

RecDesk Director

User guide

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Welcome



Welcome to **RecDesk Director** online help. Here you will find all you need to get started with RecDesk and begin managing your organization's day to day operations. If you have further questions and do not find the answers here, please send an email to support@recdesk.com and we'll be sure to get you the information you need.

Getting Started

Getting started with RecDesk is **easy**. One way to do it is to *jump right in* and start adding your *Programs, Facilities and Memberships*. You'll find the layout and flow of RecDesk very intuitive and easy to use. Don't worry, ***you're not going to break anything*** and if you make a mistake you can simply go back and perform another edit and save. For those of you who prefer a bit more of guidance, here's our recommended list of things to do:

- Set up your Custom Lists - see [Managing Custom Lists](#)
- Create your Facilities - see [Creating and Modifying Facilities](#)
- Add Some Programs - See [Creating and Modifying Programs](#)
- Create Membership Definitions (if applicable) - See [Creating and Modifying Membership Definitions](#)
- Practice registering people for Programs - see [Registering people for programs](#)
- Try reserving a Facility - see [Reserving Facilities](#)
- Enroll someone in a Membership - see [Enrolling Members](#)
- Add some more Administrators to RecDesk (you deserve some Help!) - see [Adding RecDesk Users](#)
- Print out some Reports

Have at it and have fun!

Master Calendar

One of the central features of RecDesk is the **Master Calendar**. This offers you a high-level overview of what is going on at your organization at any given point in time. It tracks *Program schedule dates*, general *Facility Reservations* and Member initiated *Facility Reservations*. There are *Monthly*, *Weekly* and *Daily* views. Each Facility also has its own more focused **Usage Calendar**, similar to the Master Calendar. See [Facility Usage Calendar](#).

Master Calendar Monthly View

The screenshot shows the RecDesk Master Calendar Monthly View for November 2011. The interface includes a top navigation bar with tabs for Dashboard, Programs, Memberships, Facilities, Members, Leagues, Registration, Money, Reports, and Admin. Below the navigation bar, the current date is Friday, March 22, 2013. The calendar view is for November 2011, with a 'Jump to' dropdown set to March 2013. The calendar grid shows events for each day of the month, color-coded by reservation type: General Reservation (blue), Program Related (green), and Member Reservation (orange). A 'Calendar Key' on the right side explains these colors. The right sidebar contains links to Master Calendar, Print Version, Quick Actions, Shopping Cart (0 pending item(s)), and a user dropdown for RAdmin.

rec desk Oakridge Parks & Recreation

Dashboard Programs Memberships Facilities Members Leagues Registration Money Reports Admin

Master Calendar

Today is Friday, March 22, 2013 Master Calendar

Jump to: March 2013 Go

today month week day

November 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30 Reserve	31 3p Girl's Middle School Soccer (Oakridge Youth Soccer Field)	1 10a Boy Scout Outing (First District Park) 3p Girl's Middle School Soccer (Oakridge Youth Soccer Field)	2 3p Girl's Middle School Soccer (Oakridge Youth Soccer Field)	3 10a Boy Scout Outing (First District Park) 3p Girl's Middle School Soccer (Oakridge Youth Soccer Field)	4 Reserve	5 11a Mill Heritage Tours (Oakridge Youth Soccer Field) 2p Weekly Bowling League (Local Bowling Alley) 6p High School Band Concert (First District Park)
6 Reserve	7 8a Holiday Tree Ornaments Workshop (ages 6-8) - Seaso (Local Bowling Alley) 10a Holiday Tree Ornaments Workshop (ages 6-8) (The Community House) 3p Girl's Middle School Soccer (Oakridge Youth Soccer Field)	8 8a Holiday Tree Ornaments Workshop (ages 6-8) - Seaso (Local Bowling Alley) 12p Boy Scout Monthly Meeting (The Community House) 3p Girl's Middle School Soccer (Oakridge Youth Soccer Field)	9 10a Holiday Tree Ornaments Workshop (ages 6-8) (The Community House)	10 Reserve	11 10a Holiday Tree Ornaments Workshop (ages 6-8) (The Community House)	12 10a Mill Heritage Tours (First District Park) 2p High School Band Concert (First District Park) 2p Weekly Bowling League (Local Bowling Alley)

Calendar Key

- General Reservation
- Program Related
- Member Reservation

Master Calendar

Print Version

Quick Actions

Shopping Cart
0 pending item(s)

