Data Migration to GMS

Moving your Programs Athletes, Coaches, Family members and Volunteers to GMS is not a complicated process, but it does take a little planning and preparation. If your programs information is in a spreadsheet, you can import this data into GMS. You need 4 basic items for each person, these are: **Group** – this is the school or local Program name

The Group name can be set up using hierarchical naming. This means you can associate the group to a Area\Region\State\Province\city; then to the local School or Program. Example Area 32

Prince Williams County

Jefferson High School

Using the hierarchical names allows you to better group your programs for reporting.

<u>Name</u> – the name can be formatted a number of ways; Example Jane Ellen Smith can be formatted as: Jane Ellen Smith – all in one column (Name natural) Smith, Jane Ellen – all in one column (Name backwards) Jane Ellen Smith – Each name part in its own Column (Name First, Name Middle, Last Name)

Date of Birth (DOB) – the date of birth can be formatted MM/DD/YYYY or DD/MM/YYYY or YYYY/MM/DD

Person Type – Person Types Supported in GMS

A-HOD	Technical Delegate
Assistant Coach	Unified Athlete-C (Competitive)
AS-Staff	Unified Athlete-PD (Player
Athlete	Development)
Athlete in Training	Unified Athlete-R (Recreation)
Coach	Unified Coach
Family member	Unified Partner
Guest	Unified Partner-C (Competitive)
Head Coach	Unified Partner-PD (Player
HOD	Development)
Media	Unified Partner-R (Recreation)
Medical	VIP
Official	Volunteer
Security	Young Athlete
Staff	
In addition to the above listed Types,	
there are 10 "Other" names that can	
be created for local needs.	

We've developed a simple excel templates that can be used for importing you data into GMS, use the link to down load the excel spreadsheet.

https://www.dropbox.com/s/3oc97xpgmg8o28h/Data%20Registration%20Template.zip?dl=0

Getting GMS ready to import People

- 1. Set up your Groups in GMS. GMS needs to know where to put the people you are importing. Note: you can import the Group Names from an excel spreadsheet. Please contact SOI for assistance.
- 2. The add Groups, click on Setup, the Groups.

QMS 7 (64 bit)				Special Officer
GMS 7.5.3 (build #152) Qi Online videos * About GMS 7 (64 bit)	Person lookup/data entry			+
NOnline videos	Games: (none)			
CROWN OF DIVISION OF DRIV	Applicant screening			
ecial tools	Reports			*
User preferences	GMS Transfer			•
OND 7 (46 bit) OND 7 (4	User tools			+
	Administrator tools			55
	Setup			•
1	Option	Category	Description	
	System preferences	General	Various display options, definults, international settings, and others.	5
	Archived reasons	Options	Reasons that people are archived.	
	Samed reasons	Options	Reasons that people are banned.	
	Certification, background check hints	Advanced	Define the hints which appear over people based on their background check and/or certifications.	
		Advanced	Definitoria, hinta, expiration rules and hints for certifications.	
	Contact fags	Options	Labels for individuals to prevent unwanted contacts.	
	LE Custom fields	Fields and forms	Custom fields let you create new fields to attribute various types of data with people.	
	Games groups	Options	Set up groupings for games to organize and filter them.	
	Croups	Options	The groups, companies, organizations, etc. into which people are organized	
	👷 Inactive reasons	Options	Reasons that people are inactive.	
	Label types	Letters	Label layouts for basic maling labels and those privited after a mail merge.	
	Location manager	Options	Locations for games, jobs and slots.	

3. Either click on "Add new" located under Tools or just Right click in the area below Group manager, then click Add, the Group.

GMS 7 (64 bit) > Groups manage	<u> </u>	Back
Tools 🖉	3 Group manager	
Filter types	iame 🔺 Group type Abbreviated	
Setup group types	Add Company View Group	
	Ide Seepeple	
	Change type	

- **4.** In the Name Filed enter the Name of the Group (Local Program). The Group name <u>MUST</u> match the name that is in the file your data file you want to import. The Name is the only required field that needs to be completed.
 - Abbreviated Name You can use this field if the Local Program (Group) has a nickname. This field is available on reports.
 - Primary language This is the Primary Language of the Program
 - Other Languages spoken allows to select any additional languages
 - Group Kind Used if you have identified different Group Types
 - Parent group this is where you associate the Local Program to a hierarchical name

