

Introduction

This section will cover creating and printing credentials. As of GMS 5.5, credentials can be printed globally or from within the context of a games.

Credentials can take many forms: wristbands, classic photo IDs, even mailing labels.

Printing credentials is a four step process:

1. Specify the criteria for selecting the people to be printed
2. Load/create/edit a template, which defines how the credential will work
3. Get and print the credentials
4. Mark the credentials as printed

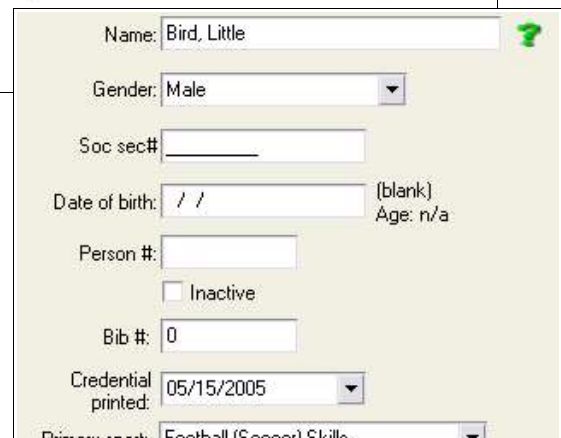
Tracking printed credentials

When selected by the user, GMS marks entrants whose credentials have already been printed to prevent accidentally printing the same entrant twice. Every time a credential is marked as printed for an entrant, a record of this appears on the person's "Credentials printed" tab.



Type name	Date Printed	Date Expired	Context	Cancelled
Donna's 5384	06/21/2005		2004 STATE FALL GAMES	No
Coach Credentials	06/21/2005		(global)	No

Illustration 1, Credential printed records



Name: Bird, Little

Gender: Male

Soc sec#: _____

Date of birth: / / (blank) Age: n/a

Person #: _____

Inactive

Bib #: 0

Credential printed: 05/15/2005

Print context: Football (Soccer) Skills

Illustration 2, Credential printed in this games

When printing within a games, GMS also sets the entrant's "Credential printed" field, which is specific to this games. Any date in here indicates that the credential was previously printed; you can clear or enter a date here manually if necessary.

Getting started

To print credentials for entrants in a specific games, open the credentials tool from within the games by clicking on "Reports" then on "Credentials". Go to "Step 1 – People to be printed: outside of a games".

For credentials based on certifications outside of a games, click on "Tools" then on "Credentials". Go to "Step 1 – People to be printed: within a games".

Step 1 – People to be printed: outside of a games

The screenshot shows a web interface with three main sections: 'Who to Include', 'Certification Criteria', and 'Options/Sorting'.

- Who to Include:** A dropdown menu for 'Types of people to include:' is set to '(all)'. There is a checked checkbox for 'All Delegations' and an unchecked checkbox for 'Only entrants with photos'.
- Certification Criteria:** A dropdown menu for 'Run credentials for what kind of certification:' is set to 'Coach Certification'. There is an unchecked checkbox for 'If entrant has more than one certification meeting these criteria, use only the latest one' and an unchecked checkbox for 'Include only records which meet certain criteria'.
- Options:** A checked checkbox for 'Use a custom sort' and an unchecked checkbox for 'Exclude people who have a previous credential'.
- Sorting:** Four dropdown menus for 'Sort 1' through 'Sort 4'. 'Sort 1' is set to 'person.permanentdelegation', 'Sort 2' is set to 'person.name', and 'Sort 3' and 'Sort 4' are set to '(none)'.

Illustration 3, Criteria outside of a games

Credentials outside of a games are printed for people who meet certain certification criteria, for example coaches with a current sport certification and no credential printed in the past two years.

Select the types of people to be included (or all), their permanent delegations (or all), and whether or not those entrants without attached photos can be included.

Choose the type of certification to be printed: in this case, “Coach Certification” is selected, and all people with these will be printed. In addition, if an entrant has three coach certifications, three credentials will be printed.

The example below will only print one credential no matter how many certifications the entrant has, and only certifications with an effective date between today and two years ago will be considered. To define your own criteria, see “Appendix A: Certification criteria”.

The screenshot shows the 'Certification Criteria' section with the following settings:

- 'Run credentials for what kind of certification:' dropdown set to 'Coach Certification'.
- Checked checkbox for 'If entrant has more than one certification meeting these criteria, use only the latest one'.
- Checked checkbox for 'Include only records which meet certain criteria'.
- Text below the checkbox: **Effective date** is between -730 and 0 days from today

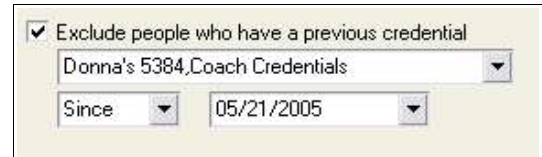
*Illustration 4, Custom selection criteria***Sorting**

To sort the records in a specific order, check the box “Use a custom sort” then specify the sort order you want. Leaving a sort criterion as “(none)” will accept GMS' default sort order.