RAdmin

Master Calendar Weekly View

Jump to: March 2013 Go

  today

Oct 30 — Nov 5 2011

month week day

	Sun 10/30	Mon 10/31	Tue 11/1	Wed 11/2	Thu 11/3	Fri 11/4	Sat 11/5
all-day	Reserve	Reserve	Reserve	Reserve	Reserve	Reserve	Reserve
9am							
10am			10:00 - 1:00 Boy Scout Outing (First District Park)		10:00 - 1:00 Boy Scout Outing (First District Park)		
11am							11:00 - 1:00 Mill Heritage Tours (Oakridge Youth Soccer Field)
12pm							
1pm							
2pm							2:00 - 4:00 Weekly Bowling League (Local Bowling Alley)
3pm		3:00 - 5:00 Girl's Middle School Soccer (Oakridge Youth Soccer Field)	3:00 - 5:00 Girl's Middle School Soccer (Oakridge Youth Soccer Field)	3:00 - 5:00 Girl's Middle School Soccer (Oakridge Youth Soccer Field)	3:00 - 5:00 Girl's Middle School Soccer (Oakridge Youth Soccer Field)		
4pm							
5pm							

 Master Calendar Print Version Quick Actions  Shopping Cart

0 pending item(s)

 RAdmin 

Calendar Key

General Reservation

Program Related

Member Reservation

Frequently Asked Questions

Program and Registration Related FAQs

How do I copy (clone) a Program?

You can copy/clone a Program to create a new one. It will copy all Program attributes (including Fees plus Custom Questions) but will not copy over schedule or roster information. Here's how to do it.

1. Select the Program from the Program List page
2. Put the Program into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Click on the Create **New Program Exactly Like This One** button
4. Change any attributes that need changing and click **Save**

How do I transfer someone from one Program to another?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
4. Select the Transfer to another program button at the bottom-right
5. A drop down list of active Programs will appear. Select the appropriate Program and click **OK**.

How do I switch a registration from one family member to another?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
4. Select the desired family member from the *Family Member* drop down list and click **Save**.

How do I cancel a Program Registration?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have a **Remove** button to the right-most side of the row. Click the button.
4. Be sure to click through to the Payment link after cancelling the registration to issue a refund.

How do I update responses to Custom Questions on registrations?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
4. Update the Custom Question answers as appropriate and click **Save**.

Member Related FAQs

How do I combine (merge) duplicate Member accounts?

Over time, duplicate Member accounts may be created for the same Member. Combining duplicate accounts is easy:

1. Go to the Member tab and search by Last Name for the Member you would like to merge into another **
2. Select that Member and then click the **Edit** button to put that Member into *Edit Mode*
3. Click on the **Merge this Duplicate Member With Another** button at the bottom-right
4. Enter the first few characters of the last name of the Member being merged to and select it from the list. Click on the **Merge Now** button. That's it. Please note that this action cannot be reversed so please pay careful attention to the profiles being merged from/to!

**** Please not that if one of the accounts has a RecDesk Community portal Login ID and Password associated with it that the customer still uses, this is the account the duplicate should be merged into. Otherwise, the RecDesk Community login credentials will no longer be valid.**

How do I assign a RecDesk Community User Id and Password to someone who was initially entered into RecDesk in-house (via RecDesk Director)

1. Go to the Member tab and search by Last Name for the Member you would like to assign an online Id to
2. Select that Member and then click the **Edit** button to put that Member into *Edit Mode*
3. Click on the **Create Online Id For RecDesk Community Site** button all the way at the bottom
4. Enter the desired **User Name** and **Password** and click **Save**
5. Communicate what the User Name and Password is to the member

How do I set up the criteria to determine Resident versus Nonresident

See [Setting Up Residency Requirements](#)

Money Related FAQs

What are Partial Payments

Partial Payments allow you to defer all or a portion of a Payment for collection at a later date. See [Partial Payments](#).

How do process payments that are for incidental things (not Registrations/Reservations/Memberships)

See [Receive Payment](#)

What's the difference between the *RecDesk Credit Card* payment method versus the *Internal Credit Card* one?

The **RecDesk Credit Card** payment method is the one that will allow for integrated credit card processing against your merchant account. This is the most commonly used method for credit card payments.

