

SETTING UP YOUR OWN CATEGORIES

This brief introduction is designed to introduce you to GEM's 'Hierarchical Categories' and how you can setup your own to be used for many different purposes.

This is not intended to be a substitute for the User Manual, accessible through the Start Menu, or on-line help system that you can always get by pressing F1. The User Manual concentrates on the detail of how to use the system. These modules give more of an overview of what a feature is for and different ways of using it.

Business Categories

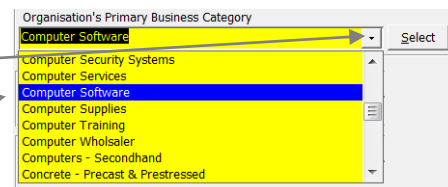
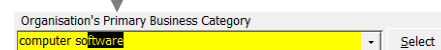
There are literally thousands of Business Categories in GEM – all the 'Business Classifications' in 'Yellow Pages', plus some - covering all sectors of the economy. Users can't make up their own Categories when adding a new business, because Users will then use different words to describe the same thing – making it almost impossible to find similar businesses.

Because GEM's Categories are organised in a hierarchical structure, exactly like Windows' Directories/Folders, it is possible to pick highly specific Business Categories or more general ones.

When you first create someone's record in GEM you can give them a **Primary Business Category**.

This can be done in a number of ways:

- If you know the Category's name, simply start entering it, and it will 'auto complete' for you.
- You can use the 'Pull-down Arrow' List at the end of the control to display them in alphabetic order. Simply scroll-down to find the one you want.



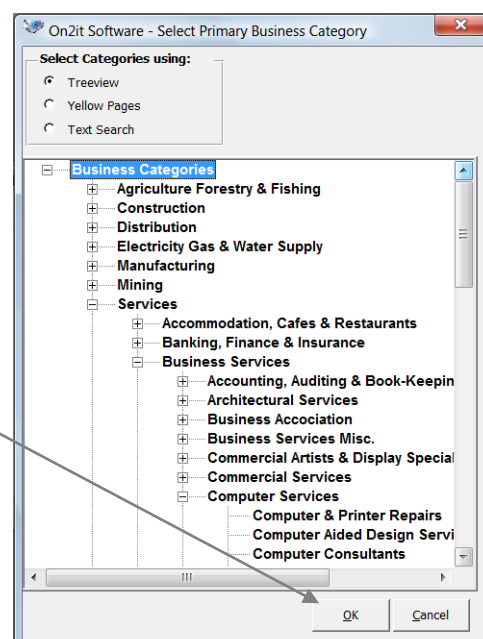
The problem is that since there are over 3,000 'Business Categories', it can be a long scroll. So it is probably easier to use the **Select** Button alongside the control. This will display the:

Select Primary Business Category Form

This gives you 3 different ways of selecting a 'Primary Business Category':

- **Treewiew** reveals the hierarchical nature of GEM's categories. Just expand the structure until you find the category you want, select it and click **OK**.

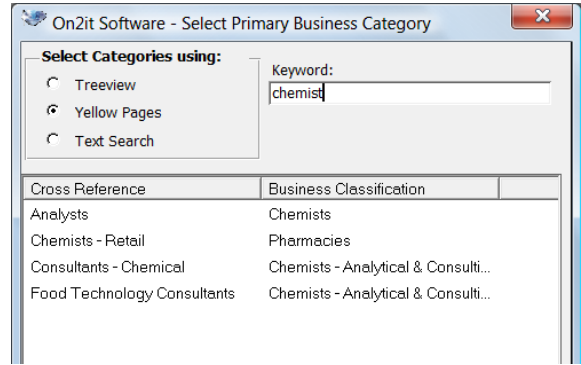
This is good if you are not sure what to call it, but you do know which part of the economy a business fits into. If you don't know where it fits, then searching in this way can take time as well. So one of the remaining ways might be better:



- **Yellow Pages** enables you to search both the ‘Cross References’ and ‘Business Classifications’ that you find in ‘Yellow Pages’ to find a particular Category.

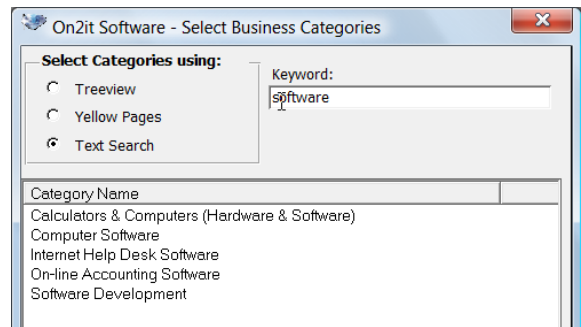
This means you might be able to find the Category you need even if you don’t use the right words.

The disadvantage of this approach is that not all business types advertise in ‘Yellow Pages’ – Farmers, for example. So you won’t find the Category you want using this approach.



