actions.

Add a new user	Opens up the standard person lookup tool. Use this to find an existing person and make him a user. (You can also create brand-new people here.)
View personal data	Opens this person in the Profile Editor in read-only mode.
Edit personal data	Opens this person in the Profile Editor for editing.
Edit security settings and rights	Brings up the Security Rights editor for this person, where you can edit user ID, password, and security rights.
See changes to this user	Lists who's made changes to this person and when, lists all login/logout details for the user.
See what this user has done	Lists all actions taken by this person, including people updated, reports printed, logging in/out, etc.
Check password	Prompts you for the person's password, then tells you if it was correct or not. Note: you can never see any person's password, ever, though you can change it.
Enable/Disable	Enables or disables the person's login rights.
Make this person a non-user	This removes the person as a user, revoking all access rights and clearing the user ID. You can't undo this action once you've confirmed your intention at the prompt except by re-entering all of that data again.
Reset login failure timer	If this person is locked out due to too many failed login attempts, resets the timer for that and allows him to log in again.
Print a report for this person	Prints any of several built-in security reports detailing this user's personal information, security rights and audit log.

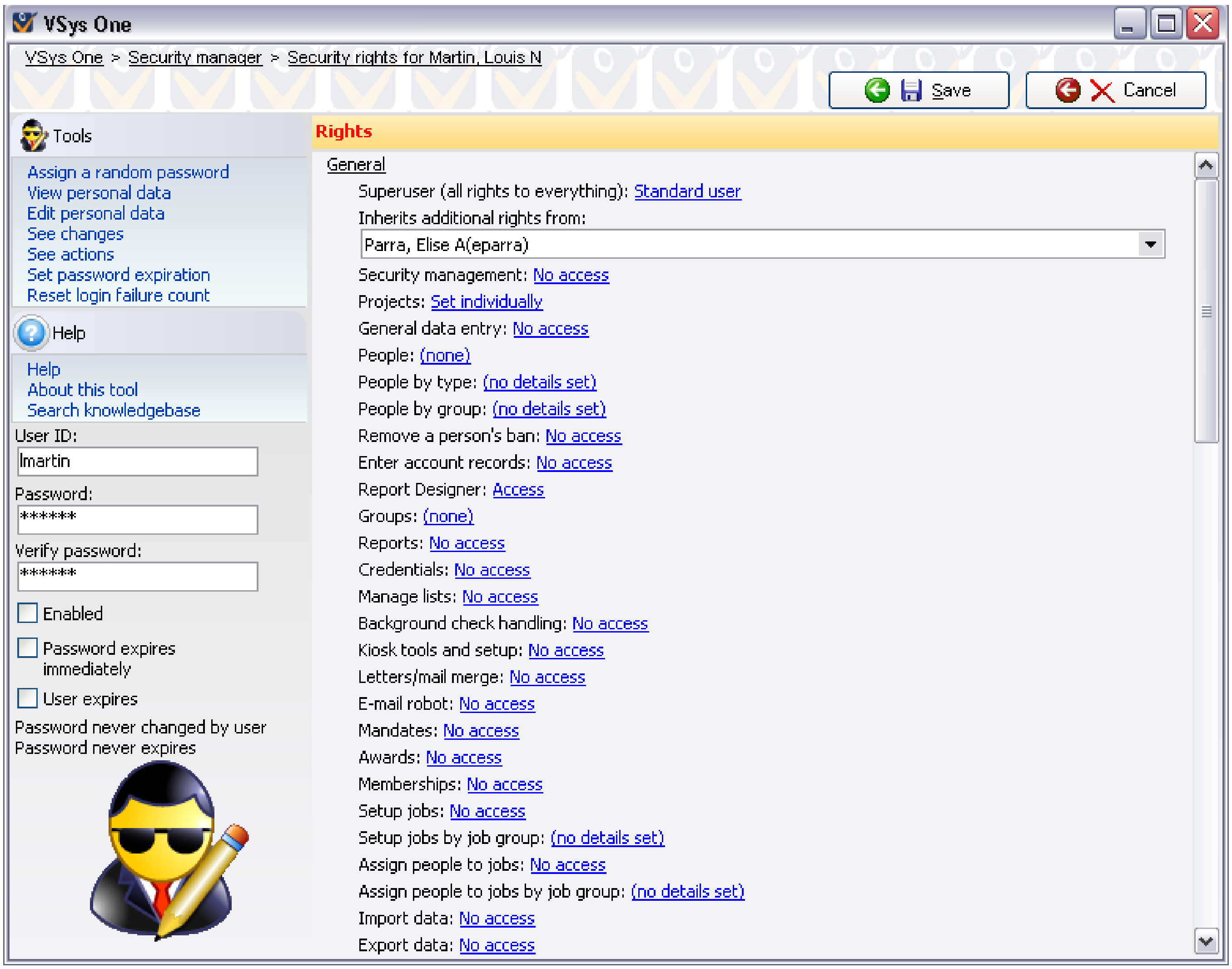
User Security Rights

Tools

Assign a random password	Creates a new, random password based on the current password complexity rules, assigns it to this user, and displays it for you.
View personal data	Opens this person in the profile editor in read-only mode.
Edit personal data	Opens this person in the profile editor for editing.
See changes	Lists who's made changes to this person and when, lists all login/logout details for the user.
See actions	Lists all actions taken by this person, including people updated, reports printed, logging in/out, etc.
Set password expiration	Prompts for an expiration date for the person's password.
Reset login failure count	If this person is ***locked out due to too many failed login attempts*** (page 237), resets the timer for that and allows him to log in again.

On the left hand side of a user's information, set their password, expiration and other properties.

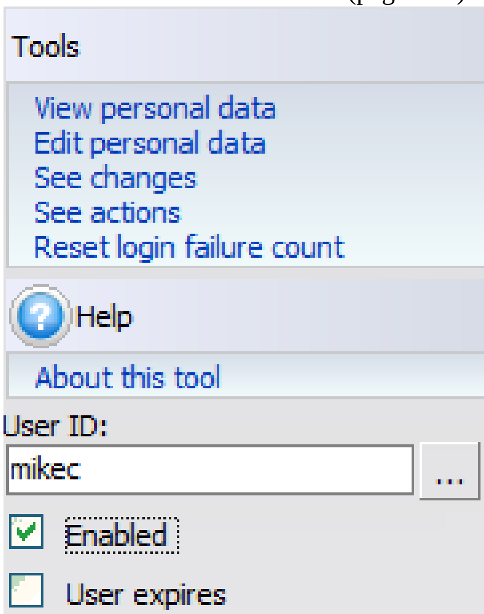
Field name	Description
USER ID	A unique ID that the user will use to log into GMS. It must be at least three characters long and may only have in it the characters a..z and 0..9. GMS will force it to be lower-case.
PASSWORD	Must be at least three characters long.
VERIFY PASSWORD	Type the same password again to verify that it's being typed correctly.
ENABLED	When checked, the user can log in.
PASSWORD EXPIRES IMMEDIATELY	Requires the user to change his password next time he logs in.
USER EXPIRES	If checked, sets an expiration date for this person as a user. After this date, the user will no longer be able to log in.



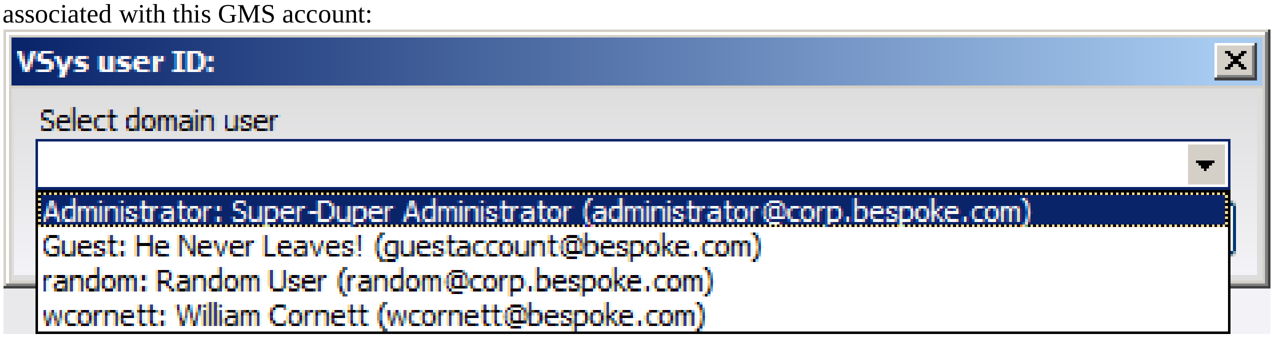
If the user ID is invalid or conflicts with another user, or the passwords don't match or are invalid, GMS will show an error and won't allow any of the data to be saved.

Domain authentication notes

Note: if ***domain authentication*** (page 237) is enabled, some of the options here are reduced:



- All password references are removed
- You get a "..." button to link the GMS user to their Active Directory account. Use that button to choose the AD user to be associated with this GMS account:



General Rights

These rights apply globally, that is, outside of a Games.

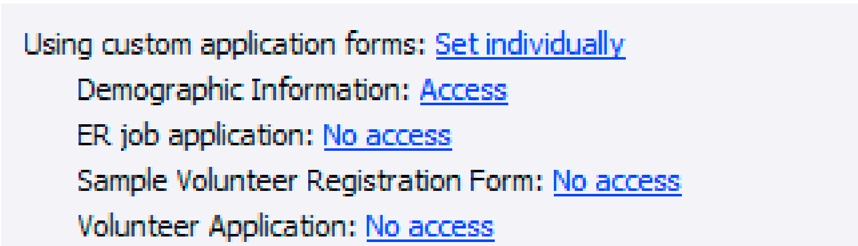
Right	Description
SUPERUSER	A superuser has all rights to everything in GMS, effectively bypassing security altogether. A "Standard user" must be assigned specific rights to be able to perform any actions.
INHERIT ADDITIONAL RIGHTS FROM	Checking any other users' names here gives this user the rights he's specifically assigned plus all of the rights of these other users. The rights are not copied from the other users right away, and changes made to the source users affect this person the next time he logs in.
SECURITY MANAGEMENT	If granted "Access", this user can access the Security Manager and make changes.

GAMES	ACCESS TO ALL/SET INDIVIDUALLY	If "Access to all", user has full rights to all existing Games. Otherwise the user has only those rights given to individual Games.
	CREATE NEW	Allows creation of new Games. Note: newly-created Games default to having the creator as an owner, and that owner has full rights to the Games in the process.
GENERAL DATA ENTRY	Credit Individual hours, mark bad phone numbers/e-mail addresses, edit groups, enter training results, bad e-mail handler.	
PEOPLE	Create: create a new person from scratch. Edit: open an existing person (globally) and modify her data. View: open an existing person (globally) to view her data. Delete: remove someone globally from the system. Registration: Required to register someone into a Games. Rights to people are the sum of the user's rights via PEOPLE, PEOPLE BY TYPE and PEOPLE BY GROUP, with rights determined dynamically based on the types and groups of the person in question.	
REMOVE A PERSON'S BAN	This right is required to un-ban a banned Individual.	
REPORT DESIGNER	Limits access to the Report designer	
GROUPS	Create: create a new group from scratch. Edit: modify a group's properties. View: open an existing group's properties to view them. Delete: remove a group without affecting the people within it. Note: rights to groups do not imply rights to the people within them.	
REPORTS	All types of reports.	
CREDENTIALS	Print name tags/credentials.	
MANAGE LISTS	Create, edit and delete lists globally.	
BACKGROUND CHECK HANDLING	All of the items on the Applicant screening panel plus the ability to edit and create interview records in the Profile Editor.	
IMPORT DATA	The Interactive File Importer (page 160).	
EXPORT DATA	Basic exporter and Advanced exporter tools.	
BULK ENTRANT VALUE UPDATER	Access to this tool globally. Note: if a user has access to the Bulk entrant value updater (page 153), what he does with that tool is not restricted by his security rights.	
BACKUP DATA	Back up this database. Note: any user can run backups from the database selector tool at startup if it's visible, since GMS Security is not enabled by that point.	
SETUP	Design custom application forms, define ***custom fields*** (page 213), ***system preferences*** (page 199), skills, ***locations*** (page 223), job preferences, jobs and job groups, ***contact flags*** (page 212), Individual types, Individual sources, special requests/needs, custom sports, Games groups, ***training courses*** (page 233), letter types, interview types, interviewers, ***name setup options*** (page 227), ***certification*** (page 29) defaults, placeholder people naming, ***object renaming*** (page 229), background check/certification hints, setup databases.	
ENCRYPTION SETUP	Create/manage ***encryption keys*** (page 184). This right should not be given to most users!	
DATA MAINTENANCE	***Rebuild lookup indices*** (page 193), check for ***duplicated IDs*** (page 179), ***purge old trace records*** (page 191), check for ***zip/postal code updates*** (page 182), etc.	
AUTO UPDATE	Access to the auto-update tool. Note that you can also disable this with the `NoAutoUpdate=1` value in the `General` section of the `GMS.ini` file.	

There's no access right for "Restore data", because it's not possible. When it comes time to restore data, GMS can't read the database in order to check the user's security rights. To prevent someone from restoring to your database, either prevent them from deleting tables (Oracle and SQL Server only), or put the value `NoRestore=1` into the database's section in the `GMS.ini` file.

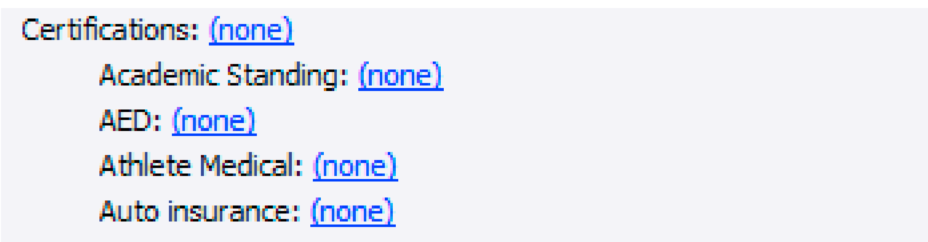
Custom Application Forms Rights

These rights are for data entry using pre-existing custom application forms. For Games which have one or more custom application forms defined within them, you can give the user rights to data entry for all of these applications (assign "Set individually" to USING CUSTOM APPLICATION FORMS) or assign rights to individual applications.



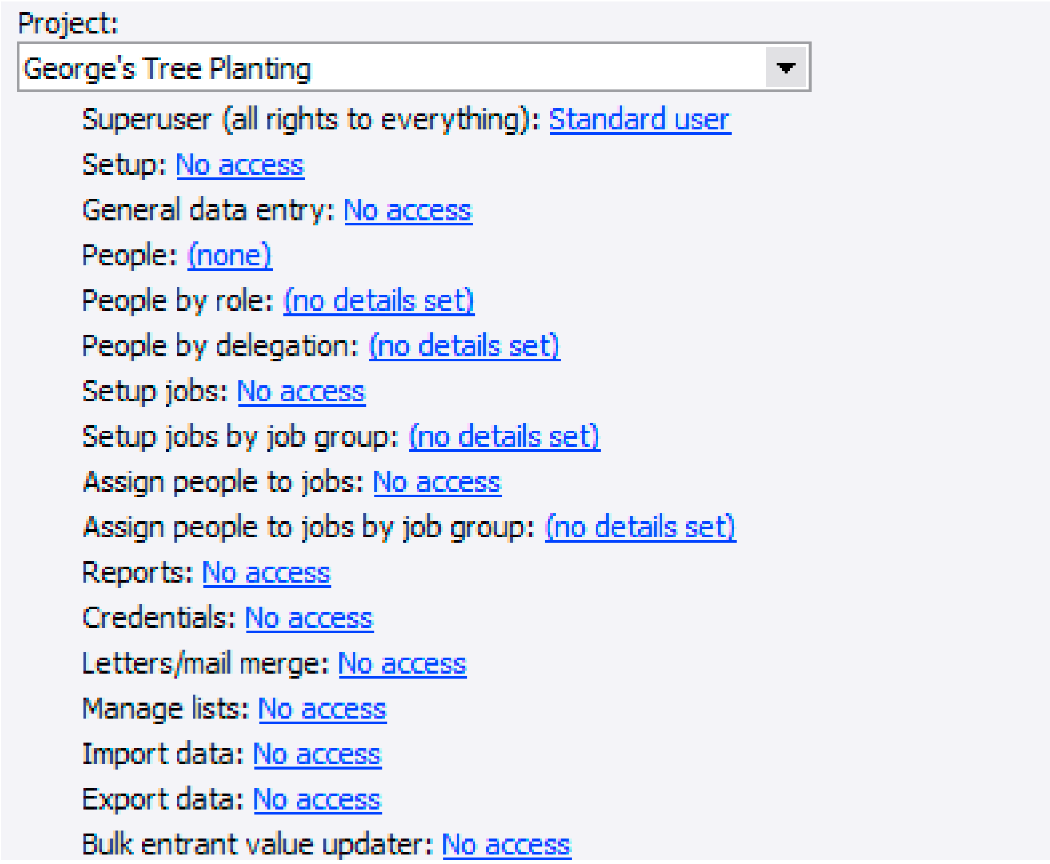
Certifications

You can give the user rights to certifications by giving them rights to all certifications, and/or giving them rights to the individual certification types, with the the user getting the sum of the two. For example, giving him "View" to all certifications and "Create" to "Background results" lets him view any certification type and create new "Background results" certifications. The user can only perform actions for which he has rights with one exception: if he has "Edit" rights, he can also view the certification.



Games Rights

Users without global "Access to all" for Games can be given rights to individual Games. Select a Games from the list. This brings up the user's rights to that specific Games.