Excluding entrants with previous credentials

You can exclude entrants based on their previously printed credentials of various types.

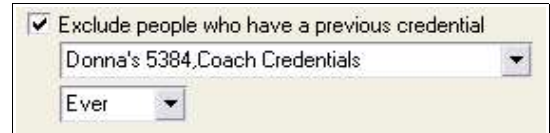
For example, these options will exclude any people who have a “Donna's 5384” or “Coach Credentials” credential printed since 5/21/2005.



Exclude people who have a previous credential
Donna's 5384, Coach Credentials
Since 05/21/2005

Illustration 5, Sample exclusion criteria

These will exclude entrants with the same credential types, regardless of when they were printed.



Exclude people who have a previous credential
Donna's 5384, Coach Credentials
Ever

Illustration 6, Sample exclusion criteria

Click on the [Next] button at the bottom of the screen to go to the templates page.

Step 1 – People to be printed: within a games

Who to Include	
Types of people to include:	
[all] ▼	
<input checked="" type="checkbox"/> All Delegations	
<input type="checkbox"/> All sports	
Football (Soccer) Skills, Football (Soccer) Team, Softball Skills, Softball Team ▼	
<input checked="" type="checkbox"/> Only entrants with photos	
Options	Sorting
<input checked="" type="checkbox"/> Use a custom sort	Sort 1: delegation.name ▼
<input checked="" type="checkbox"/> Include people even if their credential for this games has already been printed	Sort 2: person.name ▼
	Sort 3: [none] ▼
	Sort 4: [none] ▼

Illustration 7, Criteria within a games

Credentials within a games are printed for people who are registered (and not scratched) in the games who meet the basic criteria.

Select the types of people to be included (or all), their delegations (or all), and whether or not those entrants without attached photos can be included. If you don't check "All sports", select the sports that the entrants may be in. You may want to run different types of credentials for entrants in different sports. If "All sports" is not checked, entrants in no sports (for example, coaches not specifically assigned a sport) will not be printed.

Sorting

To sort the records in a specific order, check the box "Use a custom sort" then specify the sort order you want. Leaving a sort criterion as "(none)" will accept GMS' default sort order.

Excluding entrants with previous credentials

By default, GMS will not print anyone whose credential is marked as printed in this games (the date field on the person's page – GMS does not use the "Credentials printed" records here). If "Include people even if their credential..." is checked, GMS will include entrants regardless of whether or not their credential is marked as printed.

Click on the [Next] button at the bottom of the screen to go to the templates page.