The **Internal Credit Card** method is for recording credit card payments that are performed using legacy methods such as a card swipe in your office using older equipment or for something such as Square if your taking mobile payments for certain things. Internal Credit Card payments **are not** processed through RecDesk, but specifying this payment method allows you to record and track these transaction in RecDesk.

Administrative Related FAQs

How do I create new Users for RecDesk Director?

See [Adding RecDesk Users](#)

Programs and Registrations

The Program List

The **Program List** page shows all *Current & Future Programs* by default. This would be any Program that has at least one date on its schedule that is greater than or equal to today. Programs that have not had a schedule set up for them will also appear here.

Previous Programs can be viewed by selecting Past Programs from the Program Period drop down. For a complete list of fields on the Program List page see [Program List Fields](#)

rec desk Oakridge Parks & Recreation

Dashboard Programs Memberships Facilities Members Leagues Registration Money Reports Admin

Program List Add New Program

Today is Thursday, March 21, 2013 Program List

Program Period: Current & Future Program Type: -All-

Add New Program

25 records per page Search:

Program Name	Start Date	Ages	Grades	Openings	Currently
A8888 - Advanced Yoga - 5-25	5/18/2012	18		50	24
ADULT-008 - SPRING - Recreational Volleyball	3/11/2013			50	2
ADULT-008 - SUMMER - Recreational Volleyball				50	0
ADULT-008 - WINTER 2013 - Recreational Volleyball				50	0
ADULT-009 - Spring Zumba	3/13/2013			30	1
Archery	4/1/2013	8		n/a	0
Belly Dancing		21		50	1
ENRICH-001 - Lego Enrichment Program	3/19/2013		2-5	15	1
F12YFY3 - Imagination Yoga - Winter 2013A	2/4/2013	3-12		20	0
FIT-001 - Intermediate Yoga - 2-20	2/21/2013			50	2
SC-0001 - Intermediate Scuba - March 2013	3/8/2013			50	0
sss - Winter Frisbee Golf	12/16/2012			100	4

Master Calendar

Print Version

Quick Actions

Shopping Cart 0 pending item(s)

RDAdmin

Filtering Programs

Programs can be filtered in one of two ways (or in combination).

- **Program Period** - select All, Current & Future or Past Programs from the Program Period drop down
- **Inline Filter** - Simply start entering characters into the Search field and the list will be filtered immediately

Program Period

Current & Future

Program Type

-All-

Add New Program

Export List to Excel

25 records per page

Search: poo

Program Name	Start Date	Ages	Grades	Openings	Currently	
P99 - Pool Party - Copied	11/3/2012	18		50	12	Register
P99 - Pool Party Program	10/15/2012	18		50	45	Register

Creating and Modifying Programs

Adding **new Programs** and modifying existing ones begins on the [The Program List](#) page. To add a new Program, click on *Add New Program* from the Program submenu or the *Add New Program* Button. To **modify and existing Program**, simply click on it from the Program List page and click the Edit button.

Prerequisites - Before adding a Program, you should create *Program Types, Fee Types and General Ledger Accounts* that are appropriate for you organization. See [Managing Custom Lists](#).

For a complete list of Program related attributes see [Program Fields](#).

Basic Workflow

- Assign the Program a Name, Program Type and optionally, a Subtype and/or Custom Program Code
- If you would like the Program to be available for **Online Registration** make sure the *Online Registration* and *Show on Portal* checkboxes are checked
- If you would like **Online Registration** to only be available for specific *window of time*, enter an *Enrollment Begin Date* and/or *Enrollment End Date*. These dates only impact Online Registration. You will always be able to register individuals in-house (via RecDesk Director) at any time.
- Enter an instructor (optional) and Description for the Program. The public will see the **Description** on the RecDesk Community portal.
- You may optionally assign a GL Account code to this Program
- **Demographics**
 - This section allows you to communicate what demographic this Program is targeted towards. All attributes in this section are optional and are for informational purposes only (with the exception of **Enrollment Maximum** - see below)
 - If you enter a value into **Enrollment Maximum**, online registration will be cut off as soon as that limit is reached. Prospective registrants will be given the option to get on a **Wait List**. Enrollment beyond the *Enrollment Maximum* limit can be performed in-house within RecDesk Director.
- **Fees** - Up to 12 different fees may be assigned to a Program (Resident, Non-resident etc)
 - You can choose whether or not a Fee appears on the RecDesk Community portal side by simply checking or unchecking the Show Fee on Portal checkbox. You may opt to allow processing of scholarship or special rate fees by mail-in or in-house registrations only.
 - Fees can be set to be applicable to **Only Residents** or **Only Nonresidents**. See [Setting Up Residency Requirements](#)

- **Custom Questions** - Custom Questions are used to collect further information from registrants at the time of registration. A common Custom Question might be: *What is your t-shirt size?* Responses to these questions then appear on the Detailed Roster. See the Custom Questions section of [Program Fields](#) for more detailed information.