Right	Description
SUPERUSER	As "Superuser" for a Games, user has full rights to the Games. A "Standard user" has only those rights set below.
SETUP	***Games setup*** (page 42), design custom applications in Games, ***location manager*** (page 223), setup jobs, job groups and slots, ***add/delete delegations*** (page 50).
GENERAL DATA ENTRY	Credit Individual hours, bad e-mail handler
PEOPLE	Create: add a person to the Games. Cannot create a new person from scratch without global people create rights. Edit: open a person already in the Games and modify her data. View: open a person already in the Games to view her data. Delete: remove someone from the Games. Rights to people are the sum of the user's rights via PEOPLE, PEOPLE BY ROLE and PEOPLE BY DELEGATION, with rights determined dynamically based on the role and delegation of the person in question.
SETUP EVENTS SETUP SPORTS BY SPORT GROUP	Access to Sport/event definitions and setting up events. A user's rights here are the sum of his rights to setup events in general and the Sport group in question.
REPORTS	All types of reports in this Games.
CREDENTIALS	Print ***name tags/credentials*** (page 168) in this Games.
LETTERS/MAIL MERGE	Use any of the mail merge tools, including mailing labels and the mail merge via export

	file tool.
MANAGE LISTS	Create, edit and delete lists in this Games.
IMPORT DATA	Use the Interactive File Importer (page 160) in this Games.
EXPORT DATA	Basic exporter in this Games.
BULK ENTRANT VALUE UPDATER	Access to this tool globally. Note: if a user has access to the Bulk entrant value updater (page 153), what he does with that tool is not restricted by his security rights.

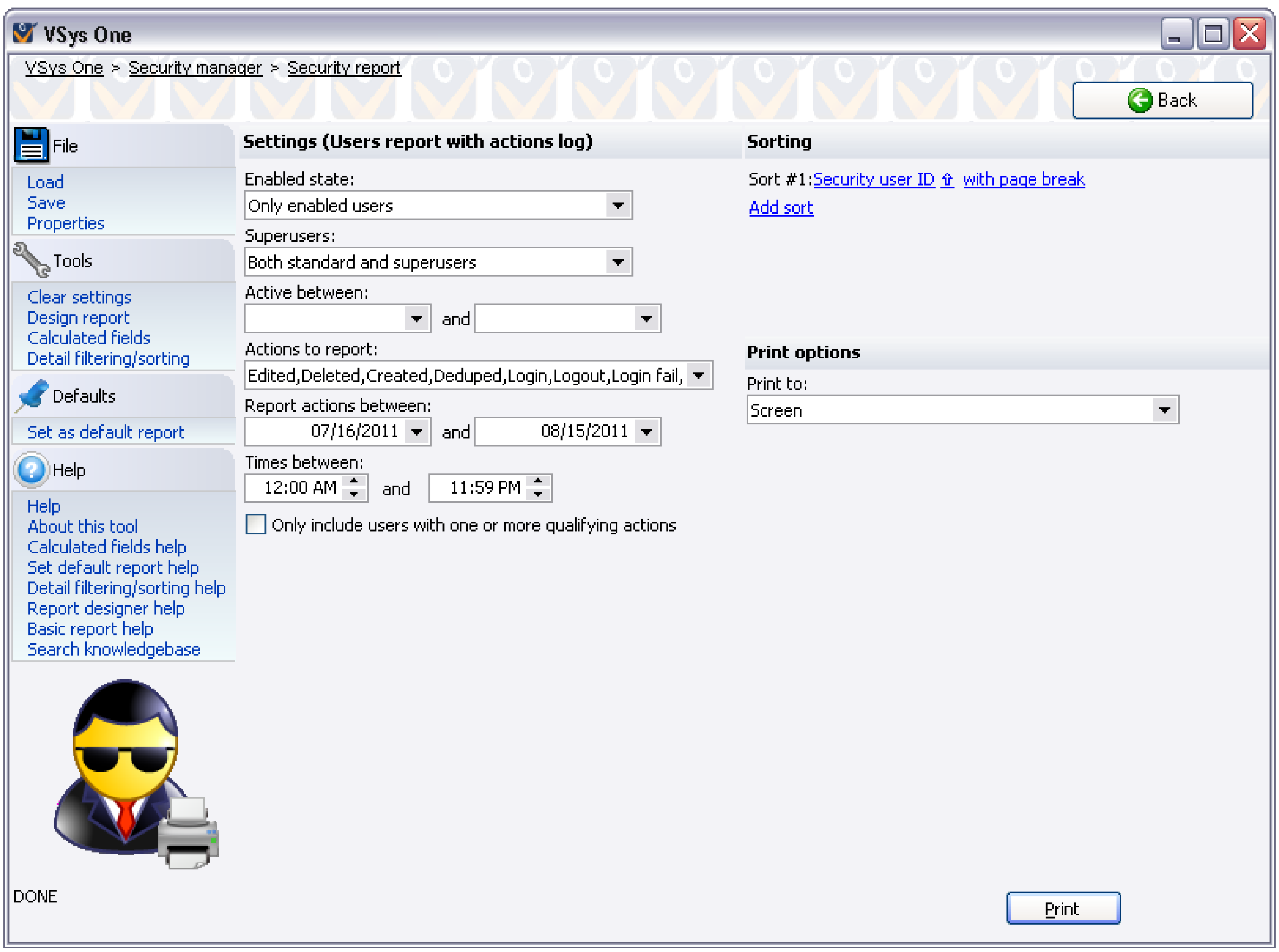
Users who are defined as "Owners" of a Games in the Games's setup automatically have full rights to that Games, regardless of any rights (or lack of rights) set here.

Caution: A user who has rights to the Interactive File Importer (page 160) can bypass all security access rights using that tool - it does not enforce any security rights, so be cautious in assigning this right.

Caution: Custom application forms do not obey any security rights assigned here or globally. Users are, of course, restricted to the fields defined within each custom application form they have entry rights to, unless they are given rights to create new custom application forms or modify existing ones.

Security Reports

Security reports detail the users in your system along with their general security rights.



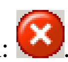
Steps in this task

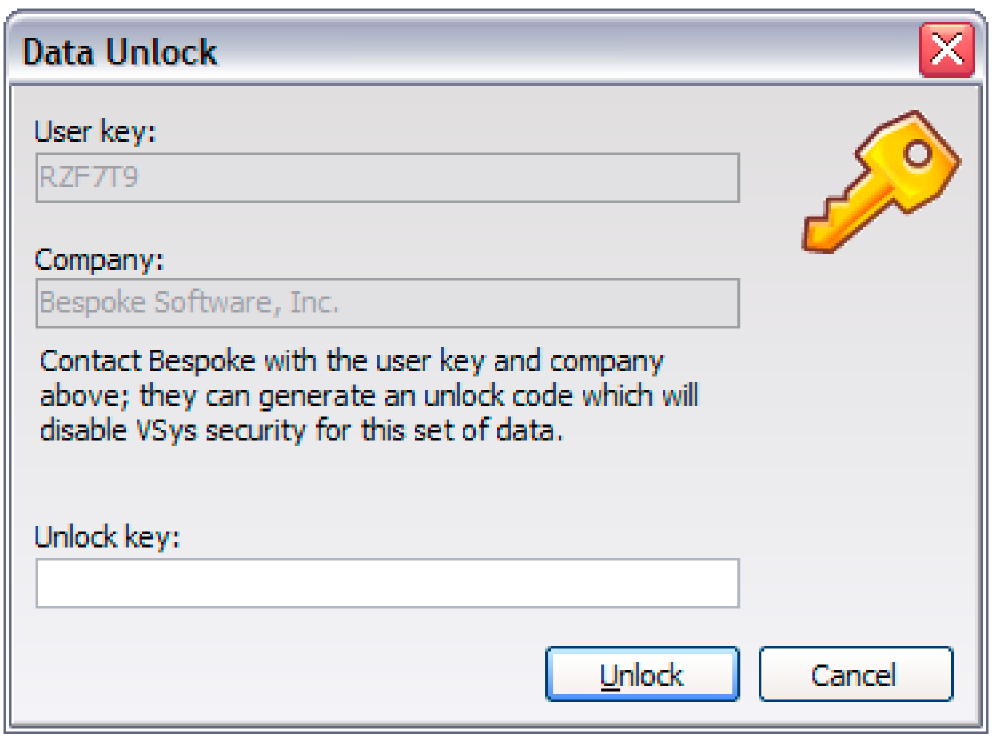
1. From the Security Manager, click on Security reports on the left side of the screen.
2. Set any filters.

ENABLED STATE	Optionally include only users who are enabled or not enabled.
SUPERUSERS	Optionally includes only superusers or non-superusers.
ACTIVE BETWEEN	Any dates set here will limit the users printed to those with logins or any other traced activity during the given time period. These filters are not visible if tracing is not enabled in your data.
ACTIONS TO REPORT	Filter which actions you consider to be relevant.
REPORT ACTIONS BETWEEN	Filters the actions reported in the actions log.
ONLY INCLUDE USERS...	If checked, users who have no qualifying actions according to the above criteria will be excluded from the report.

3. Choose your sort options.
4. Select a target printer, then click the **Print** button.

Security Emergency Bypass

Bespoke technical support can remotely shut down GMS security for you. On the login screen you'll see an icon: . Click this icon to bring up the Data Unlock screen.



With this you can call Bespoke's technical support team and provide the company and user key values. They'll require that you prove you're authorized to shut down security, at which point they will give you a one-time unlock key. Entering this will shut down GMS security to get you access to the Security Manager (page 242) in order to reset user accounts.

Q & A

Is GMS 6 Windows- or web-based?

No. Your staff will use the Windows interface exclusively, as it provides the vast majority of the software's functionality.

What are the hardware requirements?

For workstations, GMS 6 requires Windows 2000, Windows XP, Windows Vista or Windows 7. Each machine must have at least 512MB (1GB for Vista, 2GB for Windows 7) of memory, a display configured for 1024x768 or higher, and should have a 1GHz or faster CPU. These are the minimum requirements. We recommend 1GB (1.5GB for Vista, 2.5GB for Windows 7) of memory. A higher speed CPU will make your experience faster, and a better display lets you show more information on the screen at once, which is especially useful on some of GMS 6's more complex screens.

What are the server requirements?

SQL Server: SQL Server 2000, 2005 or 2008. SQL Server Express will work as well. GMS is not tied to any specific SQL Server versions and is not particularly sensitive to updates to the database. (No applications other than the basic database need to be installed on the server.)

Oracle: Oracle 9i or higher.

GMS does not require its own hardware, or even its own database instance, and will work properly sharing an instance with other applications. Disk space utilized depends entirely on your data, it's a rare database that exceeds 1GB in the first year or two, and the 10GB mark is exceptionally unlikely to be reached.

Do we need the software loaded onto every computer?

GMS can be installed on each workstation, or a network share can be used to allow multiple workstations to work with a common copy. All data is stored in the main database, no information is kept locally. No registry access is required for installation, and if a network share is used for the executable and settings files, installation on additional workstations takes nothing more than adding a shortcut to that networked file.

Can multiple users access GMS 6 at once?

Any number of users can simultaneously access GMS .

Is it possible to customize the system according to our business needs?

There are substantial customization possibilities within the program itself, and we are always open to suggestions on extensions that would be relevant to our customers.

How can we import our existing data?

GMS can import data from a wide variety of sources using the Interactive File Importer (page 160). For IndividualWorks users, we have some internal tools which can be used to bulk import all of your IndividualWorks data for you with minimal hassle on your part.

What language is GMS 6 developed in?

The Windows portion is written in Delphi, which provides all of the GMS 6 business logic.

Is it open source, and can we add or modify existing features?

No aspect of GMS is open source, but the vast majority of it can be customized by ***defining your own fields*** (page 213) and modifying existing ones, creating custom application forms for data entry, and the use of the Interactive File Importer (page 160) for bringing data in from other sources. While you can't modify the underlying programming of GMS, we always get the best feature ideas from our customers. If there's something you're looking for that's not there, tell us, and if we think it would be broadly applicable, it will likely make its way into a future update.

Does the database reside on your server or ours, and who is responsible for maintaining it?

Your primary database sits on your server, in your IT department, where it belongs, and no outside access is ever made to that data by us or our programs.

Is the database encrypted?

Selected aspects (background check requests and results, medical information) of the information in your database can be ***encrypted within GMS*** (page 184). We use a combination of RSA and AES which allows any user on your system to write data into the encrypted records, but only those with the physical decryption key can extract the data.

Shortcuts, Tips and Tricks in GMS 6

Accessing Database Selection and Tools at Startup

If GMS is set up to automatically start with a particular database, the table repair tools and database selector window doesn't come up when GMS starts. If you hold down the left **Ctrl** key on your keyboard for the first few seconds while GMS starts up, it will show that database selector window.

Background Fade Options

You can make the backgrounds behind most lists disappear or be less visible – in the Setup panel, click on System preferences. Change the background fade setting to a higher value to make it less visible, lower to make it stand out more.

Capitalization and Lookups

When looking up people by name, you don't have to capitalize the values you type in. GMS ignores how names are capitalized when it's doing lookups.

Capitalization Rules

Depending on how the primary name fields have been set up by your GMS administrator, you may not have to be concerned with capitalization when entering the person's name. GMS 6 has the ability to automatically convert all lower case or all upper case typing in the name fields to the customary initial capitalization or to apply other capitalization rules determined by your organization. The administrator can also set up the name capitalization rules to recognize common name prefixes that are followed by a second upper case letter in the middle of the name. For example, it can be set up to automatically convert "mcintosh" to "McIntosh".

Comments and Images

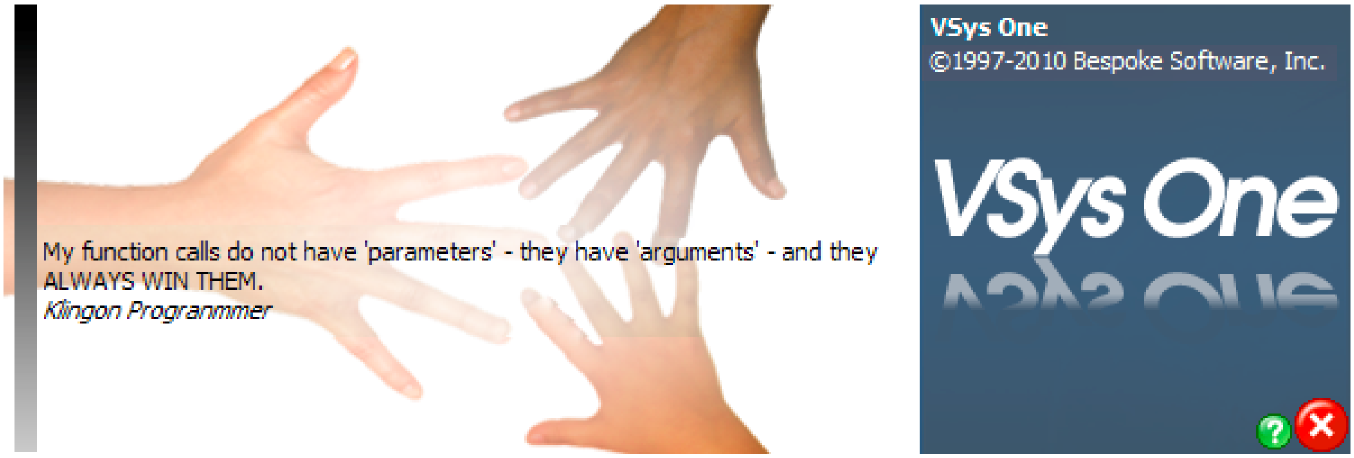
If you scan in an image and attach it to multiple people in the Comments and images tool, GMS really only stores it in the database once, and then lets all of the people link to it. Scanning the same image more than once, though, will not do this: the same image scanned more than once is always very slightly different, in which case every time it's scanned it will be stored separately and take up more space.

Cool Quotes

When GMS starts up it usually shows cool quotes on the "splash" (startup) screen. You can hide these quotes by going into the System preferences link on the Setup panel, and choosing Advanced and checking DON'T SHOW COOL QUOTES ON THE SPLASH/ABOUT SCREEN.

If you liked a quote that came by at startup but didn't get to finish reading it, click on the About GMS 6 link from the GMS main screen - the last quote you saw will come up.

To hide a quote from somebody you don't like, while the quote is on screen, click on the Never show this quote again link. GMS won't show you, or anybody else who uses the same `GMS.ini` file, that quote again.



Finally, clicking on the button will show you a list of the tools we used to create GMS 6.

Saving Changes

When the **Save** button is visible in the upper-right corner of the screen, clicking **Save** alone saves what you're working on and takes you back one level. On many screens, if you hold down **Save** for a half-second without releasing it, a popup menu will appear offering you the choice of Save and close or Save and stay here. This lets you save your changes without having to come back into the current screen.

For a keyboard shortcut, hold down the left **Ctrl** key on your keyboard while clicking **Save**. GMS will save your data but not go back and won't show the popup menu.

Keyboard Shortcuts

When you see a button with an underlined letter, e.g. Print, you can click **Alt+P** (hold down the **Alt** key on your keyboard, and while it's down, click **P**) to click that button without using the mouse.

In many places, like reports and the person lookup tool, hitting the **Enter** key is the same thing as hitting the most prominent/obvious button on screen. In these cases, it's the same as hitting the **Search** and **Print** buttons, respectively.

You can also use the **Tab** key to move quickly between fields. In the person lookup tool, your cursor ends up by default in the field for the person's family name. Type in that value, then hit **Tab** to go to the first name field, enter that, then hit **Enter** to search, all with your hands never leaving the keyboard.

Looking for a specific value in a drop down menu? Try typing in the text boxes to bring up a more limited list of options.

More Keyboard Shortcuts

In many places, like reports and the person lookup tool, hitting the **Enter** key is the same thing as hitting the most prominent/obvious button on screen. In these cases, it's the same as hitting the **Search** and **Print** buttons, respectively.

You can also use the **Tab** key to move quickly between fields. In the person lookup tool, your cursor ends up by default in the field for the person's family name. Type in that value, then hit **Tab** to go to the first name field, enter that, then hit **Enter** to search, all with your hands never leaving the keyboard.

Typing in text boxes

(Add to keyboard shortcuts in prior section?)

Not Just For Phone Numbers

You can enter e-mail addresses and web sites in phone number fields: just indicate the appropriate type for the contents of the field.

Person Lookup Tricks

Barcode/Magnetic Stripe Lookup: anywhere in the person lookup tool, scan the person's credential ID or login swipe code using your barcode or magnetic stripe scanner. If GMS recognizes the code, it will immediately find and open that person.

By ID code: In the person lookup tool, in the FAMILY NAME field, enter (or paste) a person's 16-digit ID code (e.g. "`EUW38W898JD7YZU5`"), then hit **Enter**. This is handy if you're working with the Interactive File Importer or any other tool that references this ID code for each person.