Step 2 – Selecting the credential template

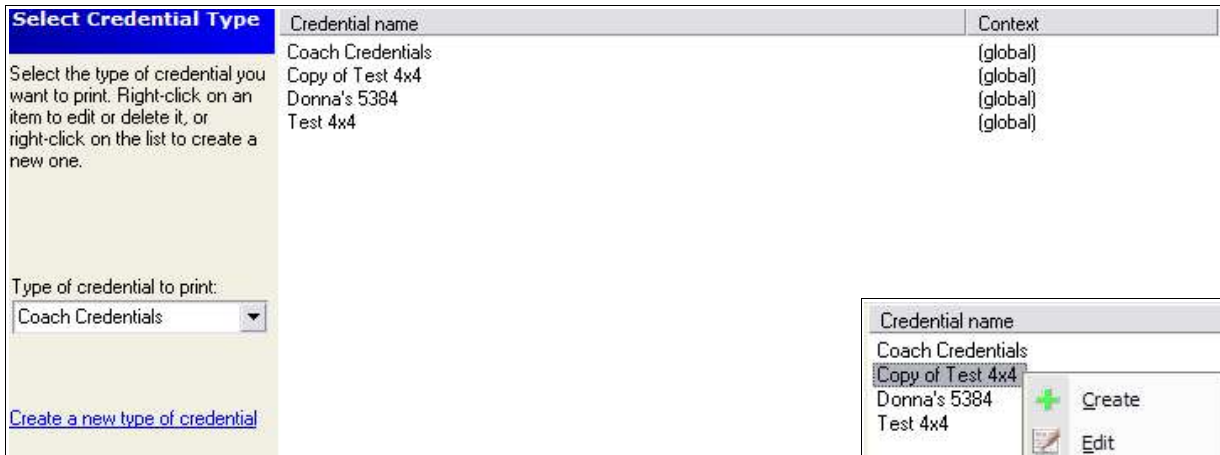


Illustration 8, Credential types

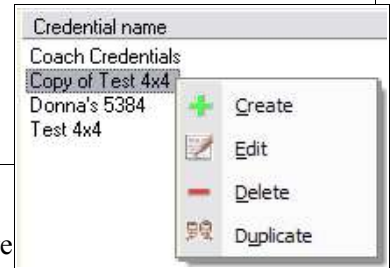


Illustration 9, Right-click on a credential type

GMS does not come with any built-in credential types here; the ones shown are examples of manually-created credentials. Click on “Create a new type of credential” to make a new one, on a single credential to use that type, or right-click on one for options on editing it.

(Note that deleting a credential type will cause GMS to remove all records of that credential type ever being printed.)

Seven basic credential templates are built in, and new ones can be designed. To use an existing one, click on “Use a pre-built template” and select an option from the list. You can then edit that credential's layout by clicking on “Design report”.

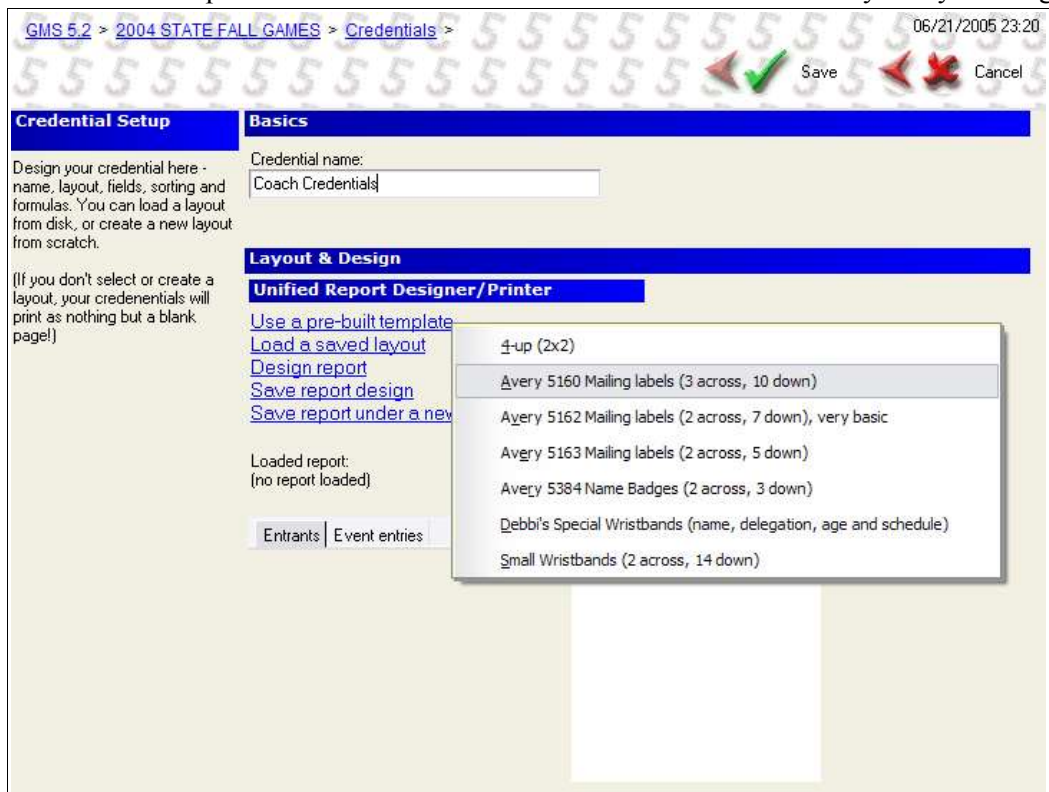


Illustration 10, Designing a new credential, or editing an existing one

Name the credential – at the top of the page; this example is called “Coach Credentials”. It can be renamed later, and its design can be modified later, without losing any previously printed records, although these records will take the new name assigned.

(Clicking on “Save report design” or “Save report under a new name” saves the design on disk as a file which can then be used on another computer; it does not save the credential layout or name in the database.)

For help in designing a report, see the document “Report Designer”. Bespoke's technical support will also usually be glad to help you in modifying an existing design, or give you copies of designs that we've come up with or that others have given us for distribution.

Click on the [Save] button at the top to return to the list of credential types, then select the type of credential to be printed.

Click the [Next] button at the bottom to go to the printing page.