Example of defining a Custom Question for asking t-shirt size

Custom Form Questions

Question Type

1. Text Box

Label:

What is your favorite song?

Required:

☒

2. Drop Down List

Label:

What is your T-shirt size?

Values:

S;M;L;XL

(Enter allowable values for drop down separated by semicolons above. For example S;M;L;XL)

Default:

L

(Enter the value you would like preselected from the values list above or leave blank. For example XL)

Required:

☒

- Click **Save**
- Continue on to [Program Schedules](#)

Program Schedules

Once you have created your initial Program definition, it is time to create a schedule for the Program. This allows you to not only assign dates and times the Program but also what Facility(ies) those dates and times are associated with. These dates will then appear on the [Master Calendar](#). If updating a Schedule, select the Program from the [The Program List](#) and click on **Edit**.

Setting up a Single Date

- Click the **Add Single Date** button
- Enter a **Date**
- Enter a **Start Time**
- Select a **Facility** (optional)
- Click **OK**
- If the schedule looks good, click **Save**

Setting Up Recurring Dates

- Click the **Set Recurring Schedule** button
- Set *Start* and *End* time
- Pick the **recurrence pattern** (*Daily/Weekly/Monthly*)
 - Select details of repeating schedule. For instance, if Weekly was chosen, select the days taht apply such as M/W/F
- Select the schedule **Range** by setting a *begin date* and then either ending after a *fixed number of occurrences* or on a *specific date*
- Choose a **Facility** where this series of events will occur

- Click on **OK**
- You will be presented with a **list of schedule dates** generated from the previous steps. These have **not** been saved yet. You now have the opportunity to change or delete specific dates due to hoidays or other reasons.
- Click **Save**

Appending Dates to an Existing Schedule

By **default**, when you set up a recurring schedule **it will overwrite** the existing Schedule. In some instances you may want to simply **append** another recurring schedule to an existing one. This may be because the times/days and/or Facilities differ across the recurring dates.

To append to the schedule, simply check the **Append to existing schedule** checkbox and set up the new schedule as outlined above.

The screenshot shows a software interface with a top navigation bar containing five tabs: 'Program Info', 'Schedule', 'Roster', 'Wait List', and 'Attendance'. The 'Schedule' tab is currently selected. Below the tabs, there is a checkbox labeled 'Append to existing schedule' which is highlighted in yellow. At the bottom of the interface, there is a section titled 'Appointment Time' with a menu icon to its left.

Registering people for programs

Registering people for Programs within RecDesk Director can be initiated in one of two ways:

1. Go to [The Program List](#) page and click the **Register** button to the right of that Program
2. Click on the **Registration** tab on the main navigation bar up top

Then, once your brought to the registration page:

- Select the individual who is registering for the Program
 - If they're already in RecDesk click **Search** and then choose them from the list by clicking the **Select** button
 - or, click Add New to add member profile
- Select the **Program** from the list (it will be already selected if registration was initiated from the Program List page)
- Select the **Fee Type**. The amount will be automatically set but **can** be overridden here.
-
- Enter **Note** (optional)
- Answer any *Custom Questions* (see [Program Fields](#)) that were defined for the Program
- Click **Save**
- The registration is now in pending status and in the **Programs Cart**. At this point, more registrations can be added or you can click on the **Checkout** button to process the Payment (see below)

Dashboard

Programs

Memberships

Facilities

Members

Leagues

Registration

Money

Reports

Admin

Today is Friday, March 22, 2013

Program Registration

Export List to Excel

Member	Program	Fee	Date
J Jock	WNT-001 - Winter Frisbee Golf	\$12.00	3/22/2013

Edit

Remove

Add New Registration

Master Calendar

Print Version

Quick Actions

Shopping Cart

1 pending item(s)

Programs Cart

Checkout

RDAdmin

Auto-Fill Custom Question Responses

Custom Questions are used to collect further information from registrants at the time of registration. A common Custom Question might be: *What is your t-shirt size?* Another example might be *Who is authorized to pick your child up from camp?* The responses can be in the form of a textbox, multi-line textbox, drop down list or check box. See the Custom Questions section of [Program Fields](#) for more detailed information.