Quick Navigation

In places like the Profile editor, where you've got multiple open panels and some scroll off the bottom, clicking on the panel's name in the navigation bar on the left will bring that panel into view immediately without your having to scroll for it and find it.

Appendix

Updating GMS 6

Updating GMS is a simple process: replace two files, `GMS.exe` and, if applicable to your organization, `GMSKiosk.exe`. There are no DLLs to update, nor any other required files. Remember that the `GMS.ini` file must be in place from your previous installation. If you want to do your upgrade in a different folder, copy the `GMS.ini` file from the old folder into the new one.

If the new version requires a schema change to the database, GMS will prompt you before running that update. See **GMS Schema Updates** (page 256) for more information.

After any upgrade, be sure to run the **Rebuild various lookup indices (page 193)** tool on the Administrator tools panel. For an upgrade from any older version to GMS 6 version 1.7 or higher, it's especially important that you run two options:

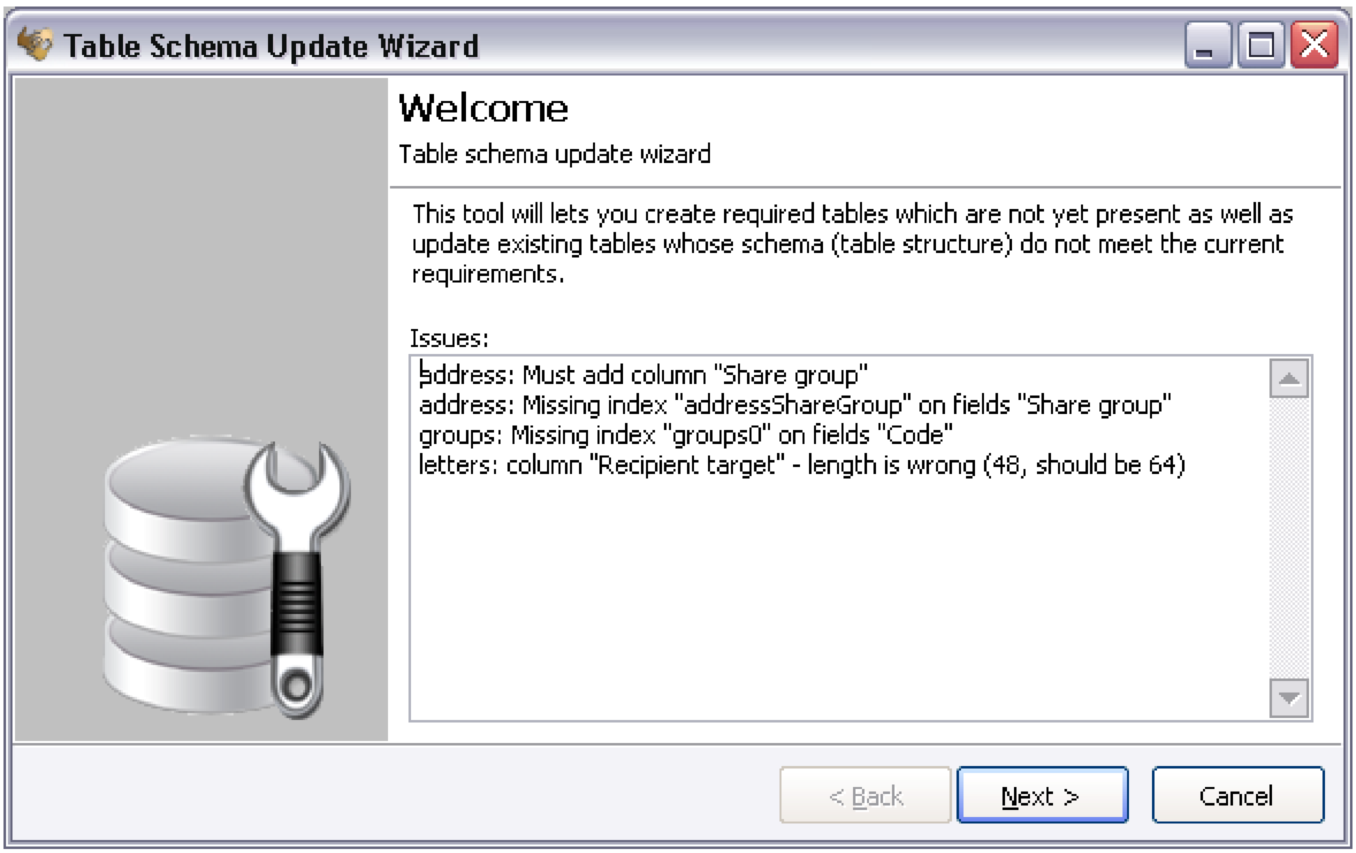
- TRANSITIONS VALUES FROM OLD FORMAT TO NEW
- POPULATE "CODE" FIELD IN OPTIONS VALUES

GMS Schema Updates

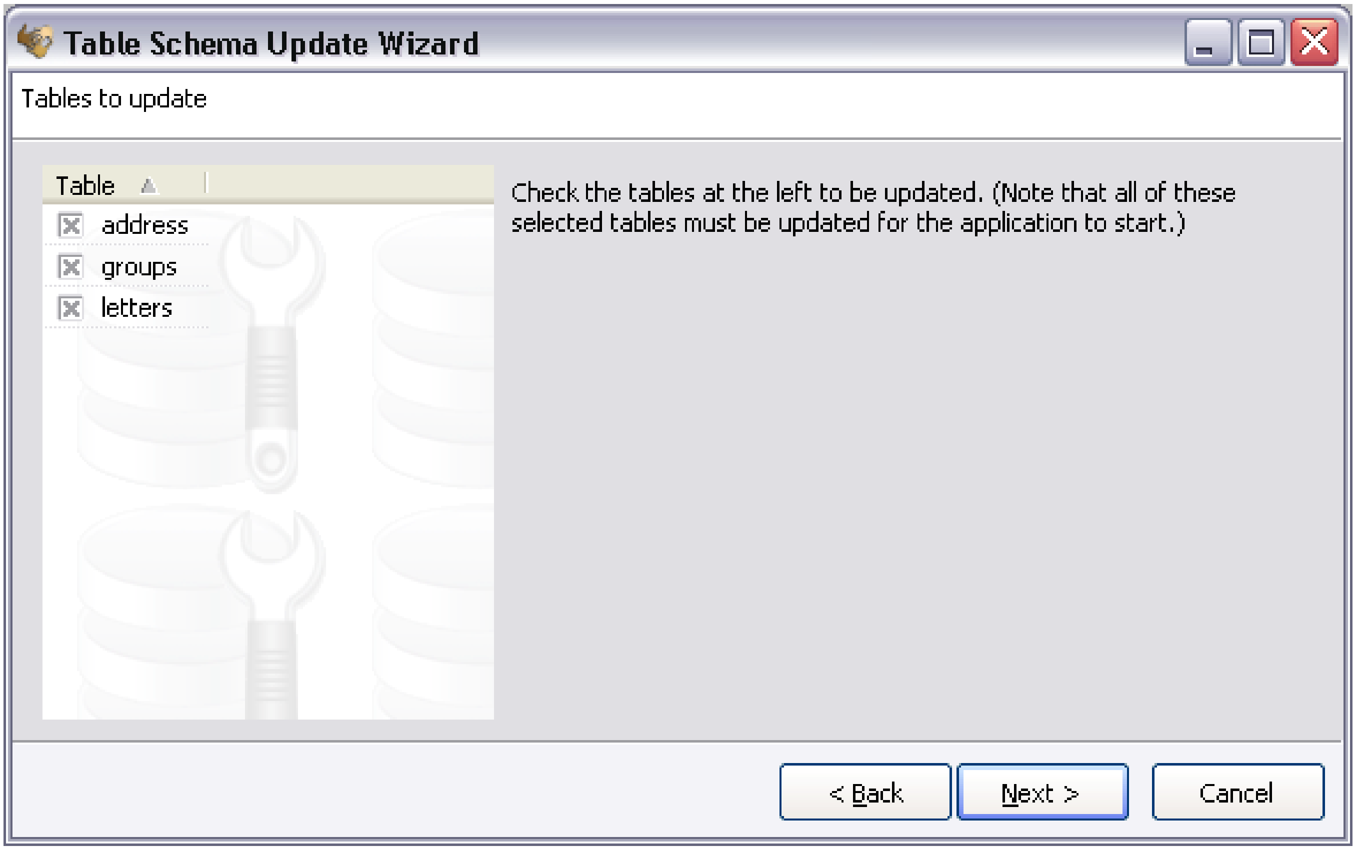
After you've done an upgrade to GMS, or if you are installing from scratch, GMS may require that its database tables be updated. This is a fairly painless process: GMS will do all of the heavy lifting of creating tables, adding or expanding columns, or adding indices.

Steps in this process

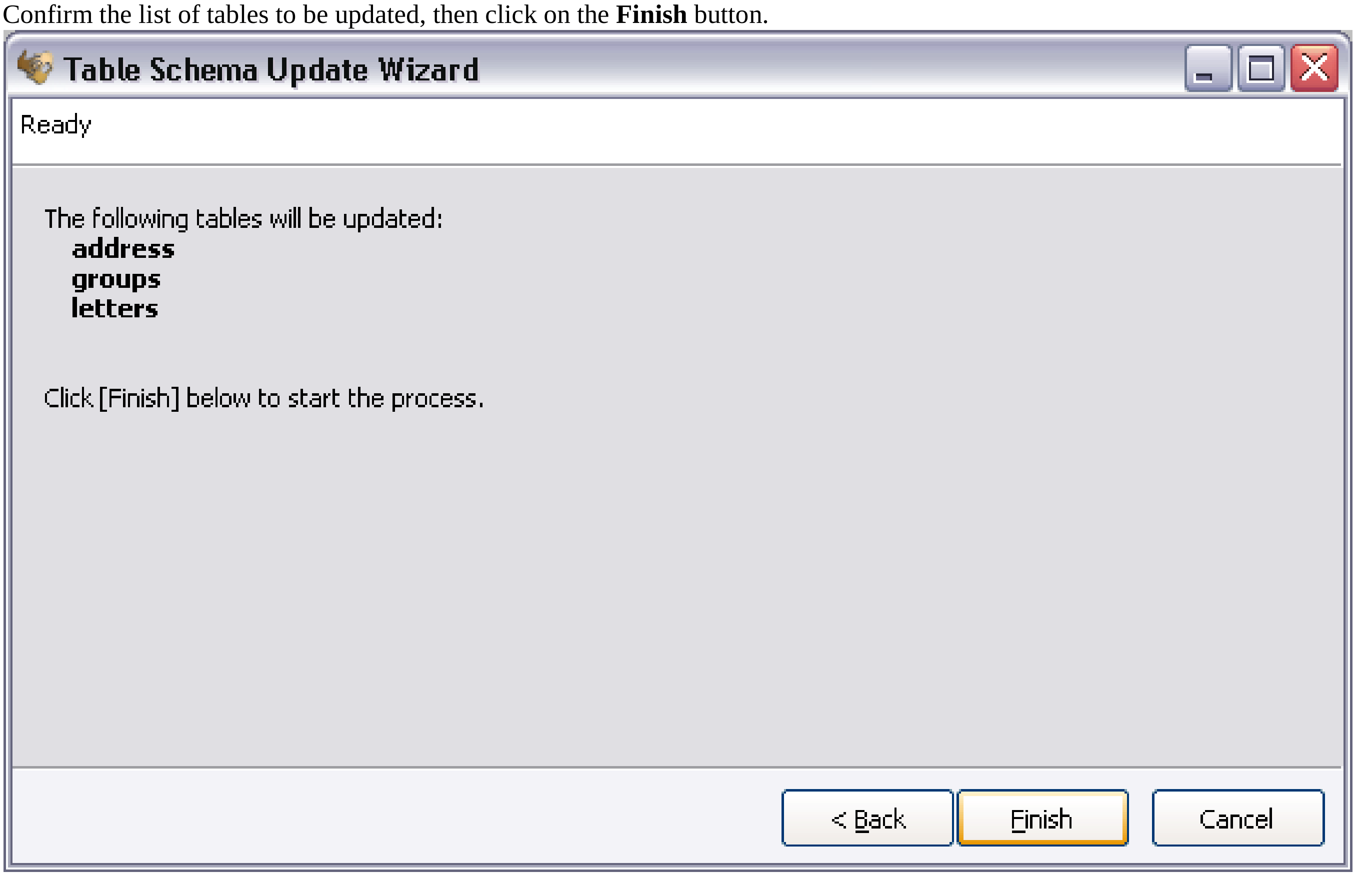
1. Click on the **Next** button from the Welcome screen as shown below.



2. Check the tables to be updated. In general, you'll run this for all of the tables which need it, which are all of the ones on-screen. Click **Next**.



3. Confirm the list of tables to be updated, then click on the **Finish** button.



4. GMS will now update the tables which need it, and if successful, will show you a completion message:

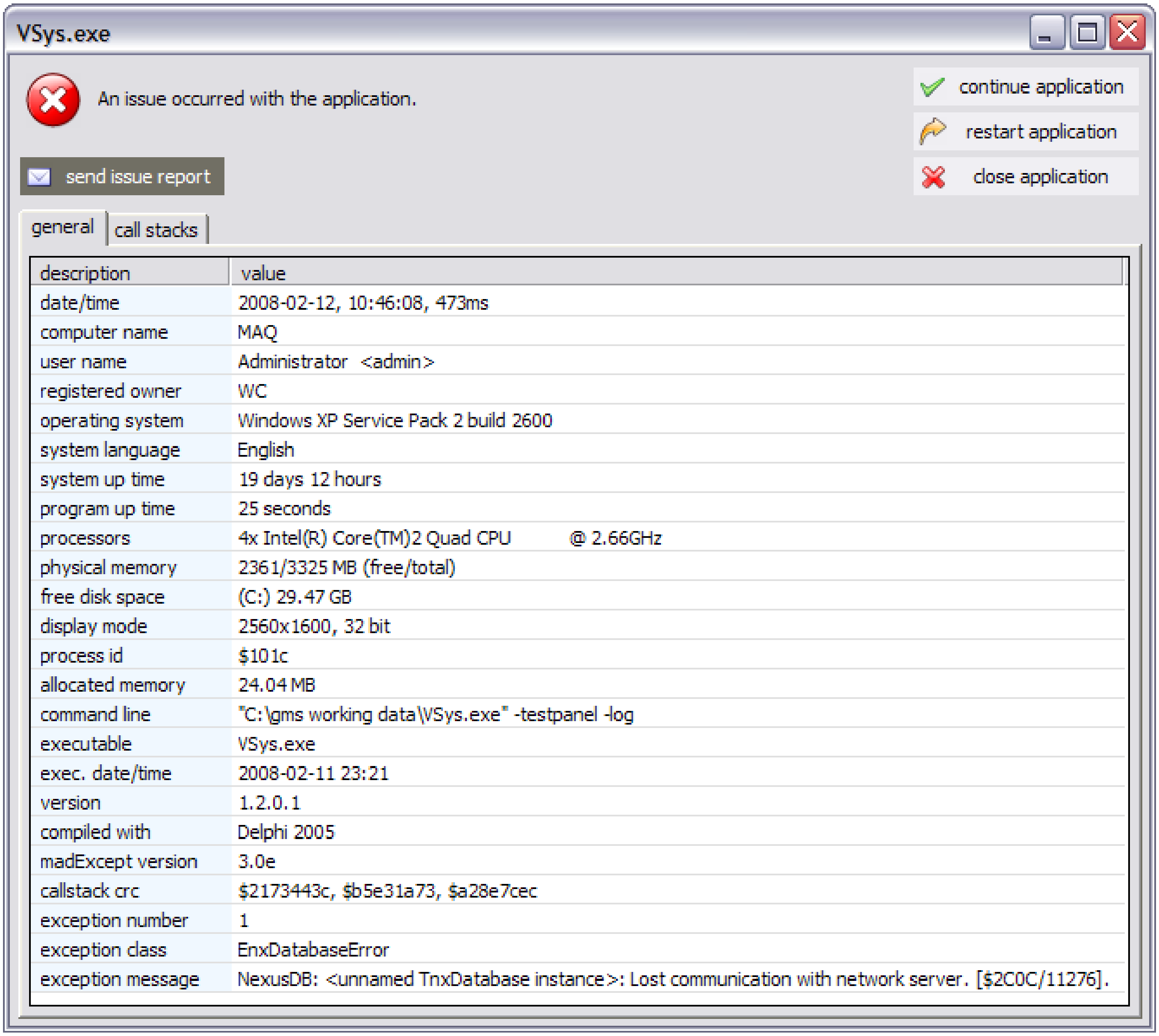
Once this process is complete, it will not need to be done by any other users. These changes affect the tables in use by all users at once.

For NexusDB databases, GMS can only run this update if no other users are in GMS at the time.

You need to have certain rights on the database to be able to successfully perform these operations. If you don't, GMS will tell you during the update process. Should that happen, contact your IT department to have someone with the appropriate database rights run this process.

Issue Reports

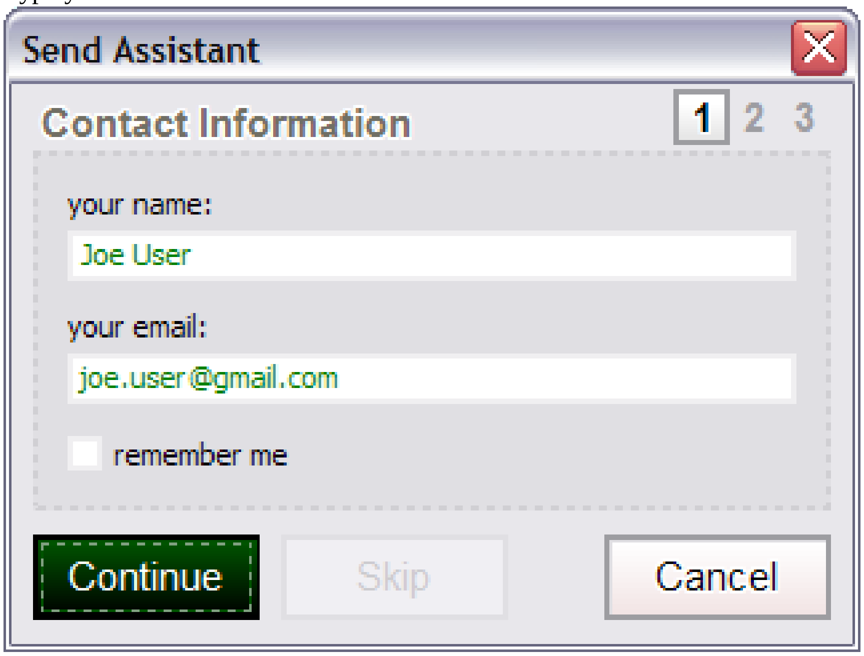
When working in GMS, an internal or external issue may bring up an issue report. This could be caused by damaged tables, a network issue, problems with Windows, or a programming issue.