Step 3 – Get and print credentials

When printing large numbers of credentials, credentials which include photos, or using card printers, you will generally not want to send hundreds or thousands of credentials to the printer at once. To limit the number printed at one time, check the “Batch mode” box and enter the number of entrants to be selected in each pass.

Click on [Get all records] or [Get next batch]. GMS will determine all of the eligible entrants and list them. By default, all records will be checked. You can un-check or check entrants as appropriate; only checked entrants will be printed or marked.

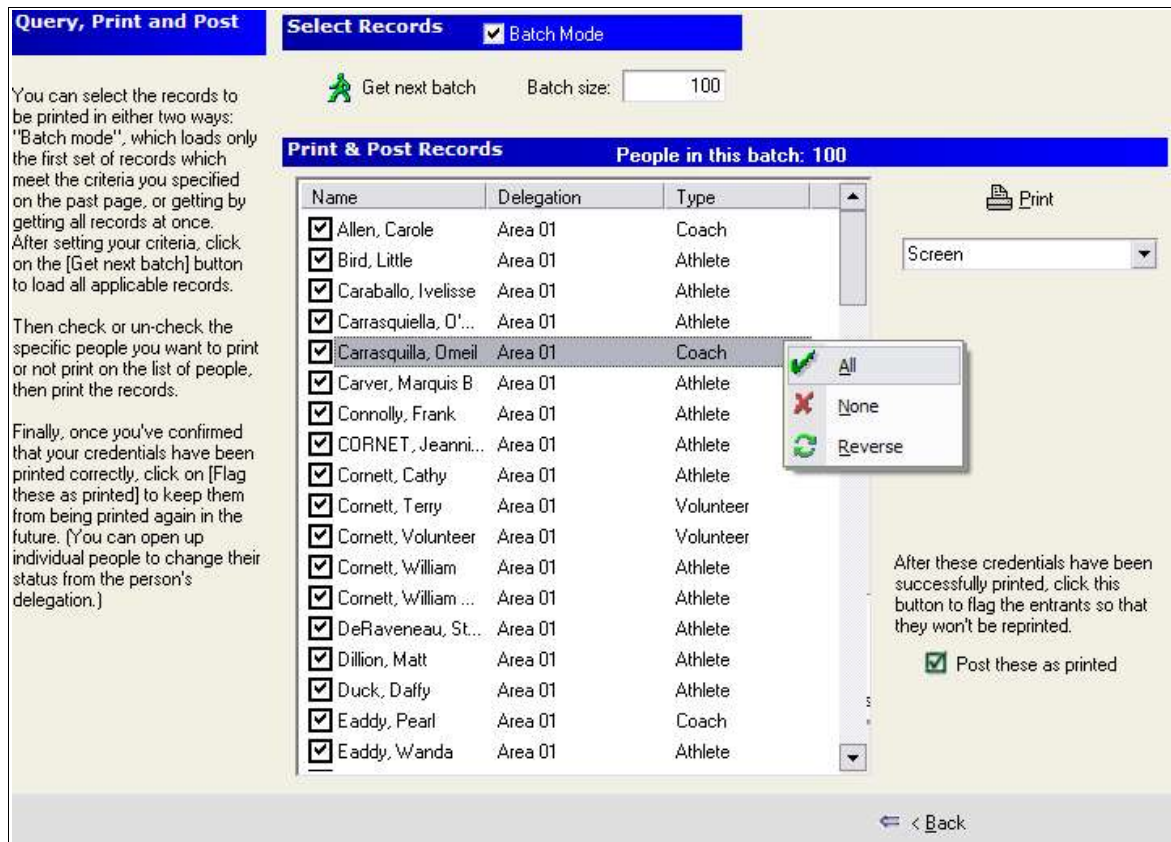


Illustration 11, Credentials ready to print

Select the printer to send the credentials to and click on [Print]. If any print incorrectly or need reprinting, un-check all of the entrants (right-click to get a tool for this) then check the ones to be reprinted and click on [Print] again.

Step 4- Mark the credentials as printed

To mark these entrants' credentials as printed, click on the [Post these as printed] button. This will only change the state of the entrants which are checked on the list to the left. Within a games, it marks the “Credential printed” field on the person's first page with today's date, and in all cases, it puts a record on the person's “Credentials” page.

If you're working in batch mode, click on [Get next batch] to get the next group of entrants to print.

Appendix A: Certification criteria

GMS lets you use complex criteria for the selection of certifications. Check the box “Include only entrants which meet certain criteria” and then click on the “No criteria...” label to provide the conditions under which a certification, and by extension its owner, will be included.