- **Text Search** looks for the occurrence of any text string in ‘Business Categories’. So it searches all ‘Business Categories’ – even those NOT listed in ‘Yellow Pages’.

Again, just select the Category you want and click **OK**.



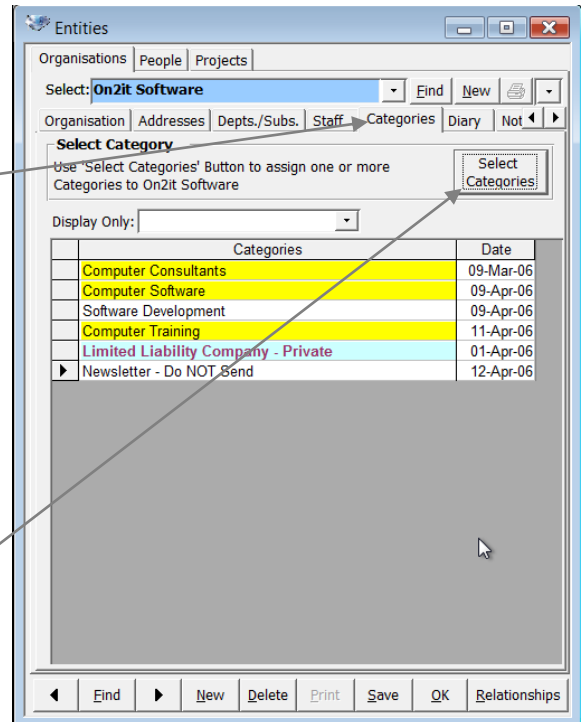
Selecting Multiple Categories

Of course many businesses operate in multiple Business Categories. It is also possible, as we shall see, to use ‘Hierarchical Categories’ for many different purposes as well.

To allocate more than a ‘Primary Business Category’ you need to use the **Categories** Tab on the ‘Entities’ Form.

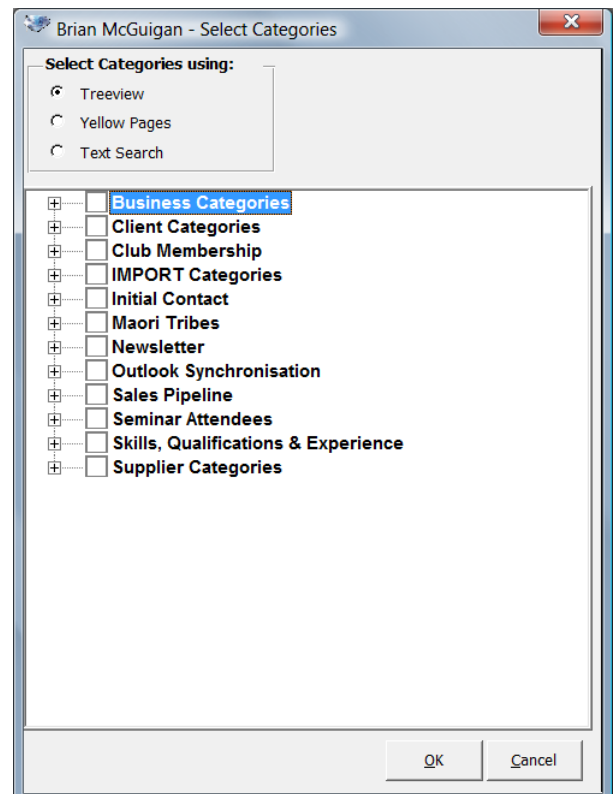
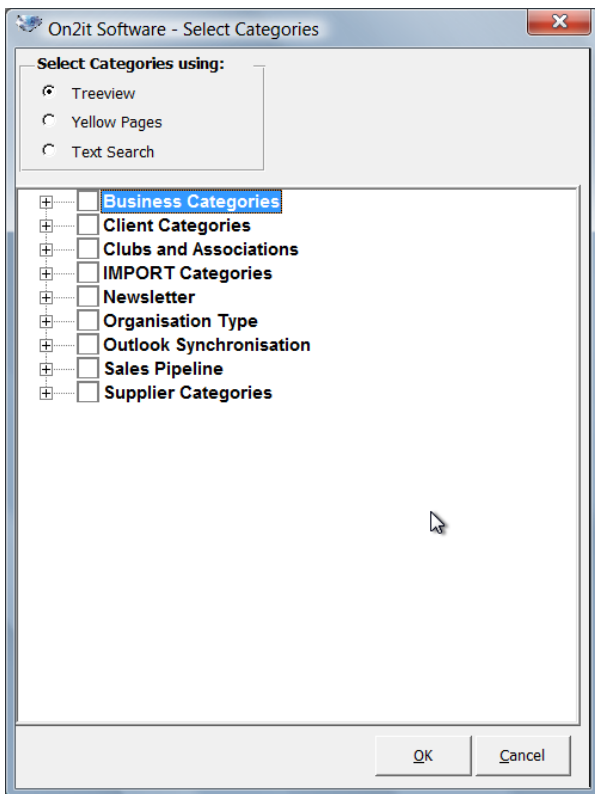
As you can see from this example ‘On2it Software’ has four ‘Business Categories’, three of which are ‘Yellow Pages Classifications’ and one which is NOT in Yellow Pages. Its ‘Organisation Type’ is a ‘Limited Liability Company – Private’. We have also given it a ‘Newsletter Category’ so we don’t send a copy of our own newsletters to the company itself.