A common scenario is that many of the same custom questions are asked across different programs while registering an individual (and/or family members) for multiple programs that will be processed in the same batch (shopping cart session). As a way to facilitate entry of these responses, RecDesk provides an **Auto-Fill** Custom Question Answers button that will use previous custom question responses to pre-fill responses for new registrations in the same session.

If there are auto-fill responses available for the session, the **Auto-Fill Custom Question Answers** button will appear. Simply click that to auto-fill any previously answered custom questions of the same type (see below). The following rules apply as to what responses can be auto-populated based on previous responses:

- Must be the same custom question response type (textbox, multi-line textbox, drop down list or check box)
- The question text must be EXACTLY the same (case-sensitive)
- For drop down lists, the list of possible responses must be EXACTLY the same (case-sensitive)

Example of the Auto-Fill Custom Question Answers button on program registration

3 spots remaining

Fee Type: - Select Fee Type -

Amount:

Registration Source: In-Person

Note:

Auto-Fill Custom Question Answers

your own bathing suit?: ☒

What size are you?: XL

What is your Mom's name?:

Any medical conditions.:

Cancel

Save

Working with Rosters

You can work with the **Roster** of a particular Program by selecting that Program from the [Program List](#) page and then clicking on the Roster tab. The Roster is an alphabetized list of all program registrants.

Printing Rosters

- Click on the **Actions** button
- Select *Simple Roster* or *Detailed Roster*
- The report will appear and can then be printed or exported to a PDF, Word or Excel

Exporting Rosters to Excel

- Simple Roster export - click on the **Export List to Excel** button
- Detailed Roster export
 - Click on the **Actions** button
 - Select Show All Columns
 - click on the **Export List to Excel** button

Emailing Program Participants

- Click on the **Actions** button
- Option 1: **Email All Participants**
 - This will open up your *default email client* (i.e. Outlook, Outlook Express) and pre-fill the To: list with the email addresses of all participants and any family member that is designated as Head of Household
 - Type email and send as you normally would
- Option 2: **Show Email Addresses**
 - This will open a pop-up with the email addresses of all participants and any family member that is designated as Head of Household. You can then copy/paste this list as required

Updating Roster Entries

Individual Roster entries (including answers to Custom Questions and registered Family Member) can be updated by placing the Roster into Edit Mode

- Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
- Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
- Update the appropriate fields and click **Save**

Roster in Edit Mode

Program Info
Schedule
Roster
Wait List
Attendance

WNT-001 - Winter Frisbee Golf

Actions
Export List to Excel

	Name	Address	City	Birth Date				
1	Johnson22, Bill	123 Soapy Lane	Oakridge	1/1/1971	Payment	Edit	Remove	I ✉
2	Smith, Fred	12 Main Street	Oakridge	1/1/2000	Payment	Edit	Remove	I ✉
3	Smith, Harry	12 Main Street	Esat	1/1/2001	Payment	Edit	Remove	I ✉
4	Smith, Little Billy	12 Main Street	Oakridge	1/1/2006	Payment	Edit	Remove	I ✉

Cancelling Registrations

- Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
- Each entry on the *Roster* will now have a **Remove** button to the right-most side of the row. Click the button.

Wait Lists

When a Program is **full** (reached *Enrollment Maximum* - see [Program Fields](#)), you can Add prospective registrants to a **Wait List** by going to that Program and clicking on the *Wait List* tab. Click the **Add to Wait List** button, type in the first few characters of the member's Last Name and choose them from the drop down list. Member's will be added to the list in the order they're entered.

If a spot then opens up, you can initiate a Registration from the Wait List by clicking on the **Register** button and following the workflow at [Registering people for programs](#). Once the registration has been processed by going through the checkout process it will automatically be removed from the Wait List.

Program Expense Tracking

RecDesk gives you the ability to track **expenses** (ties back to [GL Account Codes](#)) for purposes of reporting on full Profit and Loss (P&L) on your Programs. To record an expense, simply navigate to the Program from the [Program List](#). Once there, click on the expenses tab as shown below. You will then be able to Add/Edit/Delete Expenses as required.

