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.

Name – 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 Development)
Athlete	Unified Athlete-R (Recreation)
Athlete in Training	Unified Coach
Coach	Unified Partner
Family member	Unified Partner-C (Competitive)
Guest	Unified Partner-PD (Player Development)
Head Coach	Unified Partner-R (Recreation)
HOD	VIP
Media	Volunteer
Medical	Young Athlete
Official	
Security	
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

Data Migration to GMS

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.

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

4. In the Name Filed enter the Name of the Group (Local Program). The Group name **_MUST_** 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
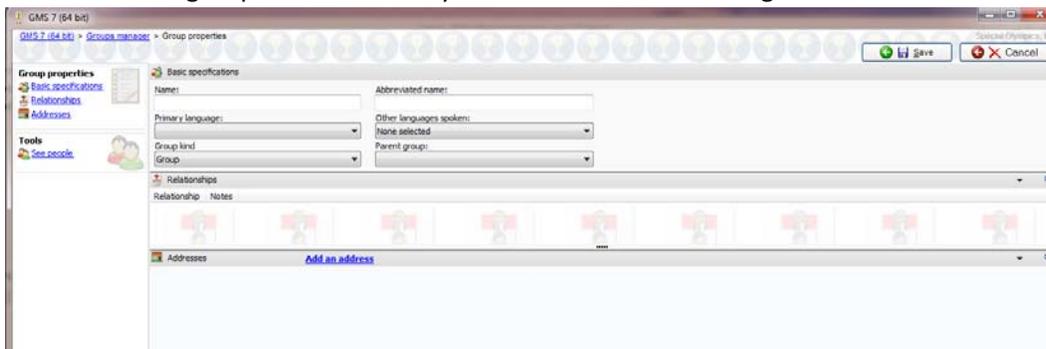
5. Using the Interactive File Importer(IFI) to create your basic Groups in GMS, requires an excel spreadsheet with the following columns identified:

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

	A	B	C	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	C			
4		Alexandra Hospital	Group	C			
5		Alta Du Toit Aftercare	Group	C			
6		Alta Du Toit School	Group	C			
7		Anastacia Pre-School & Daycare	Group	C			
8		Avuxakeni Hospital	Group	C			
9		Bana Ba Thari Special School	Group	C			