To assign one or more Categories use the **Select Categories** Button. This will display the:



Select Categories Form

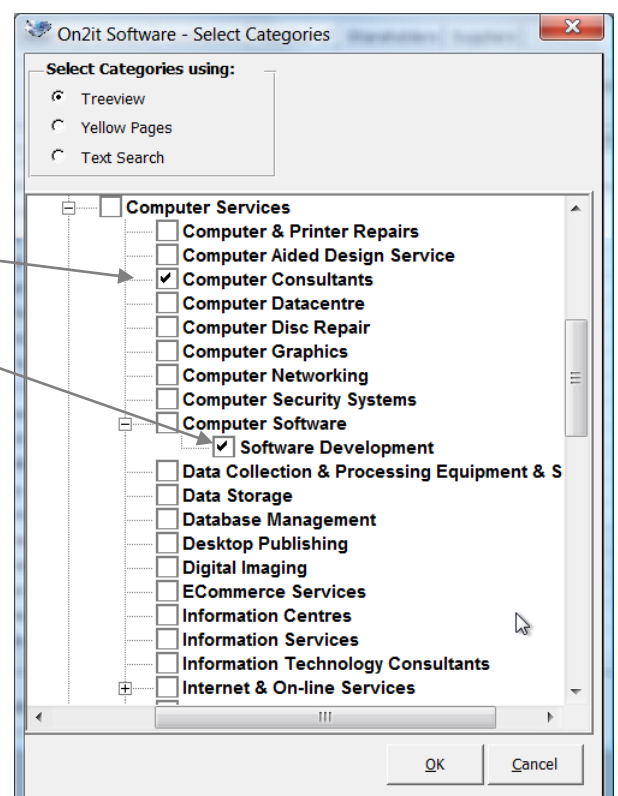
This shows you can create 'Category Types' for many different reasons apart from 'Business Categories'.



When you display the 'Select Categories' Form for People you will be given a different set of 'Category Types' to choose from compared to Organisations. This is because it would be confusing to ask what 'Organisation Type' a Person is, or the Qualifications and Experience an Organisation has. So when new 'Category Types' are setup in GEM, you can specify which 'Entity Types' they apply to.

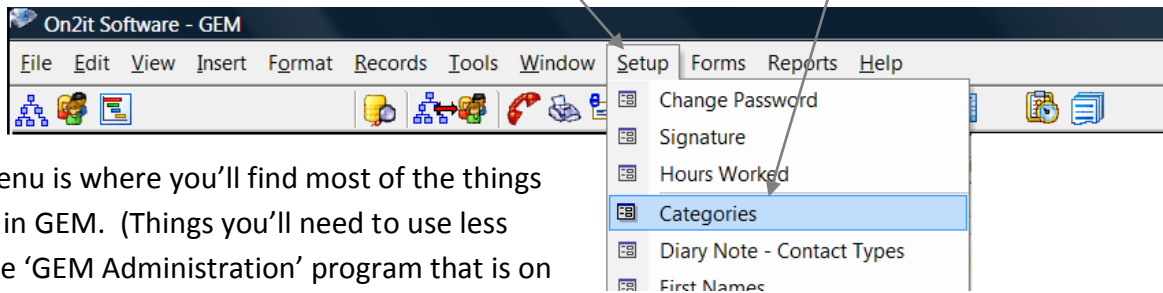
We recommend that you expand some of the 'Category Types' you see above and see how they are structured.

You can select multiple categories at the same time by checking as many boxes as you like before clicking **OK**.



How to Setup Categories

The 'Setup Categories' Form is accessible through the **Setup** Menu and the **Categories** Option.