Status Secondario Name: Abbreviated name: Status Secondario Pinary language: Office languages sociate: Tools Orang land Pinary language: Office languages sociate: Tools Orang land Pinary language: Office languages sociate: Relationations Orang land Pinary language: Pinary language: Relationations Orang land Pinary language: Pinary language: Relationations Pinary language: Pinary language: Pinary language: Relationations Pinary language: Pinary language: Pinary language:	Group properties	a Basic specifications						- 10	
Addresses Primary language: Other languages socient: Tools Cracp land V Cracp land V Vent gracp: Relationships Relationships	Basic specifications	Name:		Abbreviated name:					
Torols Onup lind Partity on gr. Set as and/or Partity on gr. Set as and/or Partity on gr. Set as and/or Partity on gr. Relationships Relationships	Addresses	Primary language:		Other languages so	oken:				
Caso V V	Tools	Group kind	7	Parent group:					
Relationships Relationshi	Con proper	Group		•		•			
Relationship Notes									-
		Relationship Notes							
Addresses Add an address		Addresses	Add an add	less					•

5. Using the Interactive File Importer(IFI) to create your basic Groups in GMS, requires an excel spreadsheet with the following columns identified:

Colum Header

Owner – Blank

Name – The Name of the Local Program or school

Action – Must have a C, this tell GMS to "create" the Name

Processed – will let you know if the record was imported True = Import False = not Imported Processing Log – lets you know if the record was created or gives you the error with the record. Group Type - Group

	Α	В	С	D	E	F	G
1	Owner	NAME	Group Type	Action	Processed	Processing Log	
2		Actonville Training Centre	Group	c			
3		Albertina Sisulu Special School	Group	с			
4		Alexandra Hospital	Group	С			
5		Alta Du Toit Aftercare	Group	С			
6		Alta Du Toit School	Group	С			
7		Anastacia Pre-School & Daycare	Group	С			
8		Avuxakeni Hospital	Group	С			
9		Bana Ba Thari Special School	Group	С			

6. The interactive File importer is located under User Tools, click on Interactive File Importer.



7. Under Import task, select Add/update groups globally



8. If you need to import additional items to Groups, click on "Print valid fields report", this will give you a list of everything associated to Groups.

Under File to import, click on the local icon, this opens the browse feature so you can file the file you want to import.

🖞 GMS 7 (64 bit)				
GMS 7 (64 bit) > Interactive Fi	ile Importer			88888888
Settings	1	遇 File to be imported		
Module-specific options O Load settings Save settings		Import task: Add/update groups globally	File to import:	
Tools Reload file Clear "Processed" field Print valid fields report	Ł			

9. All of the Field Names should be mapped, it is strongly recommend you run the IFI is test mode first, this will let you know if there are any errors in the file you are importing.



10. Even in test mode a reported is generated letting you know what the importer has done. Note in Test Mode, no changes to GMS are being made.

Page 1 of 14		File Importer (TEST MODE)	12/05/2016 11:16
\\file01\users\$\rs	silva\Desktop\Sample	Group Import.xls	
Actonville Training	g Centre		0
Create Creating new group "	Group importer Actonville Training Centre'.		
Albertina Sisulu Sp	pecial School		1
Create Creating new group "	Group importer Albertina Sisulu Special School".		
Alexandra Hospita	d .		2
Create Creating new group "	Group importer Alexandra Hospital".		
Alta Du Toit Aftero	are		3
Create Creating new group "	Group importer Alta Du Tolt Aftercare''.		
Alta Du Toit Schoo	ol		4
Create Creating new group "	Group importer Alta Du Tolt School".		

11. If everything looks good, uncheck Test mode and click run, at the bottom of the screen you will see a status bar, it will take GMS less than 30 seconds to import a file with 250 Groups.

😲 GMS 7 (64 bit)		
<u>GMS 7 (64 bit)</u> > Interactive File Importer		TTTTT
Field matching Auto-match fields Verify field matches	Ja File to be imported Import task: Add/update groups globally	File to import: V)\\file01\users\$\rsilva\Desktop\Sample Group Import.xls
Settings Module-specific options Load settings Save settings	Field mappings Field name Becomes fields Owner Owner Add NAME Name (Group) Add Action Counter Add	
What to import: Custom fields: Enabled Group: Enabled	Processed Processed Add Processing Log Processing log Add	
Tools Reload file Clear "Processed" field Print valid fields report		
	Group	
	49%	Run Test mode Cancel
GMS 7.5.3.152 x64; Back-end: NexusDB; Ini	file:C:\GMS 7_64 Bit\GMS7.ini; Server addres	s: "C:\GMS GROUPS"

12. Review the spreadsheet, for errors, in the example below Beacon School was listed twice, GMS only imported the first one, because it won't allow for duplicated Groups names, unless they are associated to different parent (hierarchical) organization.