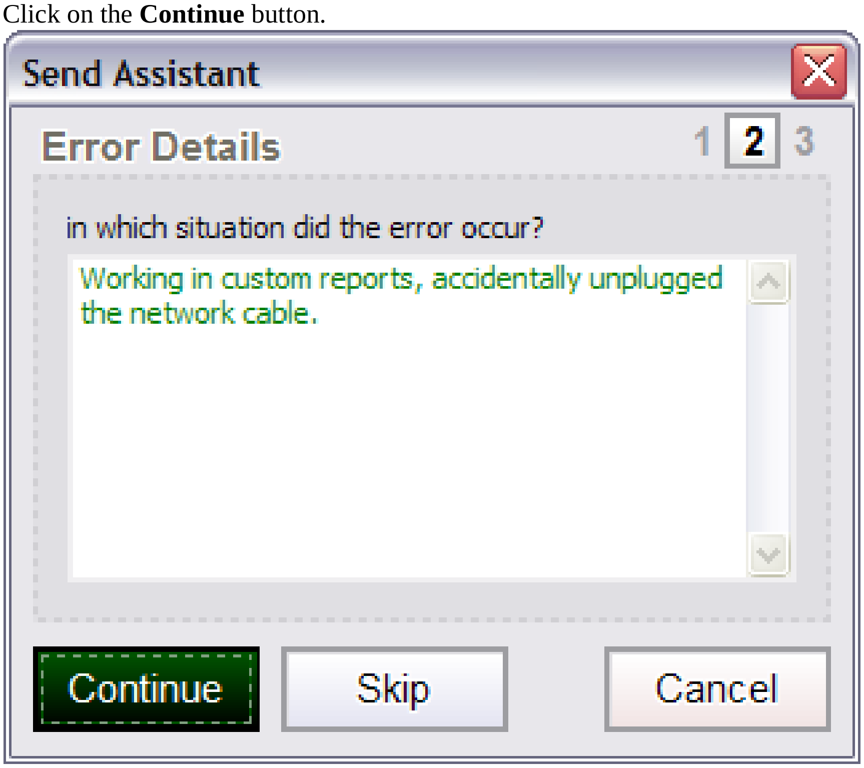
This window lets you send, save, or print an issue report. The issue report contains detailed programming information that assists Bespoke technical support in determining what caused the error and assists in resolving it. Whenever you receive any issue reports like this, it is best to send it if possible - this helps technical support determine what went wrong and how to prevent it from recurring.

Send the Issue Report

1. To send the report to another person, click the **send issue report** button.
2. Type your name and e-mail address and click the **Continue** button.



3. Enter a description of what you were doing, e.g. "Working in custom reports, accidentally unplugged the network cable". Click on the **Continue** button.



4. If any confidential information was on your screen, un-check the box ATTACH A SCREENSHOT TO THE BUG REPORT. Otherwise, leaving that image intact helps technical support see what you were seeing.

5. Click the **Continue** button to send the report. If you get an error at this point, GMS may not have been able to work with your e-mail program to send the issue report.

Tip: GMS always copies the details of the issue report to the clipboard. If this process doesn't work for sending us the report, try going into your e-mail application and simply pasting (**Ctrl V**) the report right into the body of an e-mail and sending it to our technical support.

When you are finished with the issue report, click on one of the following buttons: **continue application**, **restart application**, or **close application**.

continue application attempts to pick up from wherever the error occurred. If doing this results in more issue reports, shut down GMS and restart it. GMS may not have been able to properly recover from the first issue.

restart application closes GMS 6and starts it again. This may result in a loss of any unsaved data.

close application exits GMS 6 and does not restart it. This may result in a loss of any unsaved data.

Web-based issue reports

On machines with no local e-mail client, GMS has another option: issue report submission via the web. This is far easier than e-mail based reports and does not require that you have a compatible e-mail client on the machine that's sending the report. To enable this, edit your `GMS.ini` file to include

```
[Exceptions]
Web=1
```

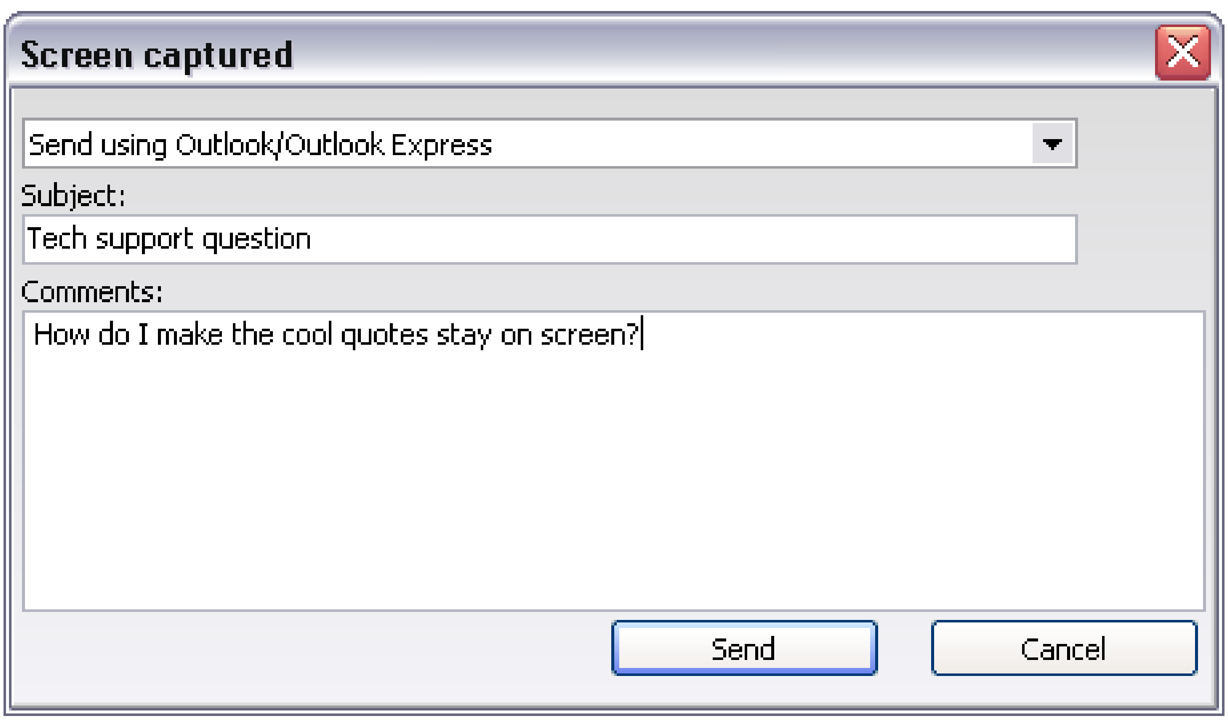
If you don't have an `[Exceptions]` section, you can add it. The next time GMS tries to submit an issue report, it will talk with Bespoke's servers to do it, then send a confirmation e-mail to both you and technical support with a URL for viewing the report and its associated screenshot.

If GMS tries to do a web submission but fails, it will fall back on trying to use your e-mail application to send the report.

Support Screenshots

Need to send a screenshot of what you're seeing to Bespoke technical support? Hold down the **Shift** key and hit the **Pause** key (usually up along the top right of your keyboard). This will copy the contents of your screen and allow you to:

- Save the screenshot to a disk file,
- Send the screenshot to Bespoke support using Outlook or Outlook Express (only if one of these is installed on your machine), or
- Send an e-mail to Bespoke support directly from GMS without using an e-mail client.



Note: GMS must be the program on your screen that has focus. Your keyboard may also require you to hit a Function (Fn) or other key as well to activate the Pause key.

Tip: You can redirect where the support e-mails go from the default (`support@ bespoke.com`) to any other e-mail account with a setting in the `GMS.ini` file:

```
[General]
ScreenCaptureRecipient=john@doe.com
```

Exceptions Reports Settings

With a few changes to the `GMS.ini` file, you can change how exceptions reports are handled.

Redirect the issue reports from their default destination to somewhere else with

```
[Exceptions]
EmailRecipient=john@doe.com
```

Send exceptions reports to Bespoke via an HTTP interface instead of a mail client with

```
[Exceptions]
Web=1
```

Databases

GMS 6 can be configured to connect to any number of different databases at startup, or just one. Database information is stored in the `GMS.ini` file, and that file is often shared among multiple users if they access a common `GMS.exe` file. GMS can use any of three different kinds of database: NexusDB 1.07 or higher, SQL Server 2000 or higher, and Oracle 9i and higher.

The tools here let you tell GMS 6 where the data is stored and how to access it. With the exception of NexusDB standalone data, they do not create these databases: you must do that in your database application first. See each database's details for those requirements.

Database Creation and Configuration

GMS works hard to make the DBA's life easy - it:

- Makes its own tables and indices, no scripts are needed. When GMS is first connected to a database, it will check for its required tables and prompt you to create any tables and indices not present.
- Can work on multiple databases at once (production, testing, training) with no special magic. Set up any number of database connections, and GMS will prompt you, when it starts up, for which database to use.
- Does its own schema updates. If GMS starts up and sees that a column is missing or too narrow, it will offer to make the changes automatically and nondestructively.
- Makes its own backups when prompted, and does so in a database-independent manner (a backup made on Oracle can be restored into Oracle, SQL Server, or NexusDB).

GMS 6 works with the database servers Oracle 9i+, SQL Server 2000+, or for small installations, NexusDB. Server load is relatively small and GMS 6 does not require its own Oracle or SQL Server instance or hardware, just its own database within an existing instance. It has no preference as to whether this database is running on its own physical hardware or in a virtual environment.

Disk space utilized depends entirely on your data. It’s a rare database that exceeds 1GB in the first year or two, and the 10GB mark is exceptionally unlikely to be reached.

Database-Specific Notes

SQL Server

Edition compatibility

SQL Server Express, Standard and Enterprise are all acceptable. GMS does not require its own SQL Server installation or even its own instance, and will work correctly with other applications on a common server.

Hardware requirements

GMS has very low requirements on your SQL Server installation. It does not require a dedicated machine, or even its own instance, just a single database to call its own. We recommend 512MB of memory, and fast disk is helpful but not mandatory. In general the working set will be under 100MB of data, and the full database under 1GB. High availability is generally not required, as Individual management is rarely considered to be mission-critical, so server redundancy is not necessary.

GMS will happily run on a virtualized copy of SQL Server. It does not require its own application server either, as it's a simple two-tiered client-server setup thick Windows client with SQL Server as the backend. GMS can also be used in a Citrix or Terminal Services environment.

Setup

In general, it's far simpler to have all GMS 6 users share a common database login ID and password rather than assigning them all their own unique SQL Server accounts, or providing rights via Active Directory. All users in the end need the same basic sets of permissions, and GMS does not use SQL Server's permissions to limit what actions individuals can perform, instead it does that authorization internally due to the complex nature of table and data interactions.

All GMS 6 users must have at least SELECT access to all GMS 6 tables. Lacking INSERT, DELETE or UPDATE rights may cause aspects of GMS 6 to not work as it attempts these operations. CREATE and ALTER rights may be needed occasionally when upgrading versions, as GMS occasionally makes changes to its expected database schema. DROP rights are only ever needed for data restores when tables already exist or for special schema updates in which one or more tables need to be built from scratch and then repopulated.

Tip: Best practice: give users `db_ddladmin` rights on their database.

When creating a SQL Server database to be used by GMS, you have several options.

Option	Preferred value	Additional information
COLLATION	`Latin1_General_BIN`	
RECOVERY MODEL	`Simple`	Other models are valid but will use unnecessary amounts of disk space and are not used by GMS.
COMPATIBILITY LEVEL	Any value is valid here.	
AUTOGROWTH	ENABLE AUTOGROWTH and UNRESTRICTED FILE GROWTH must be selected.	

Advanced notes

For GMS 6 to work correctly, SQL Server requires that the GMS 6 tables be owned by "dbo", not the person who created them. You can see table ownership within SQL Server Enterprise Manager – just open up the database where your GMS 6 data is stored, then open up Tables, the owner will show in a column next to each table. To change it, right-click on the table, select Design Table, right-click on any field and then click on "Properties". Change the owner, then click on **Close**. Click on the **Save** icon to save your changes, then continue on to the next table.

GMS 6 requires that certain columns use case-insensitive collation orders. When GMS 6 creates tables, it will specify the collation order for these columns as Latin1_General_BIN. Don't change this: GMS 6 will fail miserably but silently on many lookups if you do.

SQL Server 2008

When connecting to a SQL Server 2008 database, it's critical that the SERVER ADDRESS value is the server's canonical name, e.g. "SS2008A" rather than just its IP address. When there are multiple instances of SQL Server running, SERVER ADDRESS must be the server's canonical name + backslash + the instance name, e.g. "SS2008A\GMSInstance".

Oracle

Users

GMS has been validated on Oracle 9i and 10g. It has not been validated on Oracle 11g or higher, though it may well work in that environment.

In general, it's far simpler to have all GMS 6 users share a common database login ID and password rather than assigning them all their own unique accounts. All users in the end need the same basic sets of permissions, and GMS does not use Oracle's permissions to limit what actions individuals can perform, instead it does that authorization internally due to the complex nature of table and data interactions.

CREATE and ALTER rights may be needed when upgrading versions, as GMS occasionally makes changes to its expected database schema. DROP rights are only ever needed for data restores when tables already exist or for special schema updates in which one or more tables need to be built from scratch and then repopulated.

Hardware requirements

GMS has very low requirements on your Oracle installation. It does not require a dedicated machine, or even its own instance, just a single database to call its own. We recommend 512MB of memory, and fast disk is helpful but not mandatory. In general the working set will be under 100MB of data, and the full database under 1GB. High availability is generally not required, as Individual management is rarely considered to be mission-critical, so server redundancy is not necessary.

GMS will happily run on a virtualized copy of Oracle. It does not require its own application server either, as it's a simple two-tiered client-server setup thick Windows client with Oracle as the backend. GMS can also be used in a Citrix or Terminal Services environment.

Synonyms

Oracle stores its tables as owned by individual users. The syntax for referencing tables which are not owned by the current user would break GMS 6's methods of accessing tables in other systems (SQL Server, NexusDB), and so GMS 6 uses Oracle synonyms to make it look to the calling application like the tables owned by another user are local to the current user.

To do this, GMS 6 does a few tricks:

1. It names tables under Oracle in all upper-case (they're all lower-case on other systems).
2. For every user who logs in, GMS 6 creates a table synonym in lower-case to each table, even if the logged-in user owns the table. This allows GMS 6 to reference the table as lower-case, regardless of the ownership of the data.

This means that all GMS 6 users must have:

1. At least SELECT access to all GMS 6 tables. Lacking INSERT, DELETE or UPDATE rights may cause aspects of GMS 6 to not work as it attempts these operations.
2. The rights to create and drop synonyms.

If you really know what you're doing, you can disable synonym creation. Find the appropriate section in the ini file which corresponds to the connection you want to adjust, then put in the value

```
opt:nosynonyms=Y
```

If you do this, GMS 6 will expect that the tables are named in lower-case and are owned by the currently logged-in user.

Locking

GMS 6 uses the dbms_lock package in order to provide cooperative locking among sessions. It is therefore important that all users be granted execute rights to that package. From an Oracle prompt:

```
grant execute on dbms_lock to YOUR_ORACLE_USER;
```

Do this for every Oracle user who will log into GMS 6.

NexusDB

NexusDB is a very simple database server, primarily used with GMS in demonstration and testing configurations.

Compression

NexusDB supports integral compression when connecting to a NexusDB server. This compression is set on a client-by-client basis in each client's `GMS.ini` file. Find the appropriate section in the `.ini` file which corresponds to the connection you want to adjust, then put in the value

```
opt:compression=n
```

where "n" is 0 (for no compression) to 9 (for maximum compression). Compression is particularly helpful for users who connect to the data over the Internet. You will have to experiment to find the best setting for your circumstances. (Compression should be set to zero for connections from within your office, since the CPU time to compress and decompress the data will usually exceed the savings of less data on your network.)

Secure transports

NexusDB supports secure data connections using Blowfish/RC4 symmetric encryption. To enable and use it, put the following entries in the appropriate section of your `GMS.ini` file:

```
opt:secure=Y
opt:securekey=verybeefy
```

where "verybeefy" is your password. On the NexusDB server side, you need to set the password under Transports, Secured, Blowfish/RC4 Secured Transport and click on **Apply**, then enable the TCP/IPV4 TRANSPORT (BLOWFISH). You can optionally turn off the standard "TCP/IPv4 Transport" if you will not be allowing any incoming unsecured connections.

This is stored in plaintext on GMS 6's end and so can be read by users of this machine. The secured transport is not designed to prevent users from accessing data, it is intended to prevent "sniffing" of passwords and data on the wire by unauthorized persons.

Compression and secure transports are incompatible. Any compression level set for a secured connection will be ignored. This is due to the fact that NexusDB encrypts the data before it can be compressed, and encrypted data is generally incompressible.

Ports

NexusDB server and the GMS 6 client can be configured to communicate on other than the "standard" port 16000 (17000 for secured). To do this, put the following entry in the appropriate section of your `GMS.ini` file:

```
Port=16001
```

where 16001 is the port you've told the NexusDB server to listen on. If this is blank or zero, GMS 6 will use the standard ports when connecting.

Operating systems

Due to restrictions placed by the operating system when running Windows Vista or Windows 7, GMS cannot use run with NexusDB in standalone (non-server) mode with either of these operating systems unless the GMS data is stored someplace other than in the `\Users` or `\Program Files` folders. This may mean requiring that an administrator install GMS into the `\GMS` (or other appropriate folder) in order that standard users may then work with GMS in that folder.

