

Resources

Resources Overview

The Resources function provides features for entering items that will appear in drop-down lists for fields. Each site can enter items that appear for selection in categories: relationships, most frequently used city, state, and zip codes. For example, the Participant General form allows you to select category codes that you have set up in Resources/Categories. In your center, you might want to have category codes for Staff, Students, Community, etc. Within those categories, you might want to further describe the participant. For example, you might want to have additional category codes that describe the type of community participant – senior citizen, special Ed program, associations, etc. Using Resources, you can set up codes that are meaningful for your site.

If you want to be able to reduce your data entry tasks and do more concise reporting, use the Resources function to preset items that can be selected for fields.

In this chapter, you will learn how to:

- Enter Category Codes
- Enter Membership Codes
- Enter Zip Codes
- Enter Relationships

Category Codes

Category codes allow you to search and report on participants based on groups to which they belong. A category describes a participant. For example, category could be student, employee, corporate member, community member, etc.

Groups can also be further defined by additional categories. For example, companies for corporate participants, full-time or part-time for students, administrative for employees, etc.

Red Canyon Systems provides four levels of categories that can be entered on the Resources/Categories form and selected in drop-down lists on the Participant/General form. These categories also help you filter out participant groups for reports. An example of using four levels of category codes follows:

Category 1: Student Category 2: Full-time Category 3: Honors program Category 4: Tutor	Category 1: Corporate Category 2: IBM Category 3: Corporate Challenge Category 4:	Category 1: Community Category 2: Firefighter Category 3: Physical Therapy Category 4:
Category 1: Student Category 2: Full-time Category 3: Sports program Category 4: Baseball	Category 1: Corporate Category 2: Motorola Category 3: Daily workout Category 4:	Category 1: Community Category 2: Senior Category 3: Daily workout Category 4:
Category 1: Student Category 2: Full-time Category 3: Sports program Category 4: Baseball	Category 1: Corporate Category 2: Red Canyon Systems Category 3: Corporate Challenge Category 4:	Category 1: Community Category 2: Adult Category 3: Personal training Category 4:

Important Notes

- Category items must be exclusive in each level – do not use the same category in another level.
- Before you enter categories, it is a good idea to plan out your categories and levels to avoid overlapping descriptions.
- Be cautious when using categories to describe grade levels and other types of information that change frequently. If you entered category codes for grade levels (sixth grade, seventh grade, freshman, etc.), you would need to go to each individual record and change the category code each time the participant changed grade levels.
- You might want to identify sports with category codes. It would be useful to be able to select participants from a specific sport on which you could run reports.

Instructions for Entering Categories

1. On the **Resources** menu, select **Categories**.
The **Categories** form appears with the list of previously entered categories.

Code	Level	Description
Adm	2	Administrator
Ath	2	Athletes
Bsk	3	Basketball
Com	1	Community Member
Crp	1	Corporate
Emp	1	Employee
Fac	2	Faculty
Frn	2	Firemen
MsE	2	Mesa City Employees
Plc	2	Policemen
Stf	2	Staff
Stu	1	Student
Vlb	3	Volleyball

2. Click **Add** to start a new category record.
If you make a mistake while entering a record, before you click **Save**, click **Cancel**. A cancel message will be displayed for your confirmation.
Delete a record by clicking on the record and clicking **Delete**.
3. Click in the **Code** field. Type a code (up to 4 characters) that is an abbreviation for the category. Press Tab.
4. **Level**: select a level 1, 2, 3, or 4 to place the category. Press Tab.
5. **Description**: Type a phrase to describe the category.
6. Click **Save** to save the category record.

Membership Codes

Membership codes set up on the Resources/Membership Codes form will be displayed when you are entering participant information on the **Misc** form. These codes help identify the memberships you offer at a fitness center. Generally, a membership code is time-oriented (monthly, quarterly, annual). When you define the value of the time period (year, months, days), it will be used in the Participant Membership fields to calculate an automatic expiration date based on the enrollment date.

Follow these steps to enter membership codes:

1. On the **Resources** menu, select **Memberships**.
The **Memberships** form appears with the list of previously entered membership codes.

Code	Description	Years	Months	Days
Ann	Annual	1		
Mnt	Monthly		1	
Sem	Semi-Annual		6	

2. Click **Add** to start a new membership record. If you make a mistake while entering a record, before you click **Save**, click **Cancel**.
Delete a record by clicking on the record and clicking **Delete**.
3. Click in the **Code** field. Type a code (up to 4 characters) that is an abbreviation for the membership.
4. **Description:** Type a descriptive phrase to describe the membership code.
5. **Enter a value for one time period.**
Year: if the code describes one or more years of membership, enter the number of years. This field does not apply to membership codes that are less than a year. Press Tab.
Months: if the code describes one or more months of membership, enter the number of months. Press Tab.
Days: enter the total number of days that the code describes (31 for a month, 90 for a quarter).
6. Click **Save** to save the membership record.

Zip Codes

Zip codes set up on the Resources/Zip Codes form will be displayed when you are entering participant information on the **Participant General** form in the Zip Code field. By selecting a zip code that appears in the drop-down list, the city and state fields are filled in automatically for the participant. We recommend that you enter the zip code, city, and state information that is most-frequently used in your area.

Follow these steps to enter zip codes:

7. On the **Resources** menu, select **Zip Codes**.

The **Zip Codes** form appears with the list of previously entered zip codes.

ZipCode	City	State	Status
85289	Mesa	AZ	O
87877	Mesa	AZ	O
87181	Apache Junction	AZ	O
86727	Chandler	AZ	O
89898	Globe	AZ	O

8. Click **Add** to start a new zip code record.
If you make a mistake while entering a record, before you click **Save**, click **Cancel**. A cancel message will be displayed for your confirmation.
Delete a record by clicking on the record and clicking **Delete**.
9. Click in the **Zip Code** field.
Type the zip code. Press Tab.
10. **City:** Type the name of the city. Press Tab.
State: Type the two-character state code. Press Tab.
Status The default status is **O** (open). If you do not want the zip code to appear but you want to keep it for later use, enter **C** (closed).
11. Click **Save** to save the zip code record.

Relationships

Relationships that you set up on the **Resources/Relationships** form will be displayed when you are entering participant information on the **Misc** form in the Emergency Contacts relationship fields. Most-frequently used relationships have been entered for you upon installation.

Follow these steps to enter new relationship records:

12. On the **Resources** menu, select **Relationships**.

The **Relationships** form appears with the list of previously entered relationships.

Code	Description
Aun	Aunt
Bro	Brother
Bil	Brother-in-Law
Cch	Coach
Dau	Daughter
Ftr	Father
Fil	Father-in-Law
Fm	Friend
Gda	Granddaughter
Grf	Grandfather
Grm	Grandmother
Gso	Grandson
Mng	Manager
Min	Minister
Mtr	Mother
Mil	Mother-in-Law
Nei	Neighbor
Nph	Nephew
Nce	Niece

13. Click **Add** to start a new relationship record.

If you make a mistake while entering a record, before you click **Save**, click **Cancel**. A cancel message will be displayed for your confirmation.

Delete a record by clicking on the record and clicking **Delete**.

14. Click in the **Description** field.

Type a phrase that describes a participant's relationship to another person. Press Tab.

15. **Code**: Type the 1-3 character code.

Click **Save** to save the relationship record.