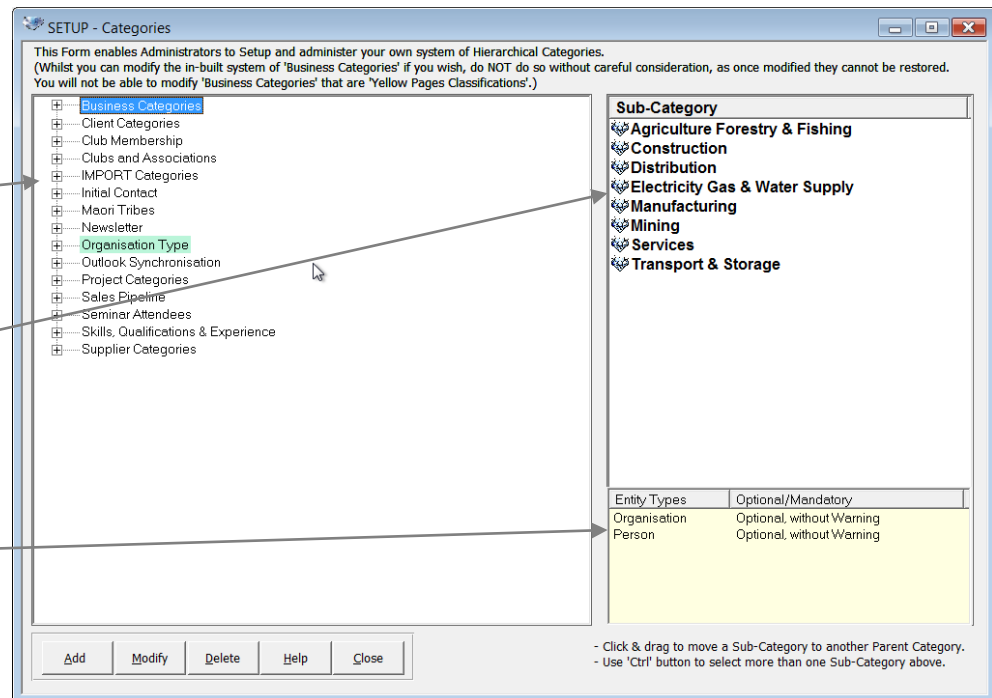
The 'Setup' Menu is where you'll find most of the things you can setup in GEM. (Things you'll need to use less often are in the 'GEM Administration' program that is on the Windows Start Menu.)

When the 'SETUP – Categories' Form first opens, it will display:

Category Types that can be used for different purposes,

Sub-Categories of the the currently selected Category Type,

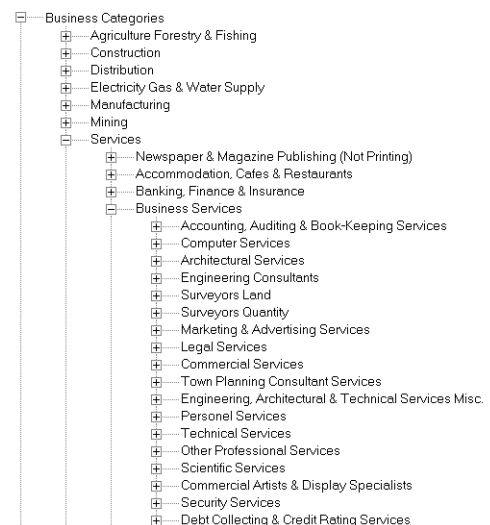
Entity Types that the selected Category Type applies to.



'Category Types' are simply top-level Categories that have no 'Parent Category' themselves. They can be broken down into as many Sub-Categories as you like – in exactly the same way as Directories/Folders in Windows.

Business Categories

If you use the small + and – signs to expand and collapse 'Business Categories' you will be able to see all the 3,000 odd pre-defined 'Yellow Pages' Business Classifications that the system comes with. These have been organised into a hierarchical structure that conforms to the 'Standard Industry Classification' or 'SIC Code' system that is used in both Australia and New Zealand. They have also been supplemented with Business Categories that do not appear in Yellow Pages because those Trades or Professions do not normally advertise.



Having Categories organised into a hierarchical structure makes it very easy to find everyone in 'Business Services', for example, as all you need to do is select 'Business Services' as automatically includes everyone in all of its sub-categories as well. But we'll see more of that later when we look at the FIND Form.

You can add to Business Categories for your own purposes, modify their names, drag-and-drop them into different places into the structure, but you will NOT be able to delete any Business Category that corresponds to, or contains a category that corresponds to, a 'Yellow Pages Business Classification'. This is to prevent anyone deleting 'Business Categories' by accident – thereby destroying the classification of every business in your system! You CAN delete any Business Category that you add yourself.

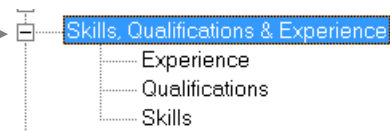
Add, Modify or Delete Categories

Apart from the restrictions on deleting 'Business Categories' that have corresponding 'Yellow Pages Business Classification' already noted, you can add, modify or delete categories at will, even 'Top-Level' Categories that you can use for any purpose you like.

To add, modify or delete a Category either use the Buttons along the bottom of the form, or select a category in the 'tree-view' of the Category Structure, then right-click it to display a 'short-cut' menu and select the option you want.