	A	8	C	D	E	F	G	H		1	ĸ	L	M	N	0
1	Owner	NAME	Group Type	Action	Processed	Processing Log									
2		Actonville Training Centre	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Actonville	Training C	entre".Cha	nging group	type to "	Sroup"
3		Albertina Sisulu Special School	Group	С	TRUE	Create/Group in	mporter: C	reating nev	w group '	Albertina S	isulu Speci	ial School".	Changing g	roup type	to "Group"
4		Alexandra Hospital	Group	С	TRUE	Create/Group in	mporter: O	reating nev	w group '	Alexandra	Hospital".(Changing g	roup type to	"Group"	
5		Alta Du Toit Aftercare	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Alta Du Toi	t Aftercare	".Changing	group type	to "Group	· ·
6		Alta Du Toit School	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Alta Du Toi	t School".0	hanging gr	oup type to	"Group"	
7		Anastacia Pre-School & Daycare	Group	с	TRUE	Create/Group In	mporter: C	reating nev	w group '	Anastacia P	re-School	& Daycare	.Changing	group type	to "Group"
8		Avuxakeni Hospital	Group	С	TRUE	Create/Group in	mporter: O	reating nev	w group '	Avuxakeni	Hospital".	Changing g	roup type t	o "Group"	
9		Bana Ba Thari Special School	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	'Bana Ba Th	ari Special	School".Ch	anging gro	up type to	"Group"
10		Bangwanate Disabled Project	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Bangwanat	e Disabled	Project".0	hanging gro	oup type to	o "Group"
11		Beacon School	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Beacon Sch	ool".Chan	ging group	type to "Gr	oup"	
12		Beacon School	Group	с		Error/Group im	porter: Car	nnot create	new gro	up "Beacon	School" -	one alread	y exists wit	h that nam	ie.
13		Bel Porto School	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Bel Porto S	chool".Cha	inging grou	p type to "	Group"	
14		Bele School	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Bele Schoo	I".Changin	g group typ	pe to "Grou	p"	
15		Benedict & Hope	Group	C	TRUE	Create/Group in	mporter: C	reating nev	w group '	Benedict &	Hope".Ch	anging gro	up type to '	Group"	
16		Benedict & Hope Special School	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Benedict &	Hope Spe	cial School	.Changing	group type	e to "Group"
17		Bet El School	Group	С	TRUE	Create/Group in	mporter: C	reating nev	w group '	Bet El Scho	ol".Changi	ng group t	pe to "Gro	up"	
18		Bet-El School	Group	с		Error/Group im	porter: Car	nnot create	new gro	up "Bet-El :	School" - o	ne already	exists with	that name	h
19		Bethesda Special School	Group	C	TRUE	Create/Group in	mporter: C	reating nev	w group '	Bethesda S	pecial Sch	ool".Chang	ing group t	ype to "Gr	oup"
20		Blouvlei School	Group	с	TRUE	Create/Group in	mporter: C	reating nev	w group '	Blouvlei Sc	hool".Cha	nging group	p type to "G	roup"	

13. Now when you go back to Setup, and Groups you will see all of the Groups that you just imported.

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GMS 7 (64 bit)			
<u>GMS 7 (64 bit)</u> > Group	s manager		Diympics
	29. Group manager		ack
Add new	News	Course have Althoughted	
Filter types	Astaniila Taisina Casta	Group type Abbreviated	
Evpand all	Acconvine Training Centre	Group	-
Setup group types	Albertina Sisulu Special School	Group	0
	Alexandra Hospital	Group	
	Alta Du Tolt Aftercare	Group	
	Anta Du Tolt School	Group	
	Anastacia Pre-School & Daycare	Group	
	Avuxakeni Hospitai	Group	
	Bana Ba Thari Special School	Group	
	Bangwanate Disabled Project	Group	
	Beacon School	Group	
	Bel Porto School	Group	
	Bele School	Group	
	Benedict & Hope	Group	
	Benedict & Hope Special School	Group	
	Bet El School	Group	
	Bethesda Special School	Group	
	Blouvlei School	Group	
	Bogwasha Special School	Group	
	Boikano Project	Group	
	Boipoloko Stimulation Centre	Group	
	Boiteko Special School	Group	
	Bokamoso Creche	Group	
	Bokoni	Group	
	Bona Lesedi Special School	Group	
'A	Bonabathani	Group	
	Bophelong Multi Disability	Group	
-	Byletts Centre	Group	
	Capestar Fish Swimming Club	Group	
	Carpe Diem School	Group	
45 shown	Casa Do Sol School	Group	

14. Now that you have your Groups (local Programs) in GMS you are ready to import People. It is recommended that the first few times you Import People, work with small files, maybe 100 People. Make sure your import file has these columns: Owner, Processed and Processing Log. Click on User Tools, then Interactive File Importer.



15. Under Import Task select "Create\update people

🝸 GMS 7 (64 bit)		
GMS 7 (64 bit) > Interactive File Importer		Special Olympics, Inc.
Settings	Ja File to be imported	
Module-specific options	Import task:	File to import:
Save settings		
Jure seconds	Add/remove people	-
	Add/update training registrations and results	
	Add/update groups globally	
	Add/update locations	

16. Locate the file you want to import, using the browse button .

You will need to map all fields that has "Add" without any additional fields (Highlighted in Yellow). In the example below, the following fields will need to be mapped: Local Program, Address 1, Address 2, Province/State, Sport (M01) and Sport (M02).