6. The interactive File importer is located under User Tools, click on Interactive File Importer.
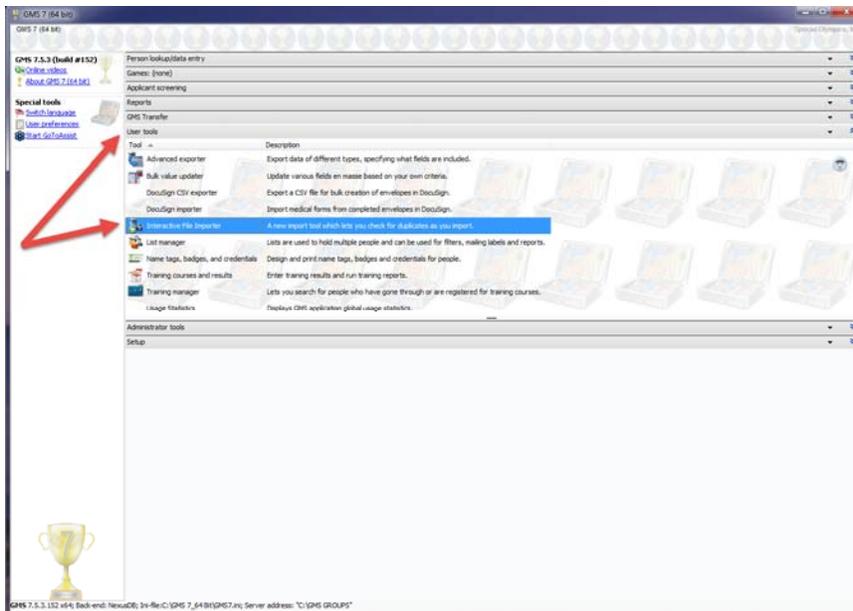
7. Under Import task, select Add/update groups globally
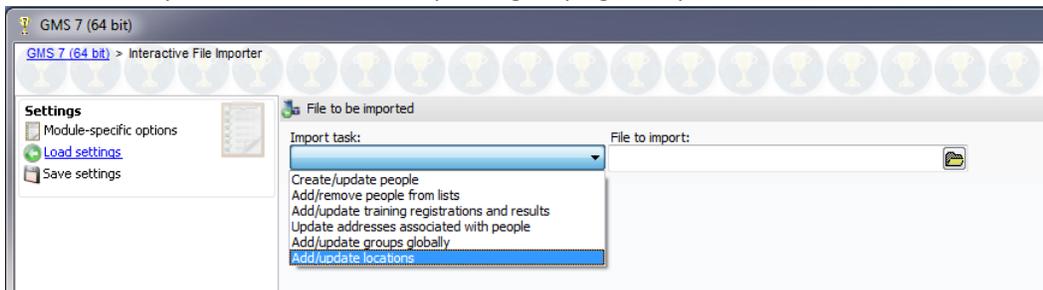
8. If you need to import additional items to Groups, click on "Print valid fields report", this will give you a list of everything associated to Groups.