Program InfoScheduleRosterWait ListExpensesAttendance

Afternoon Pilates

Total Expenses: **\$140.00**

Description	Expense Code	Date	Amount	
Room rental	002-6511 - Miscellaneous	4/17/2013	\$15.00	<div>EditRemove</div>
Instructor Fees	002-6511 - Miscellaneous	4/18/2013	\$125.00	<div>EditRemove</div>

Add New

Taking Attendance

You can take attendance for a given schedule date of a Program by going to that Program and clicking on the **Attendance** tab. Select the **Take Attendance** link to the right of the date you want to take attendance for. There will then be a two column list. On the left will be all registered members of the program. Click the **Add** button to mark them as attended and move them to the *Attendees* column. Clicking the Remove button will take them off the Attendees list and place them back into the Eligible Registrants list.

Appendix

Program List Fields

Program List Fields

- **Program Name** - Name assigned to the Program
- **Start Date** - The first calendar date on the Program's schedule
- **Ages** - Targeted age group (if specified)
- **Grades** - Targeted age group (if specified)
- **Openings** - Maximum Enrollment
- **Currently** - Current Number of Registrants

Program Fields

Program Fields

General

- **ID** - Internal RecDesk Id assigned to Program
- **Name** - Descriptive name given to Program
- **Program Type** - The Program Type assigned to this Program. Program Types allow you to organize programs in a way that makes sense for your organization. See [Managing Custom Lists](#)
- **Program Subtype** - Further way to categorize Programs. See [Managing Custom Lists](#)
- **Custom Program Code** - This is an optional code that you can assign to a Program. It usually corresponds to a catalog/brochure Id or it can be used to give contextual information around season or year.
- **Online Registration** - Check this box to make Program available for online registration. Default is checked.
- **Show on Portal** - Check this box to make Program appear on RecDesk Community portal. Default is checked.
- **Show on Calendar** - Check this box to make Program schedule appear on the Director and Community master calendars. It is most often checked, but may be unchecked if you're using a Program to track registrations/usage outside of the normal workflow. Default is checked.
- **Enrollment Begin Date** - The date when online registration is opened to the public. If this is left blank, online registration will be available up until the last scheduled date of the Program.
- **Enrollment End Date** - The date when online registration is closed to the public. If this is left blank, online registration will be available up until the last scheduled date of the Program.
- **Instructor** - Name of instructor

- **Description** - Brief description of the Program

Accounting

- **General Ledger Account** - The GL Account associated with this Program. See [Managing Custom Lists](#)

Demographics

- **Gender** - Male or Female. Informational only.
- **Enrollment Minimum** - Minimum number of people required for Program to be implemented. Informational only.
- **Enrollment Maximum** - The maximum number of persons allowed to register for a Program. Once this maximum has been reached, online registration will no longer be available and registrants will be allowed to get onto a Wait List.
- **Grade Minimum** - Target minimum grade. Informational only.
- **Grade Maximum** - Target maximum grade. Informational only.
- **Age Minimum** - Target minimum age. Informational only.
- **Age Maximum** - Target minimum age. Informational only.

Fees

- **Fee Type** - The Fee Type assigned to this fee. See [Managing Custom Lists](#)
- **Amount** - The dollar amount of the fee.
- **Show on Portal** - If checked, this Fee will appear on the Community Portal for online registrants to see. If left unchecked, it will be able to be used internally in RecDesk Director but not on the Community Portal. An example of when it might be left unchecked is for a *Scholarship* type fee that requires some form of verification before registering.

- **Residency Restriction** - Options are: *None*, *Residents Only* and *Nonresidents Only* (Default *None*)

Custom Questions

Custom Questions are used to collect further information from registrants at the time of registration. A common Custom Question might be: *What is your t-shirt size?* Responses to these questions then appear on the Detailed Roster. There are four distinct flavors of Custom Questions depending upon the nature of the question. Answers can be in the form of:

Text Box - Simple free form answer.

- **Label** - The question being asked
- **Required** - Check this to require a response

Multi-Line Text Box - Simple free form, multi-line answer.