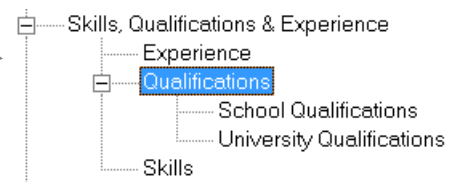
Exercise – Adding Categories

The trial data that comes with GEM includes a 'Category type' that looks like this:



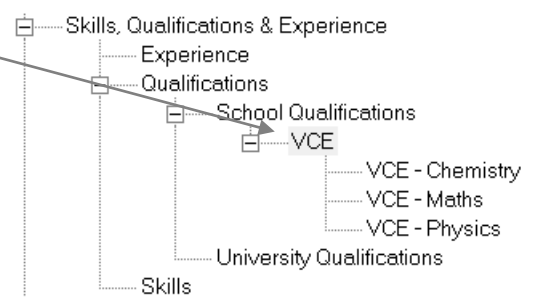
ADD some categories until it looks like this:

Hint: Select 'Qualifications' BEFORE choosing ADD.

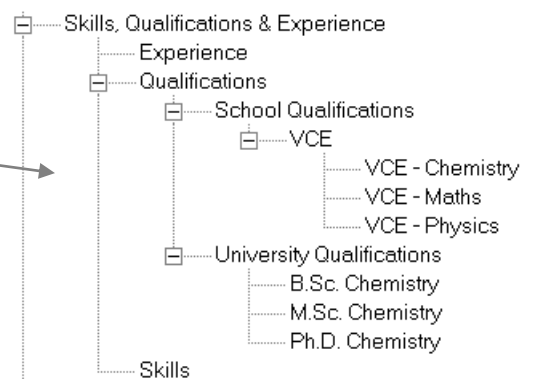


Now add a 'School Qualification' – 'VCE' or 'Victoria Certification of Education' with the Subjects shown.

Note the use of 'VCE' as a prefix for all the VCE Subjects. This is so when the name appears on the 'Categories' Tab of the 'Entities' Form you will know exactly which qualification you are talking about.

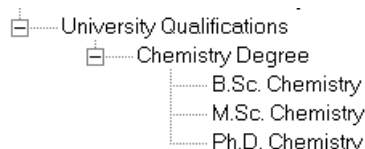


Now add some University Qualifications until it looks like this:



Exercise – Moving Categories

But if we wanted to be able to find anyone with any sort of chemistry degree, we would need to add an another 'University Qualification' called 'Chemistry Degree' and then drag-and-drop the existing Chemistry Degrees into it until it looks like this:



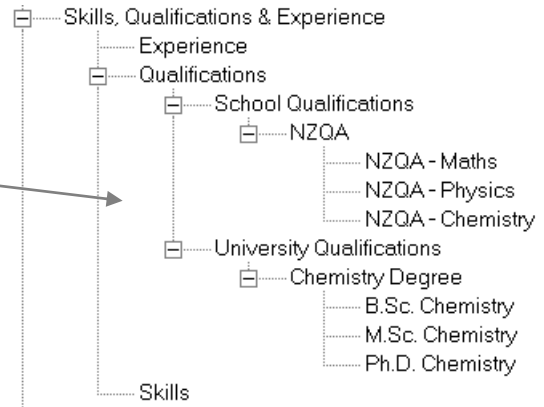
Don't forget to select each Degree before you drag-and-drop it.

Exercise – Modify Categories

If you were in NZ, you would probably be more interested in NZQA qualifications instead of VCEs. So modify your Qualifications to look like this:

Again don't forget to Select before you choose Modify.

When you modify a Category Name like this it modifies the name of the Category throughout the system – even ones that have already been allocated.

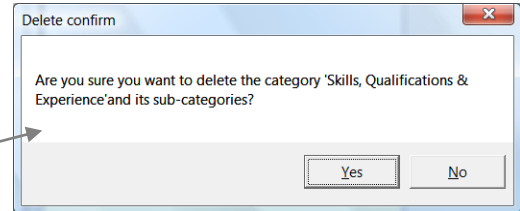


Exercise – Delete Categories

We'll now return Categories to the state we found it when we started. We are going to do this by deleting the whole of the 'Category Type' because we also want to show you how to create a new 'Top Level' Category or 'Category Type'.

So select 'Skill, Qualifications & Experience' as shown and use the delete button on the bottom of the form, or right-click it and choose 'Delete Category'.

This will display the 'Delete Confirm' Dialog Box.



You should always be careful when deleting Categories, as it will delete them throughout the system – even for ones that have already been allocated. This is an action that cannot be un-done. Re-adding the same Category will not solve your problem, as all prior allocations will also have been deleted.