Installing NexusDB Server

NexusDB server is very straightforward to install and configure.

1. Copy `nxServer.exe` to the folder on the machine where you intend to store your NexusDB data.
2. Start NexusDB server from the machine which will act as the server. This machine must not be a Windows 98 or ME machine, and should have at least 128MB of memory (more is always better).
3. Click on Aliases. At the bottom, enter an alias name "GMS 6" then the path to where your data is stored.
4. Click on **Add** to save the new alias and its path, so that NexusDB knows where to look for files when a copy of GMS 6 asks for it.
5. Click on the plus sign next to Transports, then on TCP/IPv4 Transport. Check the ACTIVE checkbox in the upper-left corner.
6. Click on GUI Settings, then check the boxes MINIMIZE SERVER ON APPLICATION START, BRING UP SERVER ON APPLICATION START, AUTOSAVE CONFIGURATION ON EXIT and CLOSE SERVER FROM TRAY ONLY. Click on the **Apply** button if it's not grayed-out.
7. Click on Server Engine, then check the ACTIVE checkbox in the upper-left corner to start the server. It is also recommended that you set the TEMPORARY STORE size from the default of "-1" (unlimited) to something around 100MB. This will keep the free space on your server from getting eaten up by the log files.
8. Click on Plugins then ServerInfoPlugin and check the ACTIVE checkbox.

NexusDB is now configured and started. For applications to connect to it, the NexusDB server will need to be started. You should probably add a shortcut `nxServer.exe` to the startup folder to ensure this, or you can manually start it each time you reboot this machine.

Configuring NexusDB Server as a Windows Service

Only a user with full administrator rights to the server can perform these steps to completion. He should have familiarity with System Administration on the network. If not then he should contact his IT representative to run this setup.

Why run NexusDB Server as a service? When NexusDB Server is run as a regular application in Windows' startup folder, it does not start until someone has logged into the machine, and stops when that user logs out. Running it as a service allows it to run as soon as Windows starts up, and it can remain running until the machine is turned off.

NexusDB cannot refer to data on mapped network drives when running as a service. It must either be on a local drive or referenced via a UNC path, e.g. \\YOURSERVER\NexusDBData, not b:\NexusDB.

Getting Started

Before you can set the NexusDB server as a service, you must have it configured correctly to connect to the data in your office. Once the service is running, you cannot reconfigure it to change network settings, database aliases or other values without stopping the service.

Installing the service

First, add a new user on the server, setting the password so that it never expires (NexusDB Server will log in with the rights of this user). Once that user is created, you need to enable that account to run services. Open the Local Security Policy, then go under Local Policies, User Rights Assignment and open Log on as a service from the list. Add the new user to this list and save.

Install the service itself by opening a command prompt in the directory of where nxServer.exe is located. You can do this by clicking on **Start**, then Run and entering `cmd` then pressing **Enter**. Change to where `nxserver.exe` is located. Type the following then hit **Enter**:

```
nxServer.exe /install /username:.\account  /password:password
```

An information window should appear "Service installed successfully", click **OK**. Then a confirm window will appear asking if you want to start the service, click **No**. From the next reboot of the Windows server forward, NexusDB should load as a service. Verify this in the next section of the documentation, or if the users rights were not configured properly.

Configure the Windows service

This section is not necessary if the user has the proper rights assigned.

1. Open the Control Panel's Administrative Tools and click Services, then double click NexusDB Server. Go to the **Log On** tab and select the user created earlier and enter their password. This information might already be listed, but enter it again anyway. Click **OK** when finished.
2. Right-click on NexusDB Server and start the service.

3. Go and start GMS, it should open to the NexusDB server copy of data. Restart the server and start GMS to verify it opens as expected.

Table rebuild tool

Concepts

NexusDB is unlike SQL Server and Oracle in that it can be used in single-user standalone mode, with GMS writing directly to the database tables itself. Even when using NexusDB Server, NexusDB tables are more prone to file damage than those used by SQL Server and Oracle. This tool provides a mechanism for verifying and repairing possibly damaged tables.

The first sign that something may be amiss with your tables would be an error like:

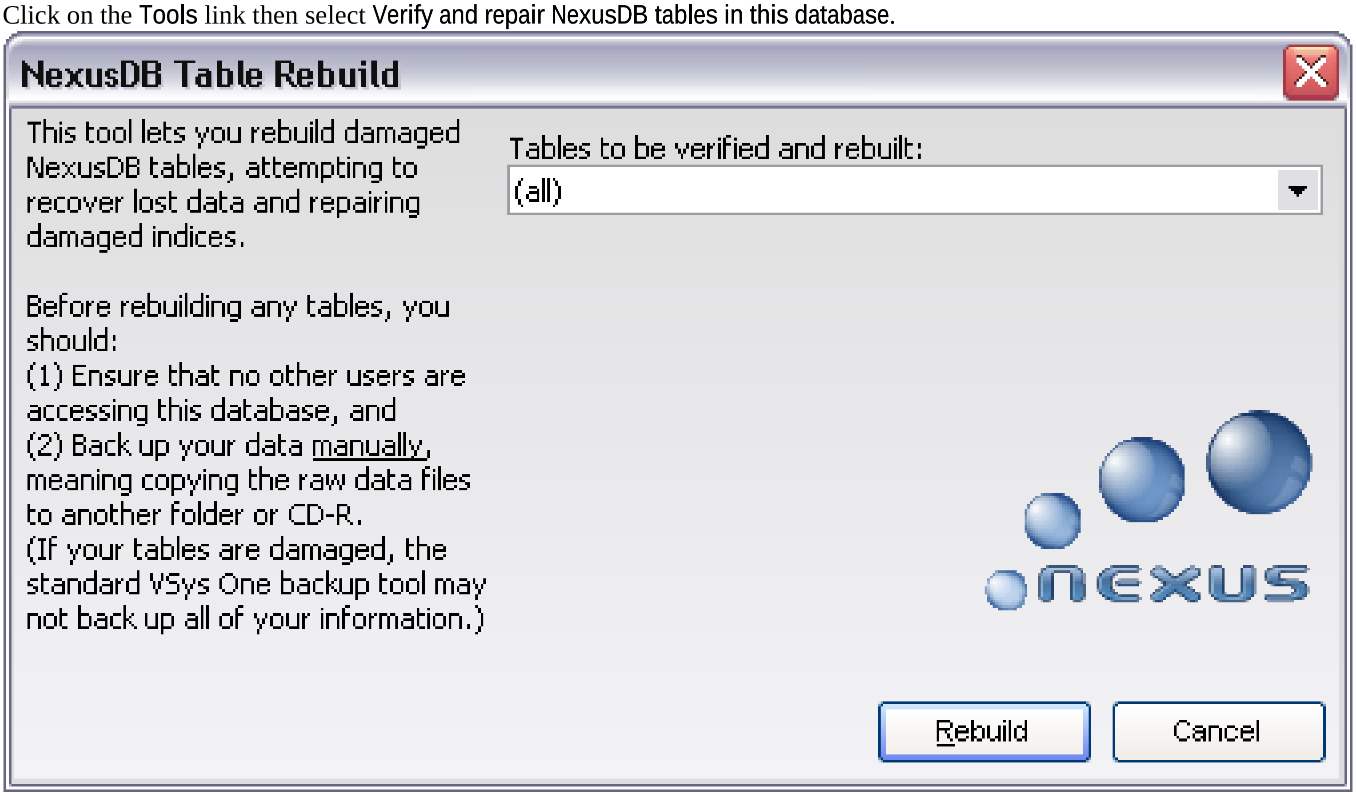
```
      exception message: NexusDB: <unnamed TnxTable instance>: Read
failure[$2401/9217]
```

Your first course of action is to call or e-mail. We can read the error report and tell you which (if any table) has a problem. If this is not feasible due to time zone issues (or it's a weekend or holiday), you can follow the repair process yourself on all tables – no damage will occur if you repair an undamaged table.

Caution: Always make a backup of the underlying files (`*.nx1` files) before using this tool.

Steps in this task

1. Get all other users out of GMS, this includes closing down VOXI and the Standalone E-mail Robot if you're using them. This tool can only be used if no other users have any tables open.
2. Back up your data. Do this by backing up the underlying `*.nx1` files rather than the GMS 6 backup tool since that tool may not be able to capture all records from damaged tables.
3. Get to the database selection window and choose the database to work with. If GMS starts without prompting you for which database to use, hold down the left **Ctrl** key while GMS starts up. This will force GMS to prompt you for a database, allowing you to use this tool.
4. Click on the Tools link then select Verify and repair NexusDB tables in this database.



5. Select which tables to verify.
6. Click **Rebuild**.

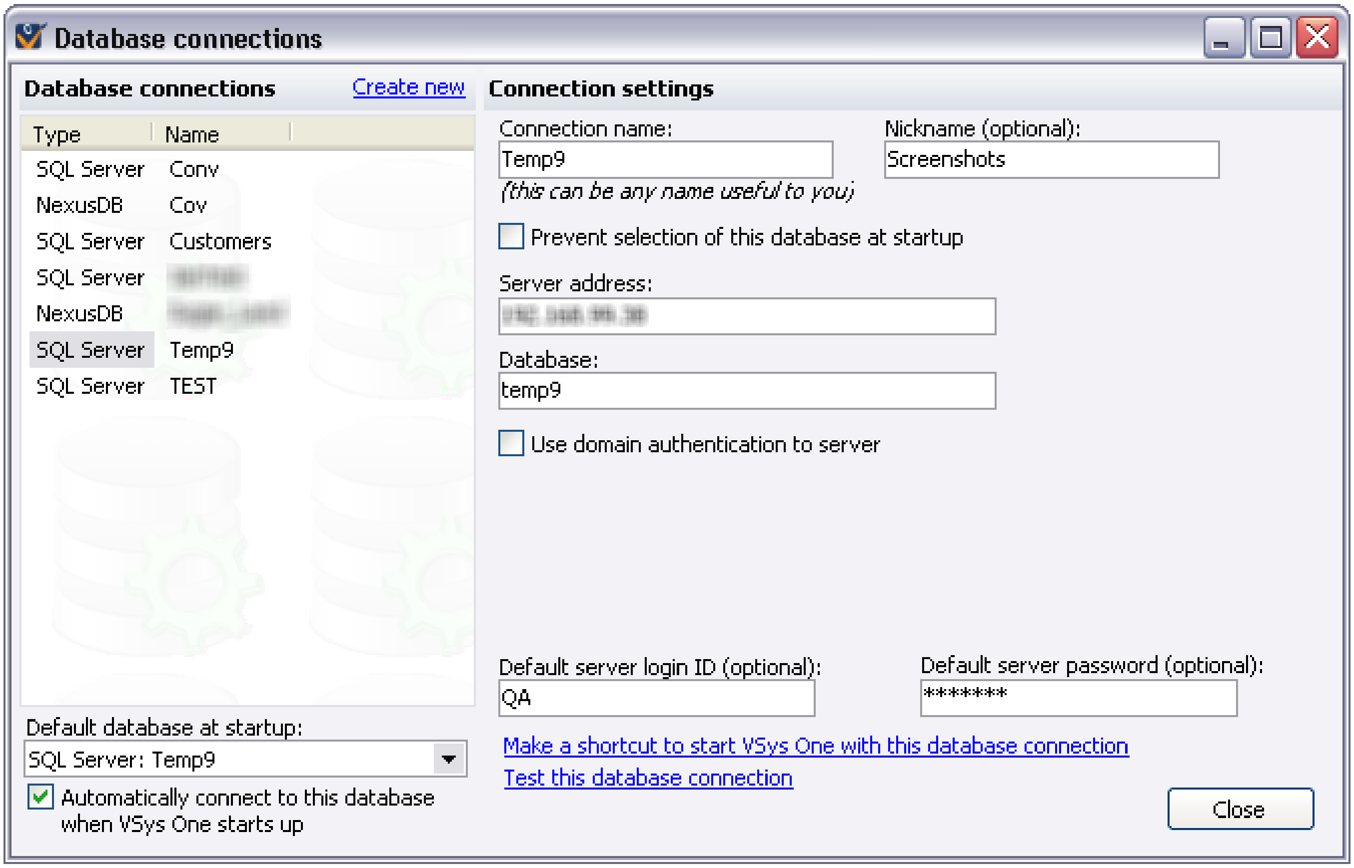
GMS will now check each table and report back the results of its progress.

Connecting GMS to a Database

Getting started

Open the setup databases tool from either of two places:

- Clicking on the GMS databases link from the Administrator tools panel.
- From the database selector screen when you first start GMS, click on Setup databases from the Tools link. This screen only comes up when GMS doesn't start up with a default database. You can force this screen to come up by holding down the left **Ctrl** key as GMS starts.



Right-click on an existing database connection to edit, duplicate, or delete it.

On this screen

Create new — Click this link to define a new database connection.

DEFAULT DATABASE AT STARTUP — This database connection will be the one selected by default on the GMS 6 startup screen.

AUTOMATICALLY CONNECT TO THIS DATABASE WHEN GMS 6 STARTS UP — If you've selected a database connection above and check this box, GMS will automatically try to connect to that database when it first starts up and won't prompt you for a database name.

CONNECTION NAME — Name your database connections in a way that makes the most sense to you. If you have just one, "GMS 6 Data" would make sense. If you have production and test databases, "Production" and "Testing" would make sense.

NICKNAME — Optionally enter a name here to be able to use it more easily in command-line tools like `datapump` (page 277). This name should be unique across all database entries.

PREVENT SELECTION OF THIS DATABASE AT STARTUP — Checking this box will prevent this database connection from showing on the list of databases when GMS 6 is started. Use this for test databases, for example.

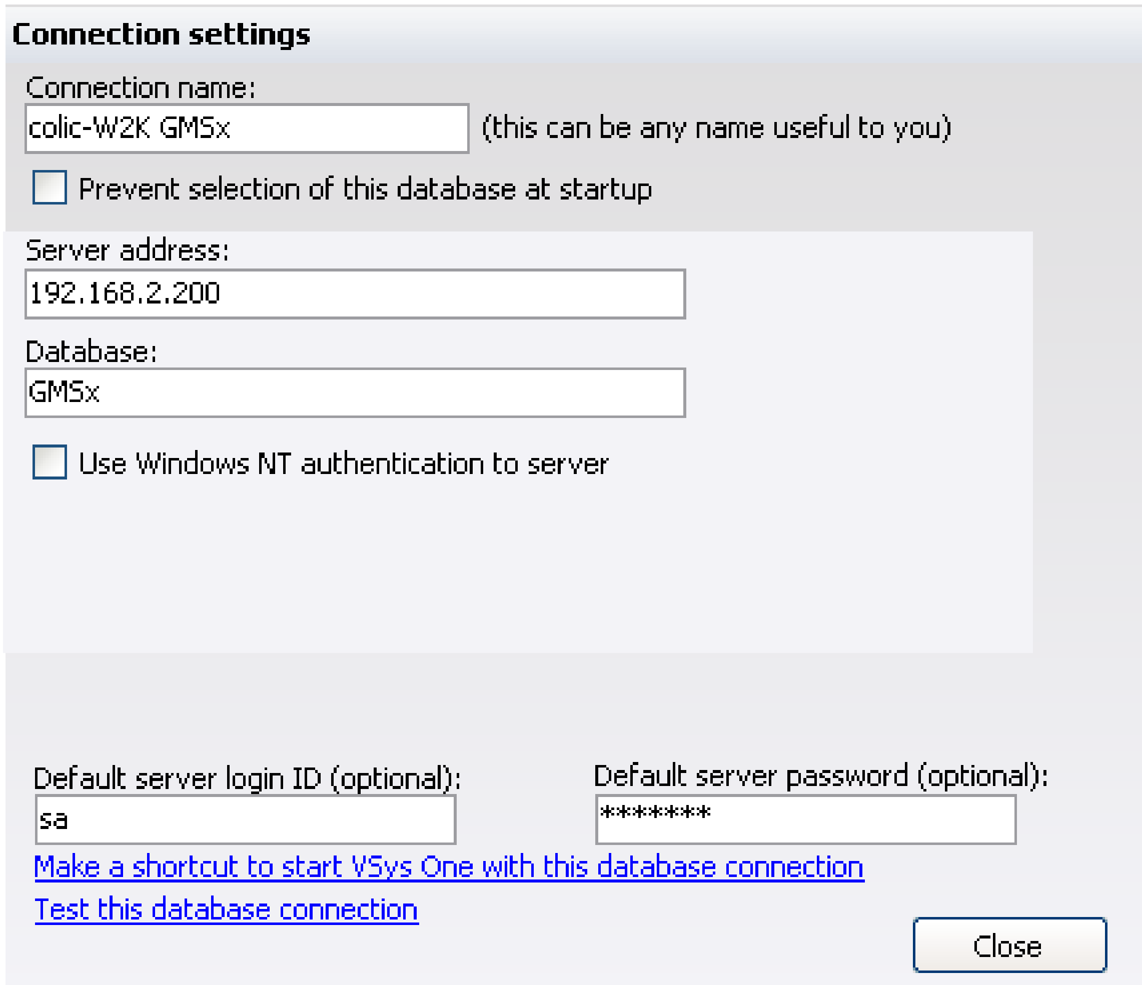
Make a shortcut to start GMS 6...	Creates a shortcut, usually saved on your desktop, with the appropriate command-line options to start GMS with the currently-selected database without prompting the user each time it's started. This can be useful to have different icons for different databases, e.g. one for testing and one for production, both using the same copy of `GMS.exe`.

After creating or editing a database connection's settings, click on the Test this database connection link. GMS will try to connect to the database using the settings you've entered, and report any connection problems it finds.

Tip: To bypass the AUTOMATICALLY CONNECT TO THIS DATABASE WHEN GMS STARTS UP action, hold down the left **Ctrl** key on your keyboard as GMS starts up

SQL Server Connection Settings

Using SQL Server requires that you first ***configure SQL Server*** (page 264) itself, establish the database, and create SQL Server users. GMS 6 will automatically create the empty tables within your database the first time it starts up.