- **Label** - The question being asked
- **Required** - Check this to require a response

Drop Down List - A pick list of answers (i.e. t-shirt size: S,M,L,XL)

- **Label** - The question being asked
- **Values** - A semicolon delimited list of possible answers. At registration time, this list is transformed into a drop down list. A sample list of values for our t-shirt drop down might be: **S;M;L;XL**
- **Default** - A default value for the drop down list. It must be one of the values in the semicolon delimited list above. For example, **XL**.
- **Required** - Check this to require a response

Checkbox - A simple Yes/No answer

- **Label** - The question being asked
- **Checked** - Select checked to default response to *checked*.

- **Required** - Check this to require a response

Memberships

The Memberships List

The Membership **List** page shows all *Current & Future Membership Definitions* by default. These would be any Membership that has a Membership Period of Open (Ongoing) or a Membership Period of Definitive Start and End Date with an End Date greater than or equal to today. Previous Membership Definitions can be viewed by selecting Past Memberships from the Membership Period drop down.

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Oakridge Parks & Recreation

DashboardProgramsMembershipsFacilitiesMembersLeaguesRegistrationMoneyReportsAdmin

Memberships ListAdd New Membership TypeAdd New Membership Member

Today is Saturday, March 23, 2013Memberships List

Membership PeriodCurrent & Future

Add New Membership Type

Export List to Excel

25 records per page

Search:

Program Name	Active Members	
Fitness Center - Annual Membership	3	Membership List
Fitness Center - Mini Plan	1	Membership List
Fitness Center - Monthly	3	Membership List
Outdoor Volleyball	1	Membership List
Pool Membership 2013	0	Membership List
Pool Membership 2013B	0	Membership List
Rec Center Annual	4	Membership List
Summer 2013 Pool Membership	0	Membership List
Winter 2013 Pool Membership	0	Membership List
Youth Swim Lessons	1	Membership List

Showing 1 to 10 of 10 entries

Previous1Next

Master Calendar

Print Version

Quick Actions

Shopping Cart0 pending item(s)

RAdmin

Creating and Modifying Membership Definitions

Adding **new Membership Definitions** and modifying existing ones begins on the [The Membership List](#) page. To add a new Membership Definition, click on *Add New Membership Type* from the Memberships submenu or the *Add New Membership Type* Button. To **modify and existing Membership Type**, simply click on it from the Membership List page and click the *Edit* button.

Prerequisites - Before adding a new Membership Definition, you should create *Program/Membership Types*, *Fee Types* and *General Ledger Accounts* that are appropriate for you organization. See [Managing Custom Lists](#).

For a complete list of Membership Definition related attributes see [Membership Definition Fields](#).

Basic Workflow

- Assign it a *Name* (i.e. *Summer 2013 Pool Membership*), *Membership Type* and optionally, a *Subtype* and/or *Custom Membership Code*
- Set the **Membership Period**. For things such as Rec Center Membership types, it may not have an end date and be considered *Open*. A seasonal Pool Membership would probably be set to *Definitive Start and End Date*.
 - **Open** (Ongoing) - Select this if the Membership is ongoing
 - **Definitive Start and End Date** - Select this for Memberships that are seasonal in nature (i.e. Beach Membership, Student Gym Membership)
 - Set the Begin Date and End Date
- Set the *Default Membership Duration* - This determines what the default duration of the membership is when you enroll new Members. There are two components: a **number** and a **time type** component (*Day(s)*, *Week(s)*, *Month(s)*, *Year(s)*). As an example, if you set this to **6 Month(s)** and a member enrolls on 2/1/2013, the initial start and end dates for their membership will be **2/1/2013 - 7/31/2013**. This can be overridden.
- If you would like the Membership to be available for **Online Enrollment** make sure the *Online Enrollment* and *Show on Portal* checkboxes are checked
- If you would like **Online Enrollment** to only be available for specific *window of time*, enter an *Enrollment Begin Date* and/or *Enrollment End Date*. These dates only impact Online Enrollment. You will always be able to enroll individuals in-house (via RecDesk Director) at any time.
- Enter a Description for the Membership Definition. The public will see the **Description** on the RecDesk Community portal.
- You may optionally assign a GL Account code to this Membership

- **Demographics**

- This section allows you to communicate what demographic this Membership is targeted towards. All attributes in this section are optional and are for informational purposes only (with the exception of **Enrollment Maximum** - see below)
- If you enter a value into **Enrollment Maximum**, online enrollment will be cut off as soon as that limit is reached.