Adding a Top-Level Category or 'Category Type'

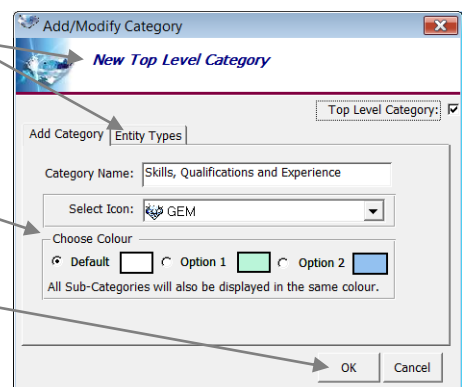
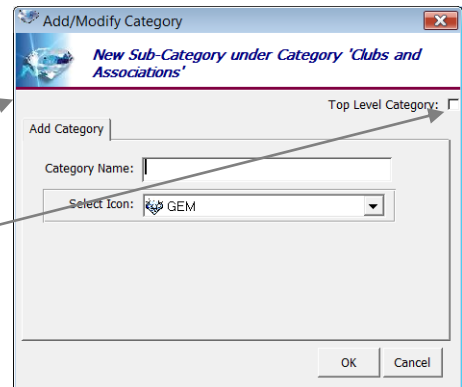
Top-Level Categories or 'Category Types' are simply Categories that are not part of a 'Parent' Category.

When adding a 'Top-Level' Category, it does not matter which existing Category is already selected, just click ADD Category as normal. This will display the **Add/Modify Category** Dialog Box.

To add a 'Top-Level' Category check **Top Level Category**.

This will change the **Title** on the form, add an **Entity Types** Tab and add **Choose Colour** controls, as shown.

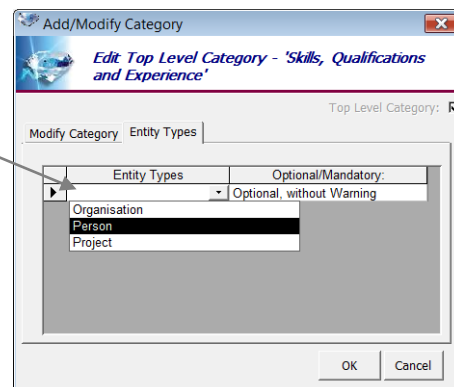
DO NOT use the 'Entity Types' Tab at this point. There is a Bug in the program, which will cause problems if you do. There is a simple work-around however. Just enter the new Category name, save the Category by clicking **OK**. Then re-open the Dialog Box before using the 'Entity Types' Tab.



Defining 'Entity Types' for a Top-Level Category

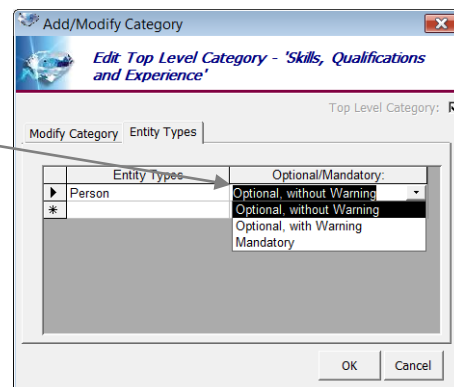
The 'Entity Types' Tab enables you to define the **Entity Types** to which a Top-Level Category applies. For example 'Skills, Qualifications and Experience' obviously applies to a Person.

However if you are running a Personnel Agency and want to match jobs to candidates, then you might want to have them apply to Projects as well. This is because you can rename 'Projects' to 'Jobs' and then use the same set of Categories to FIND Jobs for Candidates, or Candidates for Jobs.



Optional/Mandatory enables you to define how you want the system to behave when adding someone new:

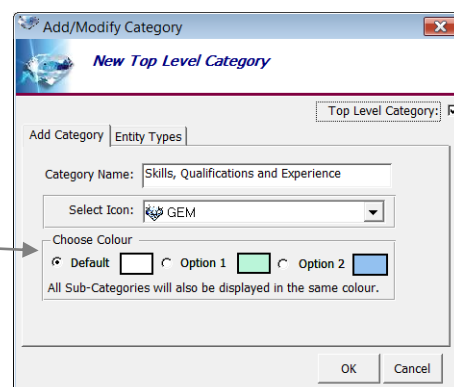
- **Optional, without Warning** means you can add someone new without adding a Category from this 'Category Type' as the system won't care.
- **Optional, with Warning** means that if you add someone new and fail to add a Category of this 'Category Type' you will be given a warning.
- **Mandatory** means that you will be unable to add someone new without adding a Category of this 'Category Type'.



'Choose Colour' for a Top-Level Category

This enables you choose the colour you want to display all Categories of this 'Type' in.

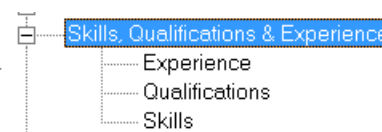
There are only three choices – the default, plus a couple of colours.



Exercise – Adding a NEW 'Top-Level' Category

Re ADD the 'Top-Level' Category 'Skills, Qualifications & Experience' – complete with sub-Categories, as shown.