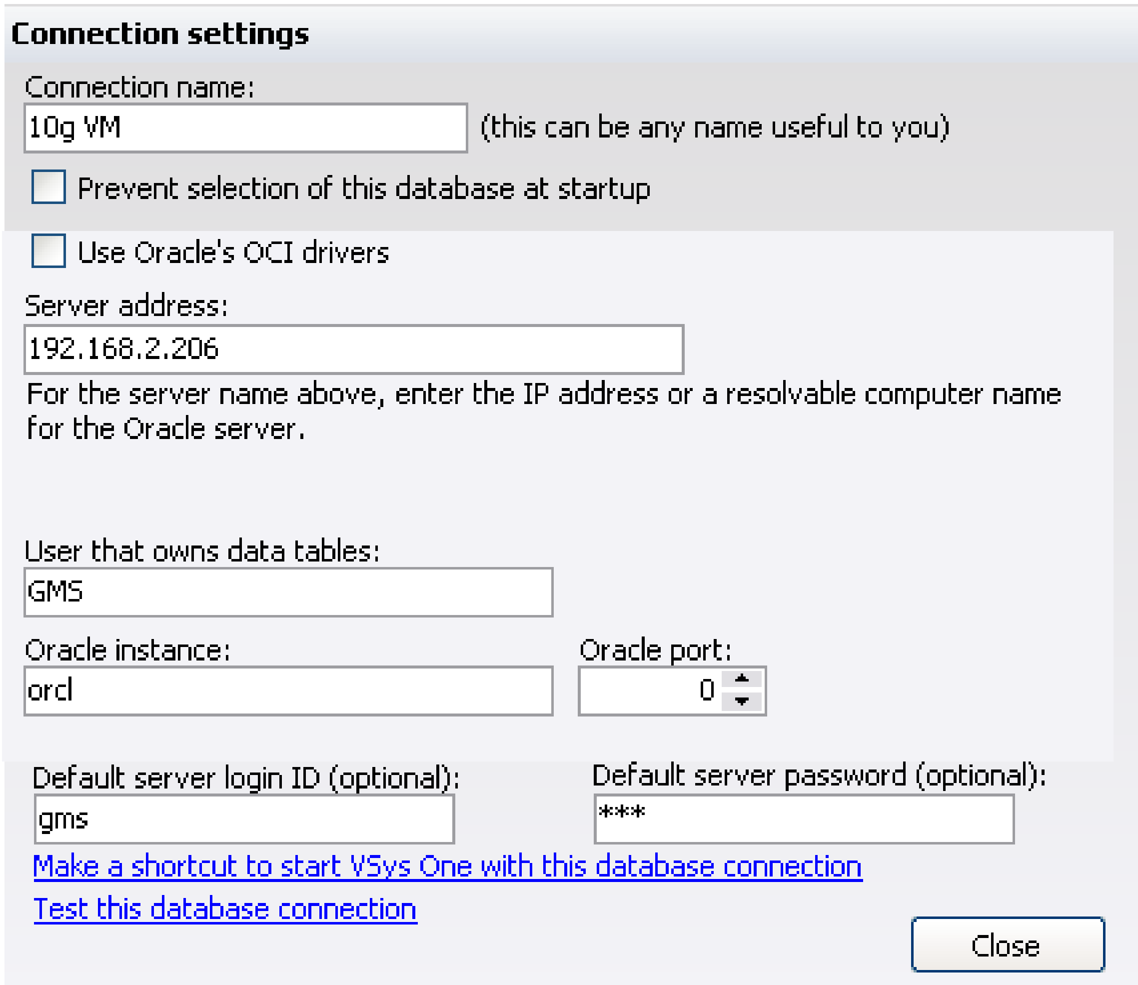


Field name	Description
SERVER ADDRESS	Enter the IP address (e.g. 192.168.2.1) or DNS-resolvable name (e.g. GMSdata.myorg.com) of the server which holds your data.
DATABASE	The name of the database within SQL Server that holds your data. This will have been set by your database administrator. To specify an instance on a server, use the backslash ("\") character to delimit the instance from the address. For example, "192.168.2.235\InstanceName".
USE DOMAIN AUTHENTICATION TO SERVER	If checked, GMS 6 will use your Active Directory login to log into SQL Server and won't prompt you for a user ID and password.

DEFAULT SERVER LOGIN ID	When users are prompted to log in to SQL Server, this ID will be provided by default.
DEFAULT SERVER PASSWORD	When users are prompted to log in to SQL Server, this password will be provided by default.

Oracle

Using Oracle requires that you first ***configure Oracle*** (page 265) itself, establish the database, and create Oracle users. GMS 6 will automatically create the empty tables within your database the first time it starts up.



Field name	Description
USE ORACLE'S OCI DRIVERS	GMS 6 can use its own direct drivers to connect to Oracle, which bypasses the need for installing Oracle's proprietary client. If this option is checked, GMS 6 will use and require Oracle's drivers. (Unless you are having problems, leave this unchecked.)
SERVER ADDRESS (USE ORACLE'S OCI DRIVERS *is unchecked)*	Enter the IP address (e.g. 192.168.2.1) or DNS-resolvable name (e.g. GMSdata.myorg.com) of the server which holds your data.
SERVER ADDRESS (USE ORACLE'S OCI DRIVERS *is checked)*	Enter the server name known to Oracle in your local Oracle configuration.

USER THAT OWNS DATA TABLES	If the user ID that you log in to Oracle with is not the user that owns the GMS 6 tables, enter the name of the user that owns the tables here. GMS 6 will create Oracle synonyms when it starts so that the logged-in user can reference the tables as if it owns them. Leave this blank if the logged-in user is the user that owns the tables.
ORACLE INSTANCE	Optional – if entered, this should be the name of the specific instance of Oracle to connect to on a machine with multiple instances running.
ORACLE PORT	Optional – if entered, this should be the TCP port on which Oracle is listening for connections. Normally you'd leave this blank.
DEFAULT SERVER LOGIN ID	When users are prompted to log in to Oracle, this ID will be provided by default.
DEFAULT SERVER PASSWORD	When users are prompted to log in to Oracle, this password will be provided by default.

NexusDB

NexusDB is simple, fast, reliable, and free, making it the preferred database in most offices. To use GMS 6 in standalone mode (on a laptop, for example, not connected to a common server) you'll always use NexusDB.

Work with local data files directly

Standalone in this case means that GMS 6 uses its data files directly, with the files usually stored on the same machine that GMS runs on. Only one copy of GMS can be running at a time, but this mode does not require any other programs to be running or any special configuration.

FOLDER WITH DATA FILES	The folder on your hard drive or network which contains the .nx1 files which represent GMS 6's data.

Connect to a NexusDB server

Server mode connects to a remote or local copy of NexusDB server, rather than the data files directly. This is a more robust mode and allows an unlimited number of users to simultaneously access the same data. Using NexusDB server requires that you first ***configure NexusDB server*** (page 266) itself and establish the data folder and alias. GMS 6 will automatically create the empty tables within your database the first time it starts up.

Field name	Description
SERVER ADDRESS	IP address (e.g. 192.168.2.1) or name of the machine (e.g. GMSdata.myorg.com) where `nxServer.exe` is running.
SERVER NAME	Normally "NexusDB".
DATABASE ALIAS	The alias is the name that you gave the database when setting up NexusDB server, not the folder that the files are stored in.
NEXUSDB SERVER CONFIGURATION REQUIRES YOU TO LOG IN BEFORE ACCESSING DATA	If you defined users in NexusDB server, check this box. GMS users will be prompted for a user name and password when they connect to the database. Note: users must have "Read" and "Write" access to NexusDB server for GMS 6 to function properly.
NEXUSDB PORT	Leave this blank to use the default port of 16000, or enter a specific port number if you've configured NexusDB server to use a different one.
DEFAULT SERVER LOGIN ID	When users are prompted to log in to NexusDB, this ID will be provided by default.
DEFAULT SERVER PASSWORD	When users are prompted to log in to NexusDB, this password will be provided by default.

IT Labor Estimates

As you're working through the budgeting and ROI process, use these numbers as round figures estimates on what it takes to get GMS 6 installed.

Database setup

For SQL Server or Oracle, you'll generally have one primary database to establish, along with one testing database. Assuming a single SQL Server user, one or two more won't make much of a difference. DBA does not need to do more than create the empty databases and users with appropriate rights. GMS will handle creating the tables and indices once it's pointed at the databases.

- DBA time: 1 hour (probably), 2 hours (at the outside)

Server Installation

GMS is managed best with a single file server share which all or most users will use together. GMS will use approximately 50MB on this share at the very outside. The contents of this share do not need to be regularly backed up, as no data is stored here.

For ex-IndividualWorks organizations, you already have a common file share for its operation. And GMS does not require any more rights to this share than IndividualWorks did. In fact, GMS can operate without write access to the share once the program is fully operational.

- Server time: 15 minutes (mostly to fill out the paperwork signing off on the process).

For other organizations, you'll need to establish a share which all users who will work with GMS have at least read and execute permissions on.

- Server time: 1 hour.

Workstation Installation

GMS needs to be installed only once (on one machine), with the executable installed on a network share. Machines 2 and later need only a shortcut on their desktop to the common executable. Assuming that the machines are geographically convenient, and already operational and on your network, figure:

- One hour for the first machine.
- 15 minutes for each additional machine.

Database Conversion

This depends a lot on the Individual office staff. The process is a straightforward one. Use our tool to extract the full IndividualWorks database and send it to us for conversion. We return a GMS backup which GMS can restore into the SQL Server database. Most conversions take two or three passes as different organizations want their data moved into slightly different places.

Assuming that the Individual office staff is inexperienced in this type of process, estimate one hour for the first data extraction (mostly watching it go, then uploading the results), one hour for the first results. The second and third updates will go a bit faster, figure 1/2 hour each way. There is nothing technical about the conversion process, either sending to us or putting the resultant files into GMS, it's all very well documented. If the Individual office staff is technically savvy, you can cut the IT staff time in half, possibly more.

Data conversion:

- 4 hours (IT staff doing all of the work)
- 2 hours (work split between IT and Individual office)

Implementation Timeline

This timeline assumes a conversion of IndividualWorks data into GMS 6, which is a largely automated process with many options. For other conversions the process may take substantially longer depending on the source data. If no conversion is needed this timeline can be compressed substantially.

Pre-conversion

- Contract signing
- Welcome letter, installation key and serial number generated, sent to customer electronically or by mail
- Kickoff meeting: initial needs analysis conference with Individual office staff and IT staff to
  - walk through process, answer questions.
  - establish conversion milestone dates including customer data transfers to Bespoke, draft and final results to customer, go-live date
  - schedule on-site training (optional)
- Installation IT infrastructure (hardware set-up and database configuration), touch screen/kiosk rollout (if applicable)
- Test installation at customer site(s) to validate database server/infrastructure setup

Week 1

- Initial transfer of customer data to Bespoke by e-mail, FTP or other means
- Conversion data analysis by Bespoke (2 days)
- GMS 6 database created by customer (Bespoke support available for remote assistance)
- GMS 6 software installed by customer (Bespoke support available for remote assistance)
- Conversion draft one returned to customer

Week 2

- Training session #1 (web-based, two hours)
- Customer critique and evaluation of draft 1 converted data

Week 3

- Training session #2 (web-based, two hours)
- Optional – conversion draft 2 (if necessary) for fine tuning
- Additional critique and communications between Bespoke's Conversion Lead and customer representative(s)
- Final customer testing & review of converted data

Week 4

- Go-Live minus 2 (days) … final transfer from existing system to Bespoke, data entry into existing system ceased
- Go-Live minus 1 (days) … transfer final converted data to customer (by COB).
- Go-Live Day … customer installation of final converted data to GMS at customer site

Post-conversion

- Customer manual conversion cleanup
- Support available for assistance on any technical issues, and with user-definable report design layouts as needed.
- On-site training (optional)

How GMS Encrypts Data

This section is highly technical and is provided only as a reference for those trained in encryption and for the incurably curious.

GMS uses two-phase encryption on encrypted data, similar to PGP. For each record to be stored, a random 192-bit AES key is generated, and the data is encrypted with that key. The AES key is then encrypted using RSA, and prepended to the AES-encrypted data. This gives the performance of AES (very fast), with the public/private key abilities of RSA (very slow).

Every record uses its own AES key, so each record must be decrypted individually using the private key. Within the record, all elements that are to be encrypted in the same encryption group are bundled together and encrypted as a group, to minimize the number of RSA encryption/decryption cycles.

User keys are composed of three elements:

- The user's passphrase, which is never stored,
- A random user code, which is generated for each user ID for each key and stored in the database, and
- An encrypted version of the decryption key, which is stored on a USB key or other external medium.

GMS encrypts the master decryption key with a combination of the user's passphrase and the user's database-stored code. When the user tries to use his key, GMS asks for the passphrase and looks up the user's code. If the two are provided correctly, GMS is able to decrypt the encryption key and use it.

When a user's key is revoked, that database-stored code is removed. Without it, GMS cannot decrypt the user's key, making the key useless.

GMS 6's encryption is intended to hide the data itself, not the fact that data is present or missing. Empty fields are not stored, and the size of each encrypted bundle is directly proportional to the source data. It may be possible to determine that detailed information about an individual is stored, and, therefore, that history exists. From a large record size, someone may, correctly or otherwise, infer that negative data is present. The actual contents of the data, of course, remain secure.

User passphrases

The user's passphrases are never stored in GMS or in the keys themselves. User key passphrases can be changed on individual keys, but only by the user, or by someone who knows that user's passphrase. If the passphrase is lost, generate a new user key from scratch. No data is lost in this process, since the user key is derived from the master key.

Tracing (Audit Logs) Security

GMS generally requires READ, UPDATE, INSERT and DELETE privileges on its tables. One major exception is the "trace" table. Only 6 tool in GMS ever deletes records from this table, the Purge Old Trace Records (page 191) tool, and no tools update any records here. To enhance the security of the tracing logs, you can prevent GMS from running that operation by revoking the privileges of GMS users at the database level, leaving them only READ and INSERT privileges.

GMS still requires READ and INSERT privileges, even if tracing is disabled (it stores some minor information there).

Command Line Tools

GMS provides for multiple tools which can be run from the Windows command line. These tools are run individually, and GMS shuts down when all are complete.

Note: the commands are not necessarily run in the order in which you specify them. GMS may re-order them and run them as it sees fit in order to optimize its own internal processes.

Command Line Backups

GMS can be told to run its ***backups*** (page 177) directly from the command line, rather than using the visual user interface. These are handy for scheduled backups that you can have automatically run by Windows as a scheduled task, or by any enterprise management tool which permits scheduled jobs.

Run a command-line backup by launching GMS with the `backup:` parameter, followed by any options. For example,

```
GMS.exe backup:{yyyy-mm-dd.hh.nn.ss.zip},password:beef,omitimages
```

or,

```
GMS.exe backup:{mm-dd-yyyy.zip},maxsize:10
```

When run on February 12, 2010 at 5:56:00pm, the first would result in a file named `2010-02-12.17.56.00.zip`, the second example would produce `02-12-2010.zip`.

You can't choose which tables to include, but you can specify those to be omitted. Do this by putting the table names with dash characters in front of them, delimited by commas. For example,

```
GMS.exe backup:{yyyy.mm.dd},-zips,-trace
```

will omit the tables "zips" and "trace".

Parameter	Meaning
password	Text used to encrypt the backup, in this example, "beef".
omitimages	Excludes from the backup any scanned forms or images associated with comments.
maxsize	If the backup file would exceed this size, breaks the backup into multiple files all no larger than this value (in megabytes).

GMS must be configured to automatically start with a database for these backups to work. If GMS prompts you for a database to use when it's run, the backup process cannot work.

Command Line Datapump

Concepts

For organizations with with production and test databases (you do have a test environment, don't you?), copying updated production data into the test environment can be cumbersome. Rather than having to back up the production data and restore it into the testing database, you can use the `datapump` command-line tool.

Steps in This Task

1. Determine the source and target databases. A database's name can be either its backend plus a colon plus name, e.g. "SQL Server: Production" or its ***nickname*** (page 270).
2. Make a backup. When you run this task, GMS does not verify that you aren't moving the wrong database to an even more wrong location, e.g. an evaluation database onto your production database. So back up the production database just in case.
3. Get to a Windows command line in the folder that `GMS.exe` and `GMS.ini` are located.
4. Enter the command line
   `GMS.exe datapump:source,target`
   Where `source` is the production database's name or nickname, and `target` is the test database's name or nickname.
5. For each GMS-recognized table in the source database, GMS will delete that table in the target database and re-create it with the contents of the table from the source database.

Command Line Index Rebuilder

GMS can be told to run the **index rebuild** tool directly from the command line, rather than using the visual user interface. These are handy for scheduled runs without having to involve users.

Run the **command-line index rebuild** tool by launching GMS with the `ixrebuild:` parameter, followed by any options. For example,

```
GMS.exe ixrebuild
```

or,

```
GMS.exe ixrebuild:purexml,transitions,optionunique
```

Rebuild codes	Meaning
all	Runs all known rebuilders
shortnames	Sound-alike names, statuses and dates for people
address	Lookup values (phone, e-mail) for all addresses
people	Personal data for all people (wheelchair, inactive, deceased, languages)
banned	Banned list attributes
jobs	Job and slot specifications
listunique	"Unique" values on lists
hours	Descriptions in hours records
addrvalues	Various address table issues
purexml	XML <-> compatibility field updates
nulldates	Zero but non-NULL date fields
attachments	Remove attached files no longer in use
training	Various training course values
availability	Availability detail records
entries	Lookup values (checked-in, alternate) for entries
transitions	Transitions values from old format to new
optionunique	Populate "Code" field in options values
optionbogus	Remove orphaned options values records
assslotmatch	Automatically match assignments to open job slots
assignremlost	Delete future assignments for non-existent people
locgeo	Update geographic coordinates for locations from their zip/postal codes

GMS must be configured to automatically start with a database for these to work. If GMS prompts you for a database to use when it's run, the automated index rebuilder cannot work.

Command Line Assignment Reminders

Concepts

The Assignment Reminders tool, which sends out automated e-mail and or SMS reminders to Individuals for upcoming assignments, can be run from the command line. This helps ensure that it's run on a regular (at least daily) basis.