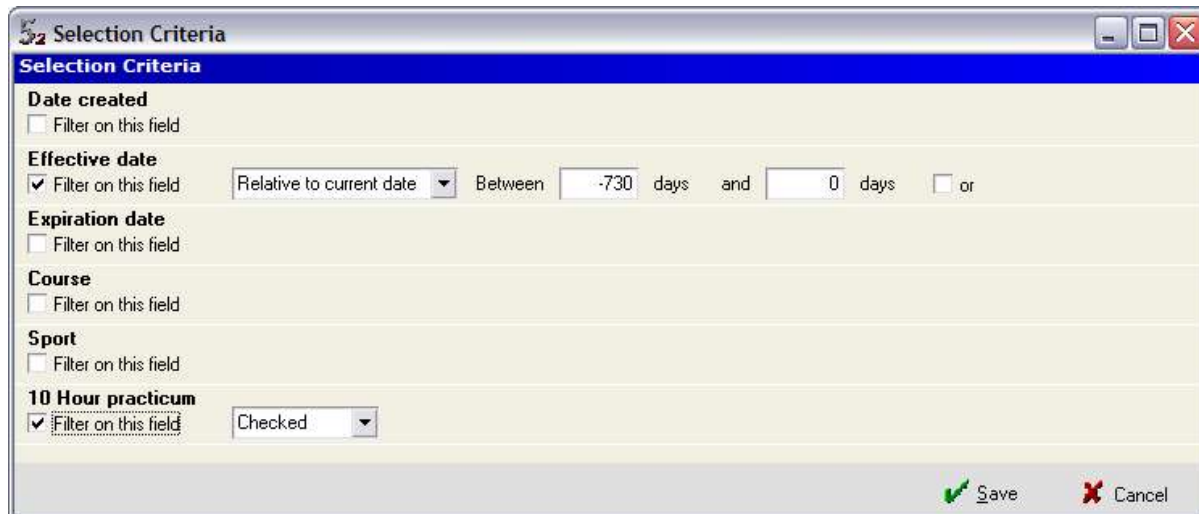


Illustration 12, Sample certification criteria

The different fields each have their own options, and different types of fields have different sets of options. For each field you can choose to filter on that field by checking “Filter on this field” or to ignore that field by not checking it.

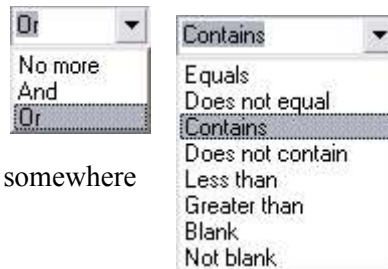
Checkbox fields

Only two options: “Checked” and “Not checked”. The field must match the value selected, or the certification will not be considered.

Memo and character fields



You can apply up to two values to each of these fields, each with its own match criterion. Two include two comparisons, change “No more” to either “And” or “Or”.

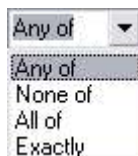


The example above will include this record only if the field “Send/receive log” contains the strings “sent” or “retrieved” somewhere within it.

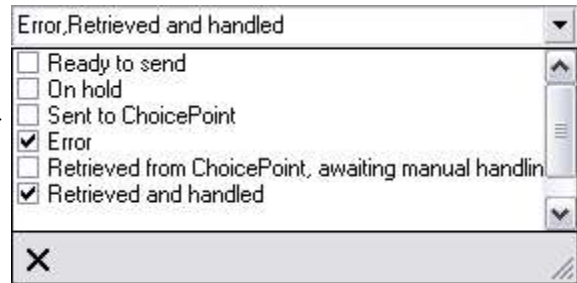
Checklist fields



These have four options: “Any of”, “None of”, “All of” and “Exactly”.



- Any of Matches if any of the fields checked on your list match fields checked in the certification.
- None of Matches only if none of the fields checked on your list are checked in the certification.
- All of Matches only if all of the fields checked on your list are checked in the certification; extra checked fields in the certification are not a problem.
- Exactly Matches only if the fields you checked exactly matches the list checked in the certification.



Date fields

Date retrieved
 Filter on this field Specific dates Between 06/01/2005 and 06/30/2005 or Between 04/01/2005 and 06/15/2005

Date created
 Filter on this field Relative to current date Between -365 days and 90 days or

Dates can be provided two ways: specific date ranges or relative to the current date. To specify a date before today, enter a negative number of days. The first example will include records retrieved between 6/1/2005 and 6/30/2005, or between 4/1/2005 and 6/15/2005 (the overlap between the two is harmless).

The second example here will include records created one year prior to today through ninety days into the future.