    Under File to import, click on the 📂 icon, this opens the browse feature so you can file the file you want to import.
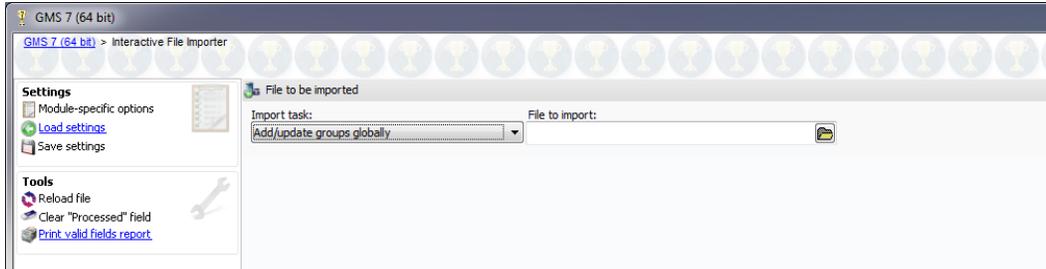
9. All of the Field Names should be mapped, it is strongly recommend you run the IFI is test mode first, this will let you know if there are any errors in the file you are importing.
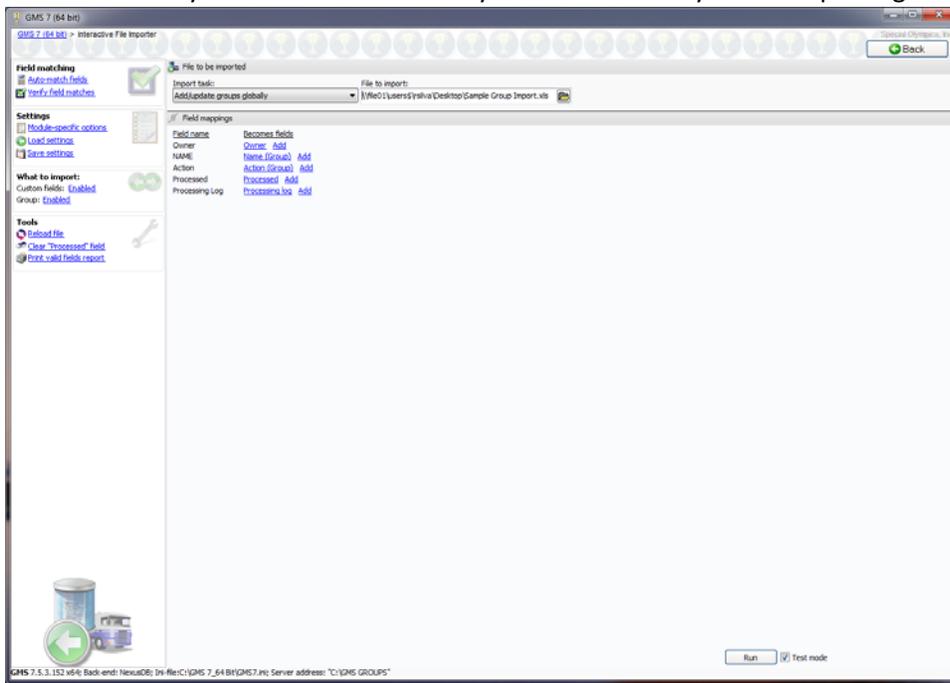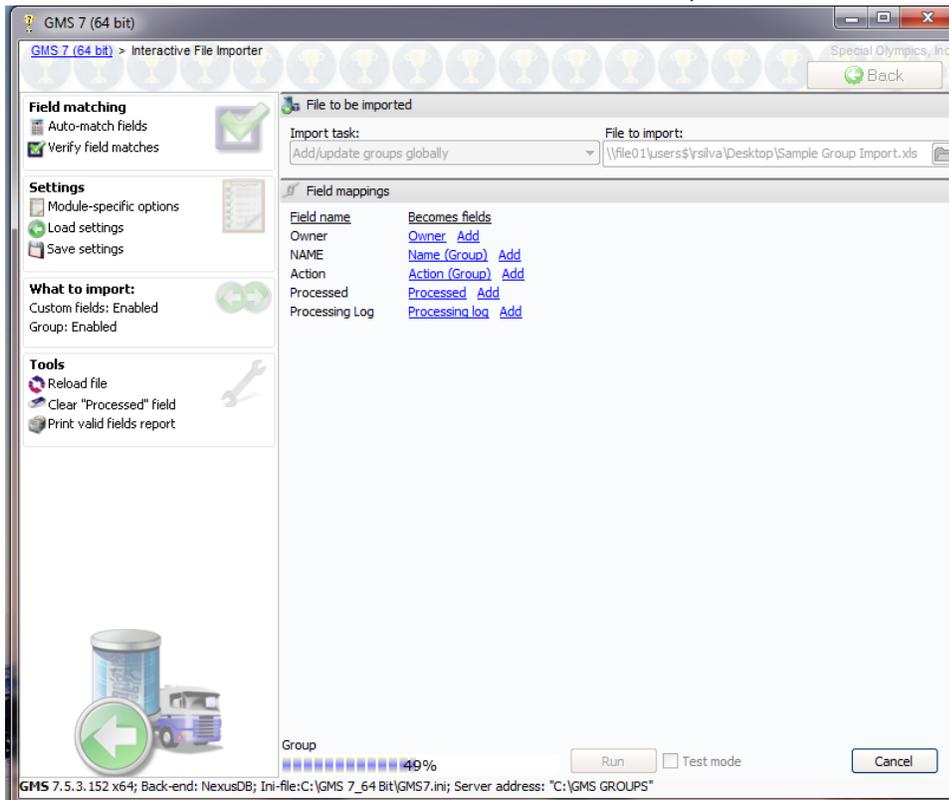