Details

Create a desktop shortcut similar to the following, changing the path to GMS as necessary:

```
GMS.exe assignmentremind
```

When this shortcut is run, GMS will run the assignment reminder rules you've designated, and produce a log file with its actions. The file will be named `AssignmentReminders yyyy-mm-dd hh.nn.ss.log` where `yyyy` is the current year, `mm` is the month, `dd` the day, `hh` the hours (in 24-hour format), `nn` the minutes and `ss` the seconds. Even if no new reminders are generated, this log file will be created.

Notes

- You can run the tool as often as you want. GMS will not send out duplicates of the same reminder.
- GMS will prevent more than one copy of this tool from running at the same time.
- This tool generates the assignment reminders but does not deliver them. To have them sent on an automated basis, leave the Standalone E-mail Robot running. It will take these queued messages and deliver them where possible.

Command Line Reports

Concepts

Reports in GMS are normally run using the user interface. To generate reports on an automated basis, for example to e-mail the current day's assignment roster to department heads, you can use the command line to print reports to PDF files.

Important notes

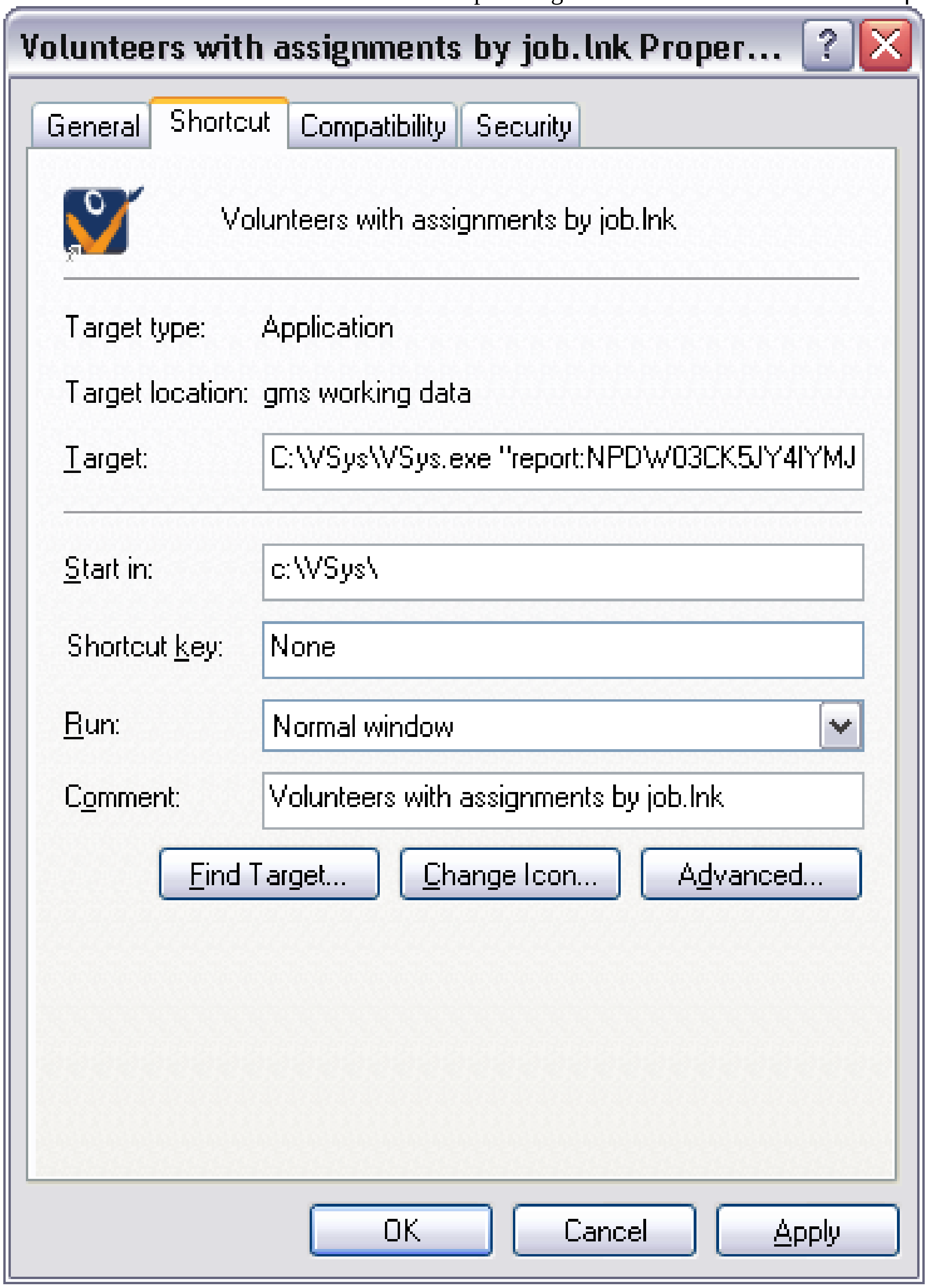
- Not all reports can be used this way, only those based on ***custom reports*** (page 118) and RTF assignment report calendars.
- To be used here, a report must first be saved within GMS. GMS uses the report's internal ID on the command line to uniquely identify it.
- You cannot change the conditions and filters on reports here. In the above example, to print the current day's assignments, you must save the report with filters that use ***relative dates*** (page 281).
- Changes made to the saved report affect all later uses of that report, even if the command line parameters are not updated.

Steps in This Task

1. From within GMS, find an eligible report in its usual location.
2. Click on the Properties hyperlink.
3. In the Report properties window, click on the Make a desktop shortcut to run this report hyperlink. If that link is not visible then this report is either not a saved report (built-in reports cannot be used directly; save them under a new name first) or is not eligible for use with this tool.
4. Enter the name of the file to be created. This is the PDF or RTF file that GMS will create when it runs the report. Click **Save**.
5. Once it has saved, it will tell you a shortcut has been created. Click **OK.**

6. From your desktop, double-click on the new icon to verify that the report you're looking for is generated as expected.

You now have a shortcut which will run this report. Right-click on the icon and select Properties to see its details.



For example,

```
    C:\GMS\GMS.exe "report:NPDW03CK5JY4IYMJ,C:\GMS\Individuals with assignments by job.pdf"
```

This runs the report with the internal ID code of `NPDW03CK5JY4IYMJ` and prints it to the file "`C:\GMS\Individuals with assignments by job.pdf".` Note: the quotes around the entire command are not optional.

Additional Options

- GMS allows any number of reports to be run on a single command line. Since starting GMS takes time, it can be more efficient to "stack" multiple reports into a single run. Using:
  ```
      C:\GMS\GMS.exe "report:NPDW03CK5JY4IYMJ,C:\GMS\Individuals with assignments by job.pdf" "report:43Y8OTR893GHJEQQ,C:\GMS\Assignment calendars.rtf"
  ```
  would run both of these reports to their respective files, one after the other.
- A report which generates no results (has no eligible people) will not create a file and will not affect any existing file.
- You can change the output filename to have it go anywhere you'd like that GMS has write permissions. You cannot change the file output format, though: GMS will always create PDF files for custom reports and RTF files for assignment calendar reports.
- GMS will always use the default database for running these reports.

Command Line SMS Results Retrieval

If SMS/text messaging is enabled, GMS can automatically retrieve incoming SMS messages as well as verify the statuses of sent messages. This can be done via a tool in the SMS Manager, or it can be run here via the command line.

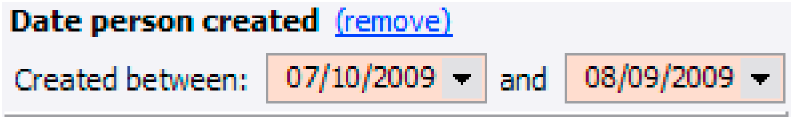
```
    GMS.exe smsresults
```

This tool does not send any messages, it just retrieves new incoming messages and the status of sent messages.

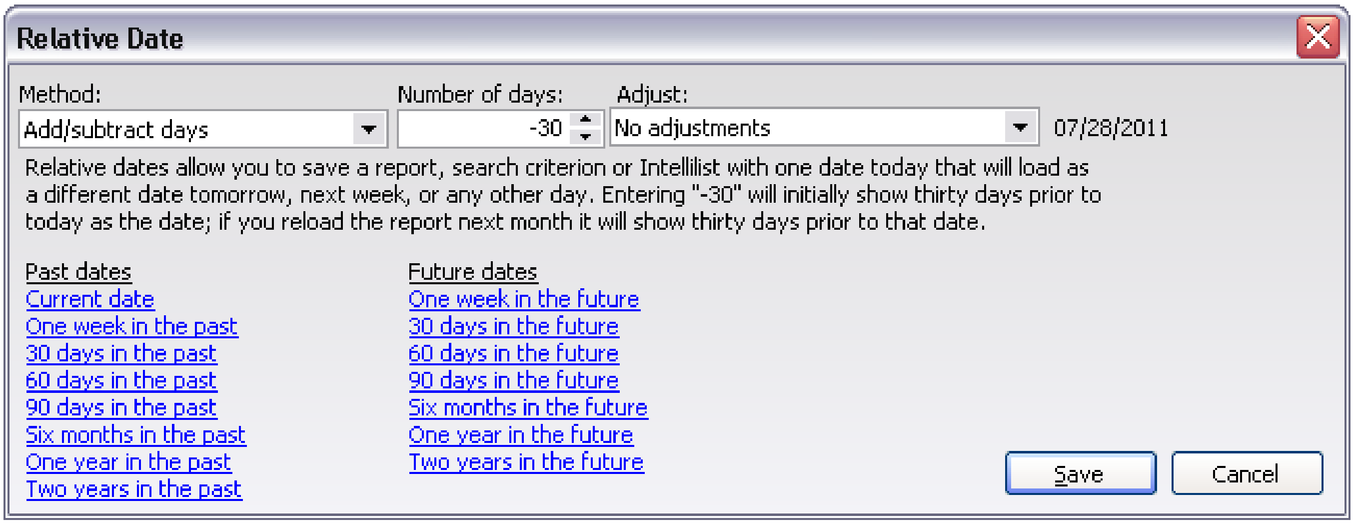
Relative Dates

Some date fields allow you to enter what are called relative dates. These dates are stored as offsets instead of fixed values. Why would you need these? Consider the example of a report from which you want all new Individuals in the last thirty days. You can save the report settings and run the report on the first of each month, but when you load the report, it will have as criteria the last dates that you used, not the dates that you want.

If we saved the report with these dates, 05/01/2009 and 05/31/2009, when we open them August, the report will still have those dates in it. If instead we used relative dates, in the example below to add/subtract days "-30" in the first field and add/subtract days "0" in the second, when we open the report on August 10th, it will show with dates relative to the current date. Note: date fields which hold relative dates show in pink to differentiate them from fixed dates.



When we open it on September 20th, the dates will show as August 21 and September 20. To enter a relative date, in a date field which supports it, right-click on the date field and select Relative, or just press the **R** key in the date field. You can use the hyperlinks (underlined in blue) to quickly assign values.



Four different Methods are available for setting the date relative to today: Add/subtract days, Add/subtract weeks, Add/subtract months and Add/subtract years. To always use the current date put in "0" as the "Number of days", otherwise select a method and enter a positive or negative value for the number of units to subtract from the current date.

After GMS adds/subtracts the appropriate number of time periods from the current date it can adjust that resulting date, too:

Adjust	Description
NO ADJUSTMENTS	GMS uses the date exactly as calculated above.
START OF WEEK	If the result date isn't a Sunday, GMS subtracts as many days as necessary to adjust the date back to a day which is a Sunday.
END OF WEEK	If the result date isn't a Saturday, GMS adds as many days as necessary to adjust the date forward to a day which is a Saturday.
START OF MONTH	If the result date isn't the 1st of the month, GMS subtracts days to go back to the first of the month the date is in.
END OF MONTH	If the result date isn't the end of the month, GMS adds days to get to the last day of the month the result day is in.
START OF QUARTER	If the result date isn't the 1st of the current quarter (January 1, April 1, July 1, October 1), GMS adjusts the result date back to the first of the quarter the date is in.
END OF QUARTER	If the result date isn't the last date in the current quarter (March 31, June 30, September 30, December 31), GMS adjusts the result forward to the end of the quarter the date is in.
START OF YEAR	If the result date isn't January 1st, GMS adjusts the date backwards to January 1st of the year the result date is in.
END OF YEAR	If the result date isn't December 31st, GMS adjusts the result forward to December 31st of the year the result is in.

START OF FISCAL YEAR	If the result date isn't the first date of a fiscal year, as determined by your organization's setup, GMS adjusts the result backwards to the first date of the fiscal year that the result is in.
END OF FISCAL YEAR	If the result date isn't the last date of a fiscal year, as determined by your organization's setup, GMS adjusts the result forward to the last date of the fiscal year the result is in.

To replace the relative date with a fixed one, just type any date into the field or erase the value from the field altogether.

Tip: Not all date fields support relative dates. In these cases the **R** key does nothing and neither does the right mouse button.

Notes on Banned People

When GMS is told to register someone into a Games, it first checks to see if that person is banned from participation. It does this in two stages:

1. Is this person explicitly banned, meaning that the BANNED checkbox in the Profile Editor is checked?
2. If not explicitly banned, does this person share common attributes with someone who is explicitly banned?

The first check is very quick and unambiguous - GMS will simply prevent you from registering this person under any circumstances, and this cannot be overridden without first marking the person as not banned.

The second is more complex. Does the person to be added have:

- The same phone number or e-mail address as a banned person?
- The same date of birth as a banned person?
- The same gender and family/last name as a banned person?

If any of these three are true, GMS will flag the person as being possibly banned. This won't prevent you from registering the person. Instead, GMS will prompt you to check to ensure that the person you're registering really is not banned. GMS does this to make sure that people who are banned and re-register again as a new person, either intentionally or accidentally, are less likely to get through your screening process.

Pure XML

GMS 6 can optionally share a database with GMS 5, which in turn is related to some much older versions of GMS (a long time ago; an office far, far away). When GMS 2 was being written in 1991(!), XML was barely an idea, let alone a standard. To store multiple chunks of data in a memo column, GMS uses what we internally label a "parameter list", basically one field per text line, with each line prefixed with the field name and a colon. For example:

```
awardSchedule:1
delegHierarchy:Y
gamesOwner:0000700000000000
hh.thresh:15
maxAge:0
minAge:8
NoBibs:N
ruleGroup:S
```

GMS only does this for tables which it and GMS have in common, otherwise it stores the data in XML.

```
<PARAMETERLIST>
 <PARAMETER NAME="awardSchedule" TYPE="string" VALUE="1"/>
 <PARAMETER NAME="delegHierarchy" TYPE="string" VALUE="Y"/>
 <PARAMETER NAME="gamesOwner" TYPE="string" VALUE="0000700000000000"/>
 <PARAMETER NAME="hh.thresh" TYPE="string" VALUE="15"/>
 <PARAMETER NAME="maxAge" TYPE="string" VALUE="0"/>
 <PARAMETER NAME="minAge" TYPE="string" VALUE="8"/>
 <PARAMETER NAME="NoBibs" TYPE="string" VALUE="N"/>
 <PARAMETER NAME="noReqVolAvail" TYPE="string" VALUE="N"/>
 <PARAMETER NAME="ruleGroup" TYPE="string" VALUE="S"/>
</PARAMETERLIST>
```

While both surely look like G(r)eek, the second is a standard data markup language which can be read by many different tools.

XML-ifying your data

GMS 6 can understand data stored in XML in all tables, not just the ones that it doesn't share with GMS 5. If you want that information stored in XML, and are sure that GMS 5 and older versions of GMS will not be connecting to this data, you can set the PureXML option. In your `GMS.ini` file, in the `[General]` section, add the entry `PureXML=1`. Where GMS would previously store data in parameter list format, it will now use XML. To convert existing data, use the Rebuild various lookup indices (page 193) tool under Administrator tools, then run it with the XML COMPATIBILITY FIELD UPDATES box checked.

Why would you do this?

Some users are directly querying the GMS database, bypassing GMS itself. Since other tools are very unlikely to support the parameter list format for data, having it in XML makes it substantially easier to query.

Caution: We do not support external tools which directly write to the GMS database. While we make no attempts to prevent it, doing so incorrectly may damage your data. Your support contract does not cover any work we'd need to do on your behalf to recover that data.

Special Settings

Exceptions/bug reports

When GMS encounters an unexpected internal or database error, it may show an "Issue report". The details of this report can be interpreted by the technical support team to determine what happened, and how to fix the problem. Normally GMS is set up to send these by e-mail, but in cases where that is not feasible (e.g. no e-mail client on the machine running GMS), GMS offers the ability to send them via a web connection. To enable this, within your `GMS.ini` file, make the setting:

```
[Exceptions]
Web=1
```

When submitting an issue report, GMS will make an HTTP connection (port 80) to the `http://bugreports.bespoke.com/GMS/bugreport` to post the report. If successful, the operator will get an e-mail confirming our receipt of the report, along with a URL that they can click on to see the report's details. By default, GMS includes a full screenshot with the report, and you can see that screenshot at that URL. If for privacy reasons or other reasons that screenshot should not be shown, it can be deleted here.

Stored passwords

When GMS remembers the login ID and password for a database connection, it stores it in the `GMS.ini` file. By default, that password is stored in plain text. To obfuscate that password to users able to view the contents of that file, GMS allows the password to be encrypted. In the `GMS.ini` file, make the settings:

```
[General]
PasswordHash=somevaluetheywontguess
```

This is not a hash. Hashes are not trivially reversible, and this must be reversible since the name used here is for backwards-compatibility purposes. Instead GMS encrypts the password with the value you provide and an internal (fixed) value, reversing that encryption in order to log on to the database.

Time synchronization

By default, GMS will synchronize its clock with the clock on your database server every few seconds. To disable this on SQL Server, make the entry:

```
[SQL Server]
NoSchedTimeSynch=1
```

For NexusDB, use [NexusDB] and for Oracle, [Oracle] as the header.

Backup version compatibility

When making GMS backups using NexusDB, GMS uses a special, fast mode which causes NexusDB to simply replicate the tables locally. Normally this is fine. But when making a backup of a database whose schema is of a later generation than the one on which the data will be restored, GMS will include in the backup those columns and tables which are part of the newer schema, but which will cause older versions of GMS to refuse to use the backup file. To eliminate this, make the entry:

```
[NexusDB]
NoFastBackups=1
```

This setting tells GMS to only copy columns and tables which it understands. This does not affect any databases stored in SQL Server or Oracle.