17. To map the fields you will need to understand the relationship. Example Local Program is the Group, which is related to People. Click on Add next to Local Program, since Local Program is the Group, and Groups are related to People, now click on people, then click on Group.

Data Migration to GMS

CMS 7 (64 bit)	eam Email 🔻 Done	Maria Dulas C	Action	K
GMS 7 (64 bit) > Interactive File Importer	RRR	2222	Additional groups Additional person types	, In
Field matching Auto-match fields Verify field matches	Ja File to be imported Import task: Create/update people	File to impo	Group Group's parent Nationality New comment	P
Settings Module-specific options Load settings Save settings	J Field mappings Field name Owner First Name	Becomes fields Owner Add Names: First name (People) First r	Passport exp date Passport number Photo ID verified	
What to import: Addresses: Enabled Certifications: Enabled Custom fields: Enabled Entrant images: Enabled Lists: Enabled	Middle Name Family Name Gender DOB Person Type Country Local Program	Names: Middle name (People) Midd Names: Family/last name (People) Basics: Gender (People) Gender (F Birth date: DOB (People) DOB (Per Basics: Person type (People) Type Home: Country (Addresses) Add Ad	Security disabled Security disabled Visa number Visa required	
Person lookup: Enabled Tools Reload file Person lookup: Enabled Tools Reload file Pint valid fields report	Address Line 1 Address Line 2 City Province/state Postal Code Email Home Phone	Ac Owner Ac Processed Hc Processing log Ac Addresses E- Certifications Hc Entrant images	Aierts Banned Basics Birth date Names Other	> > > <u>Add</u>
	Work Phone Sport - (W01) Competition Sport - (M02) Training Processed Processing Log	W Lists Ac People Ac Person lookup Pr Person lookup	Other names Status)
GM5 7.5.3.152 x64; Back-end: NexusDB; Ini-	file:C:\GMS 7_64 Bit\GMS7.ini;	Run [Server address: "C:\GMS GROUPS"	₹ Test mode	

18. Repeat the process for all the Fields that have Add., this the example for Address Line One, select the address type and then Line 1.



19. Once all of the fields are mapped, you should see something that looks like this

😲 GMS 7 (64 bit)		
<u>GMS 7 (64 bit)</u> > Interactive File Importer		PPPPPPPPPP
Field matching Auto-match fields Verify field matches	File to be imported Import task: Create/update people	File to import: ▼ \\file01\users\$\rsilva\Desktop\Program Registration Temp 🍋
Settings Module-specific options. Load settings Save settings	Field mappings Field name Owner First Name	Becomes fields Owner Add Names: First name (People) First name (Person lookup) Add
What to import: Addresses: Enabled Certifications: Enabled Custom fields: Enabled Entrant images: Enabled Lists: Enabled People: Enabled Person lookup: Enabled	Mindae Name Family Name Gender DOB Person Type Country Local Program Address Line 1 Address Line 2 City	Names: Finde name (People) Middle name (Person lookup) Add Names: Family/Ast name (People) Family name (Person lookup) Add Basics: Gender (People) Gender (Person lookup) Add Birth date: DOB (People) DOB (Person lookup) Add Basics: Person type (People) Type (Person lookup) Add Home: Country (Addresses) Add Group (People) Add Home: Line 1 (Addresses) Add Home: Line 2 (Addresses) Add Home: Line 2 (Addresses) City (Person lookup) Add
Tools Reload file Clear "Processed" field Print valid fields report	Province/state Postal Code Email Home Phone Mobile Phone Work Phone Sport - (M01) Competition	Home: State (Addresses) Add Home: Zip/postal (Addresses) Postal code (Person lookup) Add E-mail address (Addresses) Home: E-mail (Addresses) E-mail (Person lookup) Add Home phone (Addresses) Home: Home phone (Addresses) Add Mobile phone (Addresses) Add Work phone (Addresses) Home: Work phone (Addresses) Add Census: Competition 2016 (Certifications) Add
GMS 7.5.3.152 y64: Back-and: NewsonRt Toil-R	Sport - (MO2) Training Processed Processing Log	Census: Tompetudin 2010 (Certifications) Add Processed Add Processing log Add Run Image: Test mode Server address: "C'IGMS GROUPS"

20. Now that all of the fields are mapped, click on Run. You should do this is Test Mode the first time just to see if there are any errors. If no errors appear, uncheck Test Mode and then click Run.

NOTE: this process cannot be undone, so it is a good idea to do a backup of your data before you do the Import.

If you have errors with the import, please contact <u>GMSHelp@specialolympics.org</u> Please send the Spreadsheet you where importing, this will help us isolate the problem.