10. Even in test mode a reported is generated letting you know what the importer has done. Note in Test Mode, no changes to GMS are being made.

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.


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.


	Owner	NAME	Group Type	Action	Processed	Processing Log
1	Owner	NAME	Group Type	Action	Processed	Processing Log
2		Actonville Training Centre	Group	C	TRUE	Create/Group importer: Creating new group "Actonville Training Centre".Changing group type to "Group"
3		Albertina Sisulu Special School	Group	C	TRUE	Create/Group importer: Creating new group "Albertina Sisulu Special School".Changing group type to "Group"
4		Alexandra Hospital	Group	C	TRUE	Create/Group importer: Creating new group "Alexandra Hospital".Changing group type to "Group"
5		Alta Du Toit Aftercare	Group	C	TRUE	Create/Group importer: Creating new group "Alta Du Toit Aftercare".Changing group type to "Group"
6		Alta Du Toit School	Group	C	TRUE	Create/Group importer: Creating new group "Alta Du Toit School".Changing group type to "Group"
7		Anastacia Pre-School & Daycare	Group	C	TRUE	Create/Group importer: Creating new group "Anastacia Pre-School & Daycare".Changing group type to "Group"
8		Avuxakeni Hospital	Group	C	TRUE	Create/Group importer: Creating new group "Avuxakeni Hospital".Changing group type to "Group"
9		Bana Ba Thari Special School	Group	C	TRUE	Create/Group importer: Creating new group "Bana Ba Thari Special School".Changing group type to "Group"
10		Bangwanate Disabled Project	Group	C	TRUE	Create/Group importer: Creating new group "Bangwanate Disabled Project".Changing group type to "Group"
11		Beacon School	Group	C	TRUE	Create/Group importer: Creating new group "Beacon School".Changing group type to "Group"
12		Beacon School	Group	C		Error/Group importer: Cannot create new group "Beacon School" - one already exists with that name.
13		Bel Porto School	Group	C	TRUE	Create/Group importer: Creating new group "Bel Porto School".Changing group type to "Group"
14		Bele School	Group	C	TRUE	Create/Group importer: Creating new group "Bele School".Changing group type to "Group"
15		Benedict & Hope	Group	C	TRUE	Create/Group importer: Creating new group "Benedict & Hope".Changing group type to "Group"
16		Benedict & Hope Special School	Group	C	TRUE	Create/Group importer: Creating new group "Benedict & Hope Special School".Changing group type to "Group"
17		Bet El School	Group	C	TRUE	Create/Group importer: Creating new group "Bet El School".Changing group type to "Group"
18		Bet-El School	Group	C		Error/Group importer: Cannot create new group "Bet-El School" - one already exists with that name.
19		Bethesda Special School	Group	C	TRUE	Create/Group importer: Creating new group "Bethesda Special School".Changing group type to "Group"
20		Blouvlei School	Group	C	TRUE	Create/Group importer: Creating new group "Blouvlei School".Changing group type to "Group"