Hint – see above.



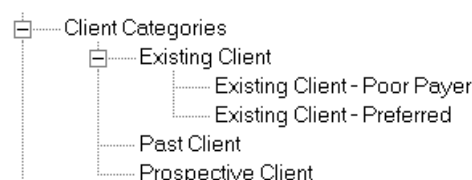
Using 'Category Types'

You can use 'Category Types' for many, many purposes. Several of these are illustrated in the trial data that comes with GEM. We suggest that you expand them and have a look for yourself. Hopefully these examples and the brief notes below may well give you some ideas on how you can use 'Hierarchical Categories' in your own business.

Client Categories

Since you can give someone the Category 'Existing Client', even though it has sub-categories, you can use this structure to find:

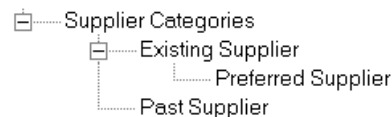
- Existing Clients,
- Past Clients,



- Potential Clients,
- Existing Clients who are not poor payers,
- Poor Payers only,
- Preferred Clients only.

Supplier Categories

These are similar to ‘Client Categories’.



IMPORT Categories

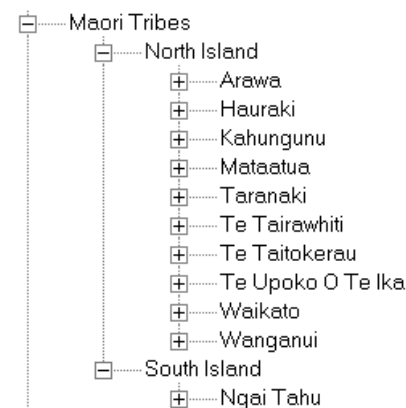
A set of Categories like this enables you to keep track of where your imported data originally came from.

Initial Contact

Enables you to keep track of where you originally met people.

Maori Tribes

Categories like this, or ‘Ethnicity’, ‘Nationality’ etc., enable you to track where people came from – if that’s important to you.



Newsletter

These categories enable you to keep control of any Newsletters you produce on either an opt-in or opt-out basis.

If you sent newsletters to everyone apart for those with a category of ‘Newsletter – Do NOT Send’, they would go out to everyone apart from people whose emails you know are invalid, your competitors, people who can only accept Text E-mails, and those that have unsubscribed.



Alternatively you can send it only to people who have requested it. The choice is yours.

Organisation Types

These Categories enable you to track what types of Organisation you are dealing with.

They are a different colour because they were setup to display in the colour shown.

Project Categories

Categories like these enable you to categorise your Projects in whatever way you like.

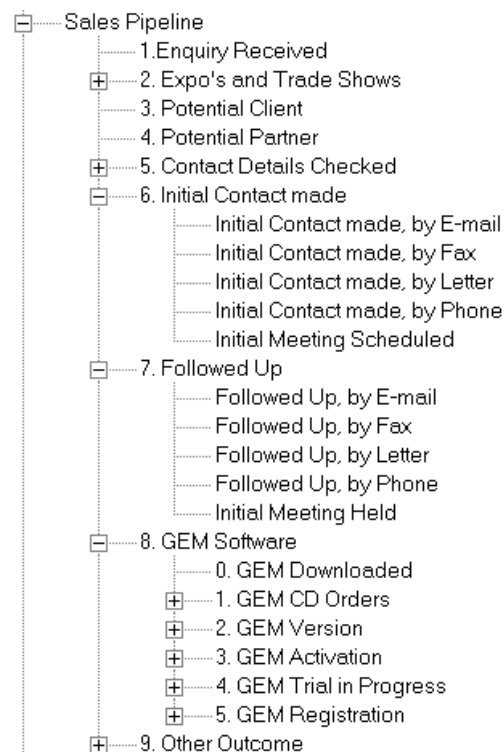


Sales Pipeline

If you want to create a Sales Pipeline, like the one shown here, it is necessary to number the steps in chronological order as shown.

The pipeline shown enables us to:

- Track Enquiries Received, and
- People we've met at various trade shows.
- Import data from multiple data sources and rate everyone according to their Business Categories as potential Clients or Partners.
- Contact them to ensure we have their details correct, and get permission to send details by E-mail.
- Make initial contact by various methods and follow up as often as required.
- Record Software downloaded from our website.
- Track CD Orders.
- Keep track of which version of software everyone has.
- Track software activations, subsequent trials and system registrations.

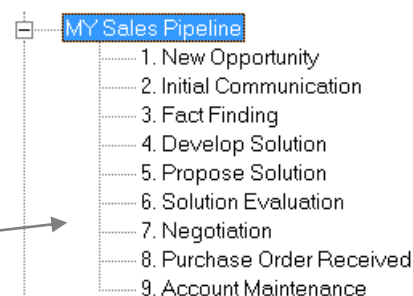


Seminar Attendees

Enables you to track who attended any Seminars you may have held.