Memory Management

In version 1.5.5.4, a new memory manager was added to GMS to reduce memory fragmentation. To disable that memory manager, make the entry:

```
[General]
NoFastMM=1
```

Glossary of Terms

Alternate name

An alternate name is a second complete name for a person. This is most commonly used for nicknames, or the person's name in a different language and/or character set.

What it does for you	Lets you have two versions of the same person's name.
Where you'll find it	Within the the Personal data panel in the Profile Editor, click on the Other names link.
Need more?	See *Sounds like (phonetic name)* (page 293) for information on storing how the person's regular name sounds. The Alternate name field is only visible if the GMS administrator has enabled them. Do this within the Name setup options link on the Setup panel by checking the box ENABLE ALTERNATE NAMES..

Background check request

This is where you enter the background information about a prospective Individual. For automated requests - IntelliCorp, ChoicePoint/Lexis-Nexis - this is what gets sent to the background check vendor.

What it does for you	Lets you securely capture the information needed to run a background check on prospective Individuals.
Where you'll find it	In the Profile Editor, on the Background checks panel.
Do I need it?	If you pre-approve your Individuals by doing background screenings, yes.
General advice	Always create your background check ***encryption keys*** (page 184) before entering background check requests. This ensures that the information on these requests is encrypted and safe from unauthorized access.
How it works	Background check requests, appropriate for your organization, are entered for all prospective Individuals. If you have a contract with a supported vendor, GMS uploads the requests to the vendor and retrieves the results. The Individual screener checks these results and allows or disallows the Individual, entering a background check result for him.

Background check result

These are where you enter the results from background screenings on your Individuals.

What it does for you	Lets you securely capture the results of background checks on prospective Individuals.
Where you'll find it	In the Profile Editor, on the Background checks panel. You'll also create these when using the Request results handling link on the Applicant screening panel.
Do I need it?	If you pre-approve your Individuals by doing background screenings, yes.
General advice	Always create your background check encryption keys before entering background check requests, this ensures that the information on these requests is encrypted and safe from unauthorized access.

Bad phone number or e-mail address

A bad phone number or e-mail address is one which is in GMS but is known to be bad.

What it does for you	Lets you keep the bad phone number/e-mail address on file, while suppressing it from reports.
Where you'll find it	In any of the address phone number or e-mail address editors.
General advice	If a phone number is deleted because it's bad, another user may re-add that same bad value later from another form, not realizing that it's bad. By marking the phone number or e-mail address as bad, another user is less likely to re-enter it again.
Need more?	You can also use this to mark an e-mail address - or anything else in a phone number field - as known bad.
How it works	Right-click on the number/e-mail and choose Known Bad. The number/e-mail will turn red to indicate it is bad.

Banned

A banned person is one who is never allowed to participate with your organization.

What it does for you	Someone who is banned cannot be registered in any Games or given any job assignments. On all lists on-screen, these people show in red, bold text to distinguish them.
Where you'll find it	On most lists of people, a banned person will have his name displayed in red. Edit this value in the Profile Editor. Or from the View/edit banned people link on the Applicant screening panel.
General advice	Use this for people who fail background checks or have shown themselves to be otherwise unacceptable under any circumstances.
How it works	When registering someone in a Games, GMS will check to see if the person is banned, or if he matches any significant attributes of someone who is banned. People who are banned are locked out altogether. Those who match attributes of banned people result in the user being prompted to ensure that they are not the banned person.

Certifications

Certifications are a grouping of values which are stored together. Examples of certifications include TB test, Education/employment, General Release, General Medical Release, and Individual Experience.

What it does for you	Lets you attribute specific sets of information to people. You can filter people by the presence or absence of certifications, and whether or not they're expired.
Where you'll find it	On the Certifications panel in the Profile Editor.
General advice	Background check requests and results are also certifications. They're just shown in their own section of the Profile Editor separate from other types of certifications.
Need more?	Define your own in the Certifications tool from the Setup panel. Just like custom fields and reports, the certifications you define in GMS are just as good as the built-in ones.

Tip: IndividualWorks "reminders" usually become certifications in GMS.

Checked-in

A person who is checked-in is known to have shown up on-site. Checked-in is the opposite of scratched. While someone who is scratched is registered but did not show (or who is known to not be coming), someone who is checked-in actually arrived.

What it does for you	Lets you distinguish among people registered in a Games who is here and who is not coming.
Where you'll find it	On the list of people in a Games, a person's status is listed next to his name. Change this status by right-clicking on the person, or from the Games information panel in the Profile Editor.
Do I need it?	Maybe. If you are working with just day Individuals, this may not help you. Instead, you'll just credit Individuals with hours for the assignments they show up for. If you care about people getting into town to participate over several days, this may be the mechanism for you.
General advice	Checked-in is used more for people who are coming from a distance. It does not apply to individual job assignments, and does not mean that he stayed for the duration of the assignment or Games.
Need more?	A person cannot simultaneously be checked-in and scratched in the same Games.

Credential/Name tag/Badge

Credentials, name tags and badges are all the same thing: ID passes which identify Individuals and staff and allow them access to the appropriate places at your Games.

What it does for you	Prints these handy IDs, and tracks who has them.
Where you'll find it	Print them from the User tools panel within a Games, using the Name tags, badges and credentials link, or globally from the User tools panel. Right-clicking on a person in the Person Lookup tool will give you an option to print credentials. View the credentials printed for a person or print new ones from their Credentials panel in the Profile Editor.
General advice	Remember to save your credentials layouts after making changes when you're printing them. This lets you re-use the design and specifications later without re-entering anything.
How it works	After you print a set of credentials, GMS will prompt you to "Mark these as printed". If you do, GMS will put a note on the Credentials panel of every person that was printed.

Custom field

Custom fields are user-defined fields of different types. You can associate custom fields with different types of people, creating fields that GMS otherwise does not have.

What it does for you	Lets you create new fields that GMS doesn't have built-in for you.
Where you'll find it	See a person's custom fields on the Custom Fields panel in the Profile Editor. Define custom fields globally on the Setup panel using the Custom fields link. Define custom fields for a Games by right-clicking on the Games and selecting Setup (custom fields).
Need more?	See *Define Custom Fields* (page 213) for information on how to define your own custom fields.
How it works	Custom fields can be included in all kinds of reports, filters, mail merges and exports.

Deceased

Rather than deleting a person who has died and thereby losing all of his history, mark him as deceased. He will be suppressed from most reports and all mailings, but his past Games and historical data are preserved.

What it does for you	Suppresses the person from most reports and mailings, but keeps history in place.
Where you'll find it	In the Profile Editor, on the Personal data panel.
General advice	Eventually you will have participants who pass away. This helps ensure that you never send inappropriate mailings to people who have died.

Delegation

Delegations are the Games equivalent to groups. All people registered in a Games are in delegations, and delegations organize people together within Games.

Where you'll find it	Next to every person in a Games and on their reports. When assigning people to a Games. When creating a new Games.
General advice	Make your delegations in ways that reflect how people in your Games are organized.

Encryption

Encryption is the process of encoding data so that it can be read only by the intended audience. The encryption system in GMS uses two keys, an encryption key, available to anyone and stored in the database, and one or more decryption keys which are private and allow their holders to decode the data.

What it does for you	Secures certain parts of your data from unauthorized access, while allowing any user to enter data.
Where you'll find it	In background check requests and results, as well as (optionally) in Athlete Medical certifications.
Do I need it?	If you store any private information in background check requests or results, absolutely!
Need more?	See the section *Create and Manage Data Encryption* ***Keys*** (page 184) for a thorough description of how GMS manages encryption.

Known bad address

A known bad address is one associated with a person, but one you know is not a valid address.

What it does for you	Lets you keep the bad address on file without actually using it. This lets you avoid re-entering the same bad address again later, but still know that this address is bad. In the address editor, change the status link at the top of the address to Invalid.
General advice	Use this instead of deleting an address until you've gotten a known good one to replace it.
Need more?	See *Bad phone number* (page 288) for a similar concept applied to phone numbers and e-mail addresses.
How it works	Known bad addresses will not be used on reports and in mailings.

List

Lists are collections of people used for mailings and many other things. There are three types of lists: standard lists, temporary lists and Intellilists. See the glossary entry on *Intellilist* for more details on how to use these automatic lists.

What it does for you	Lets you collect people together for many purposes.
Where you'll find it	List manager/Intellilist setup on the User tools panel either globally or within a Games.
General advice	Add people to lists from the list manager, by right-clicking on the person, by right-clicking on selected groups of people within a Games, within the Profile Editor, or myriad other places. Temporary lists are great for "tagging" people for some purpose, for example a report: put them all on a temporary list, run your report, and the next time GMS is restarted the list is gone.
How it works	A person is put on standard lists manually and stays there until removed.

Master decryption key

Master decryption keys are created at the same time that the encryption keys are created. These are generally used only by supervisors as they cannot be revoked later.

What it does for you	These allow authorized users to access encrypted data but are generally not given to end-users.
Where you'll find it	On a USB thumb drive! Never store master decryption keys on a hard drive or network - that would completely defeat their security.
General advice	A copy of each master decryption key should always be stored off-site for safety. Don't give out copies of the master decryption keys - they can't be revoked, so anyone who has one can use it forever.
Need more?	See the section *Create and Manage Data Encryption Keys* (page 184) for a thorough description of how GMS manages encryption.
How it works	Whenever a user tries to access encrypted data, he will be prompted to insert a decryption key.

Passphrase

The passphrase is part of securing your user decryption key. Every user decryption key, which is what you'll use to access encrypted data, is protected by a passphrase. When you try to use that decryption key, you'll have to type in that passphrase.

What it does for you	Protects your user decryption key from being used by unauthorized users.
Where you'll find it	Whenever you use your user decryption key, GMS will prompt you for the passphrase.

Person type

This is the person's overall type(s) in GMS. A person may have additional types, but at least a primary type is required.

Where you'll find it	A person gets his type when he's created on the Create a new person window, and it can be edited on the the Personal data panel of the Profile Editor.
Do I need it?	Everybody must be assigned a person type.
General advice	Person type and role are different: person type is global, that is it's assigned to a person and doesn't change from one Games to another. Role is what the person is within a Games, and this can be different from Games to Games. For example, a person who is globally identified as Staff may be registered as a Individual in a

	Games.
How it works	If a person has multiple types, any additional types can be added in the ADDITIONAL TYPES field in the Profile Editor.
Need more?	The person's primary type corresponds to the PERSON TYPE field in GMS. GMS does not recognize any additional types which may be assigned to people.

Relationships

Relationships are used to indicate how people and groups are connected to one another. From within the Profile Editor you can see all of the people someone is related to.

What it does for you	Connects people together both globally and within a Games.
Where you'll find it	On the Relationships panel within the Profile Editor and Group editor. You can hide relationships that are irrelevant to you on the Advanced panel on the System Preferences screen in Setup.
General advice	When you've defined a relationship for someone, GMS shows that relationship on both people's screens. This means that if under "Jane Doe" you show that "Jimmy Doe" is her son, on Jimmy's screen, you'll see "Jane Doe" listed as his parent.

Relative date

A relative date is one that's stored not as a fixed date, but rather one relative to the current date.

What it does for you	Lets you save a set of criteria, e.g. "Everybody with a Individual Medical expiring in the next 30 days", and then use it without having to go back in and update the criteria every time you use it.
Where you'll find it	In many date fields, especially those in filters and reports. Right-click on the date field to access the relative date editor, or just press the **R** key in that field.
General advice	Use them. Love them!
How it works	Whenever the report, criteria or other associated value is loaded, a relative date field will come up with the current date plus or minus the offset you've entered.

Role

This is the part that a person plays in a Games. It can be the same value as the person's type, but can just as well be a different value.

What it does for you	Differentiates the major functions of people within a Games.
Where you'll find it	On lists of people in a Games, each person's role is listed next to his name. You select a person's initial role as you register him in the Games. You can edit the role by right-clicking on the person, or in the Profile Editor within the Games on the Games information panel.
Do I need it?	Every person in a Games is assigned a role.
General advice	Changing a person's type does not affect his role in any Games, and changing a person's role in one Games does not affect his person type or his roles in other Games.
Need more?	A person has only one role in a Games, unless he's registered in multiple delegations, in which case he may have a different role in each delegation.

Scratched

A person who is scratched is known to have not shown up on-site, or is known to not be coming. This is the opposite of checked-in.

What it does for you	Lets you distinguish among people registered in a Games who is here and who is not coming.
Where you'll find it	On the list of people in a Games, a person's status is listed next to his name. Change this status by right-clicking on the person, or from the Games information panel in the Profile Editor.
Do I need it?	Definitely. If someone calls ahead of time and says they're not coming, marking him as scratched leaves him in the Games, but marked as not coming (and puts a line through his name). Unlike deleting the person, you can un-scratch him if he changes his mind, and you can run reports of who's scratched.
General advice	Scratched does not apply to individual job assignments. If a person is scratched, all job assignments are scratched, otherwise none are scratched.
Need more?	A person cannot simultaneously be checked-in and scratched in the same Games.

Shared address

Every person in GMS usually has their own address or addresses. Shared addresses let you tell GMS that some people live or work together, and this lets you send just one copy of a mailing to everyone in a household, e.g. a "Save the date" postcard for an upcoming event.

What it does for you	Lets you send single copies of some mailings to multiple people at one address to save money.
Where you'll find it	In most address editors.
Do I need it?	Definitely!
General advice	Pair wives and husbands, children and mothers-in-law together with a common address. Changing that address for one person changes it for all.

Sounds like (phonetic name)

Fields in GMS 6 used to supply a hint on how to pronounce a person's name.

What it does for you	Helps members of your organization learn how to say the person's name correctly. This is especially helpful with uncommon names.
Where you'll find it	Create new person window, as well as from the Other names link on the Profile Editor screen.
Do I need it?	Only use this when you need it, generally for people whose name is hard to pronounce or is often mis-pronounced
General advice	If you enter a phonetic name, you must complete the LAST/FAMILY NAME. If you only need a pronunciation hint for a person's first name, you still need to enter the family name.

Sport

A physical or intellectual activity that is governed by a set of rules or customs and often engaged in competitively.

What this does for you	Lets you associate jobs with sports, acting as a tie between the sports in GMS and the jobs in GMS 6.
Where you'll find it	An attribute of a job in the Job Editor. You can filter jobs and assignments based on their sport.

Do I need it?	If you are working with competitive events, especially combined with GMS, this is useful.

Status

The status of a person can be tagged. An active Individual is one who is Individualing. A person who is inactive is one who is not currently participating or is not likely to participate in the near future for some reason. Prospective or Applicants may also be given their own status.

What it does for you	Mark people's status to suppress them from most mailings and some reports. The names or inactive peopke show in gray in the Person Lookup tool.
Where you'll find it	In the Profile Editor, on the Personal data panel.
General advice	Your organization will have its own rules as to how to best use this field, but generally you'll use it as described here.

Tracing

Tracing is a mechanism that GMS uses to "trace" changes made by users - tracing records form the audit log of all of a user's activities.

What it does for you	When enabled, lets you see what has been done to a person or some other objects.
Where you'll find it	Right-click on an element and select See tracked changes. Enable tracing by going into System Preferences under the Setup panel, then on the Feature enabling panel, check ENABLE TRACING.
Need more?	See *Purge Old Trace Records* (page 191) for information about clearing out unneeded tracing data.
How it works	Whenever a change is made to a person or object, if tracing is enabled, GMS puts a record in the "trace" table.

Training

Training helps you track what classes your Individuals have taken, and thereby the skills you know you've given them. Jobs can have required trainings associated with them, helping to prevent someone from being assigned that job until he's taken the appropriate training.

Where you'll find it	Set up training using the Training courses, Training instructors and Training subjects links on the Setup panel. Use the Training courses and results or Training manager links on the User tools panel to track who came and their results. View and edit an individual's training in the Training panel of the Profile Editor.
General advice	Taking a training but getting a STATUS of "Failed" will not allow a Individual to be assigned a job which requires that training. Giving a STATUS of "Pending" is usually used when the class hasn't yet been given or the results are not yet known.
Need more?	Also see *Training Subject (page 232) , Training Instructors (page 235)* and *Training course* (page 233).
How it works	Training is organized into subjects, and then into courses (classes) within that. Individuals can be signed up for trainings and receive grades as well.

Training course

A course is an instance of a training, for example, a specific class given on Friday, April 13th.

What it does for you	Lets you organize individual classes when teaching a specific subject.
Where you'll find it	Set up courses under Training courses on the Setup panel and in the various training tools.
General advice	Set up courses to match the actual classes you're giving.
Need more?	Also see *Training* (page 294) and *Training subject* (page 232).
How it works	Training is organized into subjects, and then into courses (classes) within that. Individuals can be signed up for trainings and receive grades as well.

Training subject

In training, a subject is what the training course is all about. For example, "First Aid", "General Orientation", and "Security" are good subjects.

What it does for you	Training lets you track what classes your Individuals have taken, and thereby the skills you know you've given them. Jobs can have required trainings associated with them, preventing anyone from being assigned that job until he's taken the appropriate training.
Where you'll find it	Set up subjects under Training subjects on the Setup panel.
General advice	Define your course training subjects to match the types of training your organization offers or requires. If someone else is doing the training, for example the Red Cross, you can still track that training in your own data.
Need more?	Also see *Training* (page 294) and *Training Course* (page 233).
How it works	Training is organized into subjects, and then into courses (classes) within that. Individuals can be signed up for trainings and receive grades as well.

User decryption key

User decryption keys are given to end users for accessing encrypted background check requests and results, as well as other encrypted certifications.

What it does for you	Given to authorized users, they allow these users to access the encrypted data. These decryption keys can also be revoked later if the user leaves the organization, making the key useless even if the USB thumb drive it's stored on is never returned.
Where you'll find it	On a USB thumb drive! Never store these or master decryption keys on a hard drive or network - that would completely defeat their security.
General advice	User decryption keys are protected by passphrases. Without the passphrase, the key can't be used.
Need more?	See the section *Create and Manage Data Encryption Keys* (page 184) for a thorough description of how GMS manages encryption.
How it works	Whenever a user tries to access encrypted data, he will be prompted to insert a decryption key.

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