13. Now when you go back to Setup, and Groups you will see all of the Groups that you just imported.
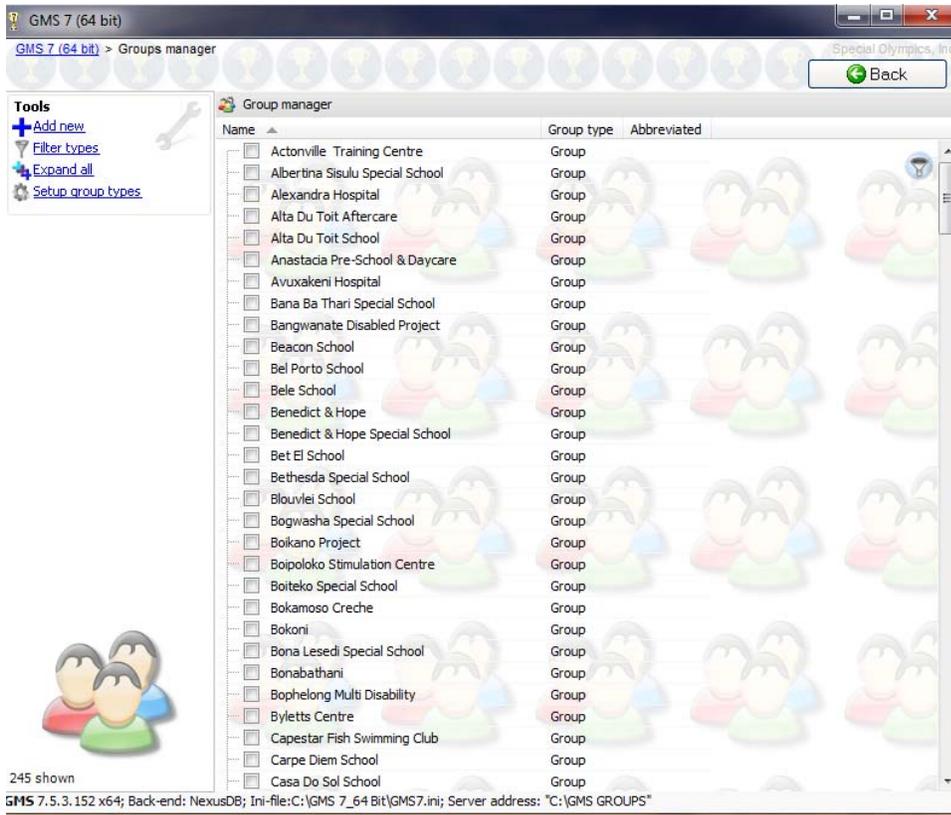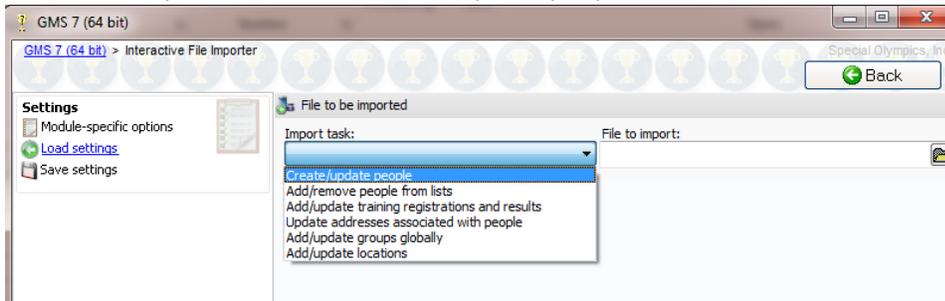
14. Now that you have your Groups (local Programs) in GMS you are ready to import People. It is recommended that the first few times you Import People, work with small files, maybe 100 People. Make sure your import file has these columns: Owner, Processed and Processing Log.
Click on User Tools, then Interactive File Importer.
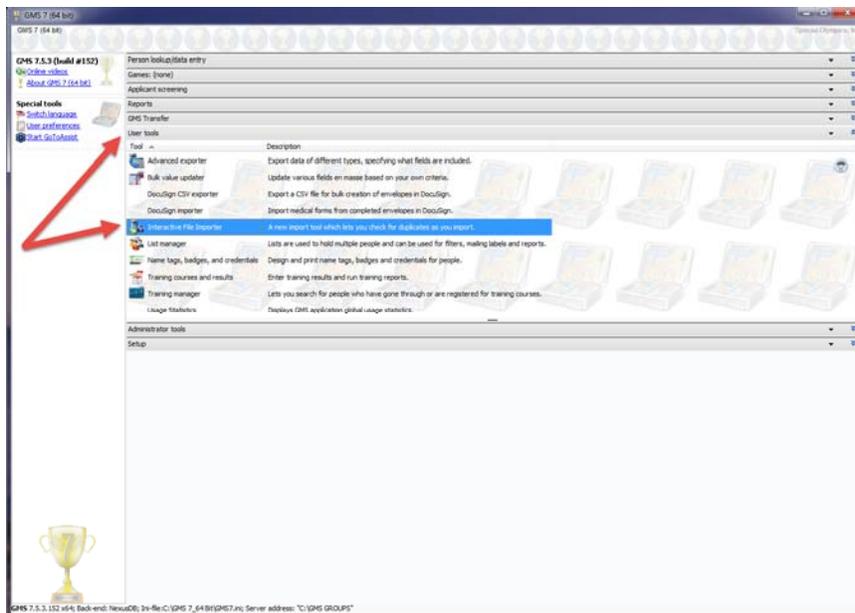
15. Under Import Task select "Create\update people