Exercise – Creating a Sales Pipeline

Create a Sales Pipeline that looks like this:



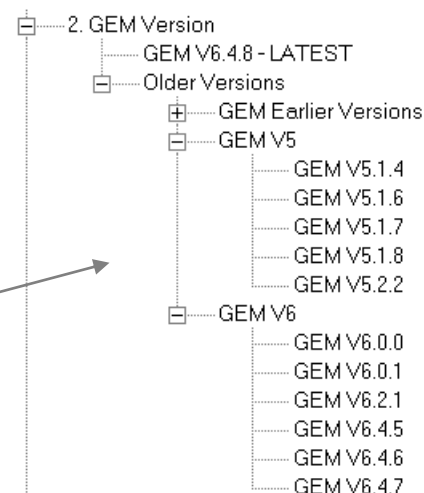
Don't forget to allow either both Organisations and People into the pipeline.

Evolve your Categories Dynamically

Don't worry if you don't get things right first time. Because you can add new categories at any stage, change the names of existing ones and drag-and-drop them into new locations in the hierarchical structure, you have total flexibility to change the way you do things at any time.

In the above Sales Pipeline we originally had no provision for 'Expo's and Trade Shows'. When we started going to trade shows we initially created a completely separate set of categories to track visitors to our stands. Then we realised that meeting people at trade shows, was just another way of making contact. So we merged that activity into the main 'Sales Pipeline'.

As an example of how you can deliberately setup your Categories to change them dynamically let's look at how we track the Version of GEM everyone has. If we expand '2. GEM Version' in our 'Sales Pipeline', we will see:

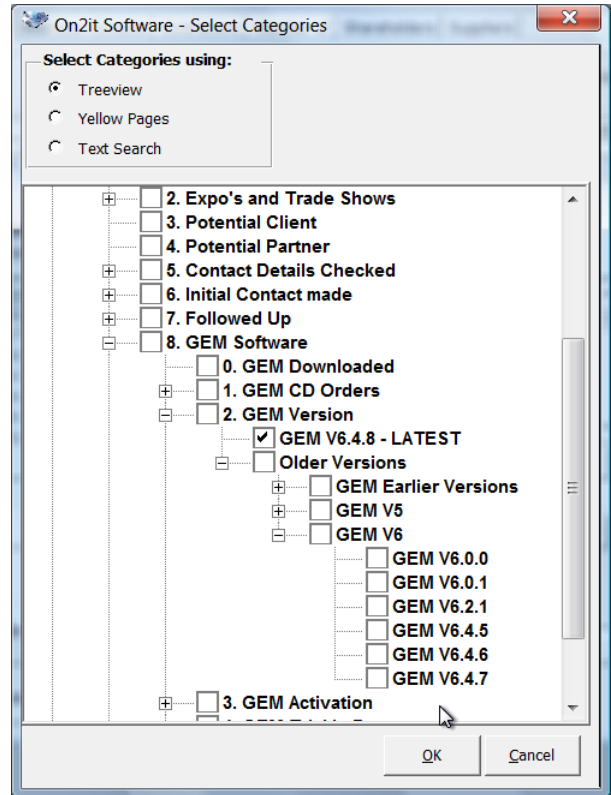


At the time of writing V6.4.8 is the latest available so this is at the top of the structure. This means we don't have to 'drill down' to far in the 'Select Categories' Form.

This structure enables us to easily find everyone who has:

- The LATEST version,
- Older Versions, or just:
 - V6
 - V5
 - or even 'Earlier Versions'

When V6.4.8 is no longer the latest, all we need to do in the 'SETUP – Categories' Form, is drag-and-drop it under 'GEM V6' and delete ' – LATEST' off the end. We'll then create a new Category called 'GEM V7.0.0 - LATEST' under 'GEM Version' and the jobs done. Because the renaming spreads throughout the system, we know that people who have V6.4.8, no longer have the latest.



If, in future, we need answer to answer different questions on a regular basis, we can always restructure our Categories when needed.

As another example of how you can structure categories to answer different questions more readily, expand 'GEM Earlier Versions'. This shows that we used make each earlier version a sub-category of the more recent version. This meant that if we wanted to find everyone who had 'GEM V12.16.0' or earlier all we needed to do was tick 'GEM V12.16.0' as shown.

If you applied this principle to qualifications, finding someone with a Bachelors degree would automatically find anyone with a Masters or Doctorate. Similarly if you applied it to experience Categories, finding someone with, say 5 years experience, would automatically include anyone who had more experience as well.

So when structuring Categories it pays to think through the questions you need to ask regularly and structure them to make things as easy as possible. However you also have the flexibility to change your mind as changing needs dictate.