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).
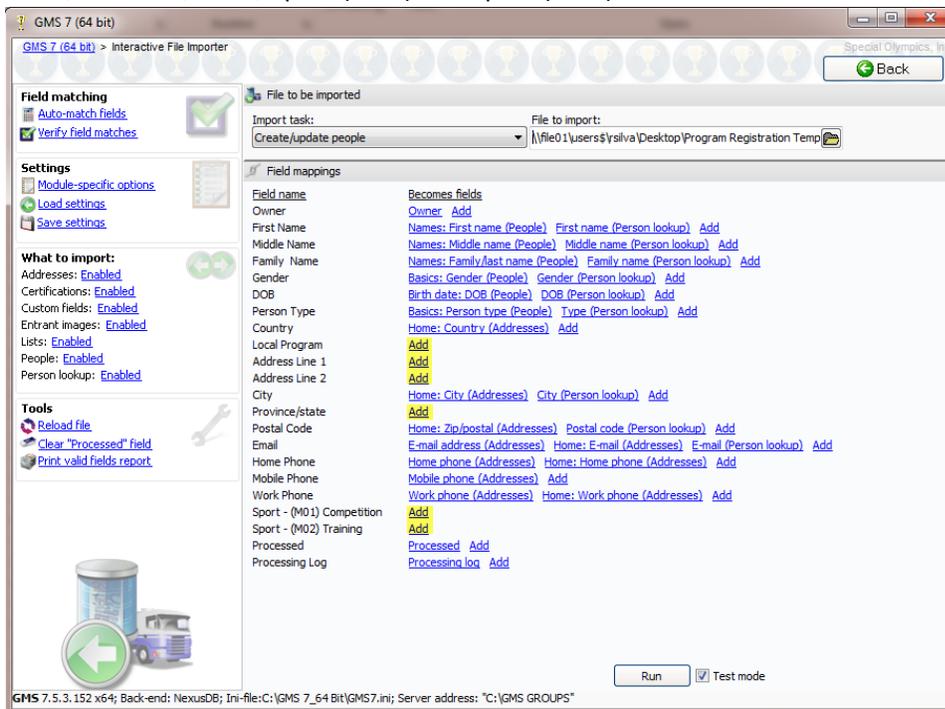

17. To map the fields you will need to understand the relationship. Example Local Program is the Group, which is related to People. Click on Add next to Local Program, since Local Program is the Group, and Groups are related to People, now click on people, then click on Group.
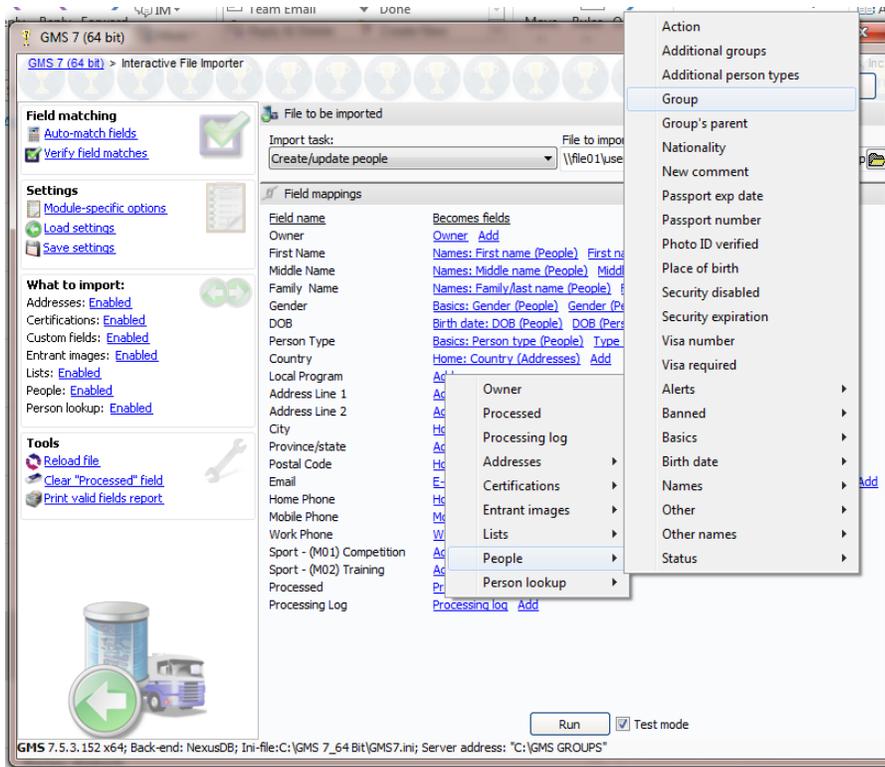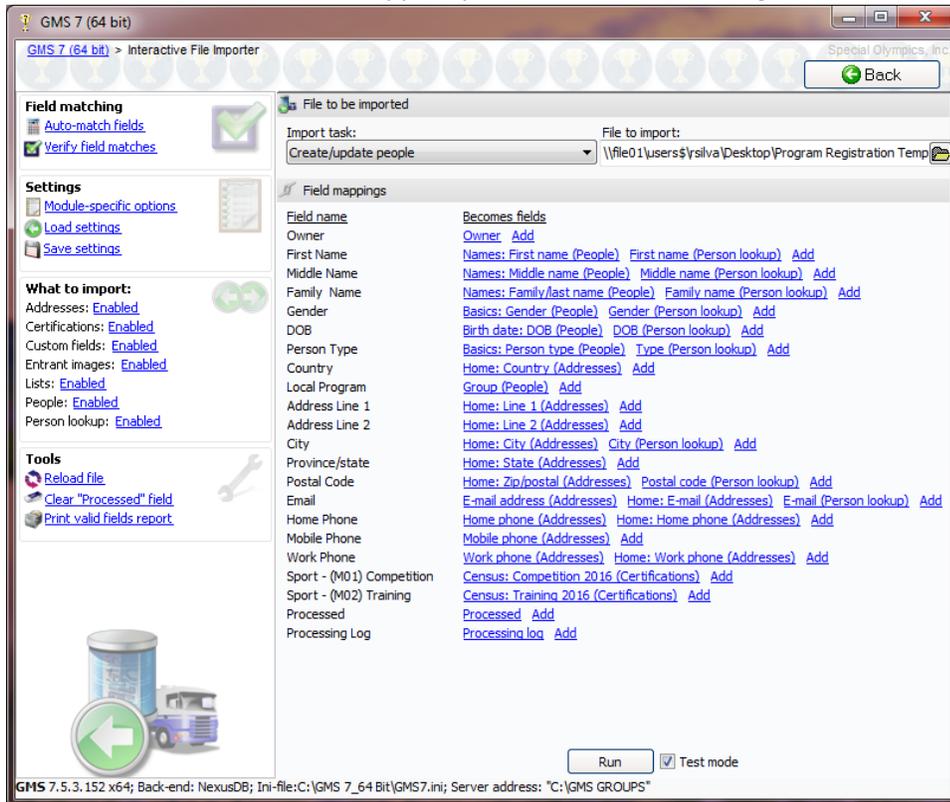
18. Repeat the process for all the Fields that have Add., this the example for Address Line One, select the address type and then Line 1.
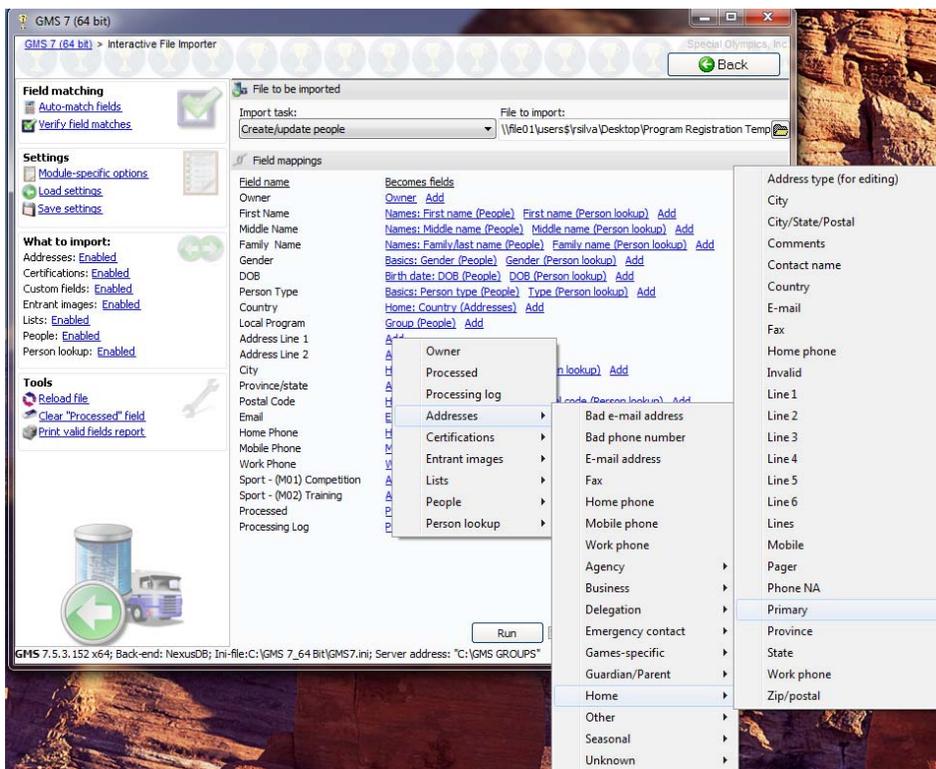
19. Once all of the fields are mapped, you should see something that looks like this

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 GMSHelp@specialolympics.org Please send the Spreadsheet you where importing, this will help us isolate the problem.