- **Fees** - Up to 12 different fees may be assigned to a Program (Resident, Non-resident etc)
 - You can choose whether or not a Fee appears on the RecDesk Community portal side by simply checking or unchecking the Show Fee on Portal checkbox. You may opt to allow processing of scholarship or special rate fees by mail-in or in-house registrations only.
 - By default, 1 Member is allowed per membership. For things such as **Group or Family Memberships**, this may be overridden by entering the appropriate maximum number of Members in the **Includes up to ____ person(s)** text box.
 - Fees can be set to be applicable to **Only Residents** or **Only Nonresidents**. See [Setting Up Residency Requirements](#)

- Click **Save**

Enrolling Members

New *Membership Members* can be created by selecting **Add New Membership** submenu option off of the *Memberships* tab. See [Membership Enrollment Fields](#) for a full list of fields on this page. The general work flow for enrolling new Membership Members is:

- Select a *Membership* from the Membership drop down list
- Choose a *Fee Type*.
- Change default *Start/End* dates of Membership instance if required.
- Add an optional *Note*
- Select the Member to enroll by clicking Add New Member
- If more than one Member is allowed for the selected Fee Type, repeat step 5 to add more Members to Membership

Working with Membership Members

You can **View, Edit and Renew** Membership Members at any time by going to the [The Memberships List](#) page, selecting the appropriate Membership and then clicking the *Members* tab. This is essentially the **roster of Members**. By default, it will list all *Active Members*. You can also view *Future, Expired and Cancelled Memberships* by selecting that value from the Membership Status Drop Down.

The screenshot shows the 'rec desk' web application interface. The top navigation bar includes tabs for Dashboard, Programs, Memberships (selected), Facilities, Members, Leagues, Registration, Money, Reports, and Admin. Below this, there are links for 'Memberships List', 'Add New Membership Type', and 'Add New Membership Member'. The date 'Today is Saturday, March 23, 2013' is displayed on the left, and 'Membership Members' is on the right. The main content area is titled 'Rec Center Annual' and features a 'Membership Status' dropdown set to 'Active', a 'Show All Members' dropdown, and buttons for 'Actions' and 'Export List to Excel'. A 'records per page' selector is set to 25, and there is a search bar. The table below lists four members: Mary Morris (Member Id 12345), Ryan Morris (Member Id 2500001, Primary Member), Sophie Morris (Member Id 2500001), and Mickey Mouse (Member Id 01, Primary Member). Each row shows the membership period and a button to 'Renew' or 'Renewed'. The bottom of the table shows 'Showing 1 to 4 of 4 entries' and navigation buttons for 'Previous', '1', and 'Next'.

Member	Member Id	Is Primary	Membership Period	Action
Morris, Mary	12345		2/26/2013 - 2/25/2014	Renewed
Morris, Ryan	2500001	Primary Member	2/26/2013 - 2/25/2014	Renewed
Morris, Sophie	2500001		2/26/2013 - 2/25/2014	Renewed
Mouse, Mickey	01	Primary Member	3/13/2013 - 3/12/2014	Renew

[View Membership Details](#) - Click on the Member name

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DashboardProgramsMembershipsFacilitiesMembersLeaguesRegistrationMoneyReportsAdmin

Memberships ListAdd New Membership TypeAdd New Membership Member

Today is Saturday, March 23, 2013View Membership

Membership TypeMembersMembership Check-ins

Return to Membership List

Edit

Rec Center Annual

Id: 13

Status: **Active** [Go to Payment for this Membership](#)

Start Date: 2/26/2013

End Date: 2/25/2014

Source:

Fee: Family - \$300.00

Create Date: 2/26/2013

Note:

Members

Name

Ryan MorrisPrimary Member

Mary Morris

Sophie Morris

Master Calendar

Print Version

Quick Actions

Shopping Cart

0 pending item(s)

RDAdmin

Editing Membership Details

To edit a membership, simply click on the **Edit** button while viewing the Membership Details as shown above

Appendix

<TODO>: Insert description text here... And don't forget to add keyword for this topic

Membership Definition Fields

Membership Definition Fields

General

- **Active Members** - Number of currently active members
- **ID** - Internal RecDesk Id assigned to Membership
- **Name** - Descriptive name given to Membership
- **Membership Type** - The Membership Type (same as Program Type) assigned to this Membership. Membership Types allow you to organize programs in a way that makes sense for your organization. See [Managing Custom Lists](#)
- **Custom Membership Code** - This is an optional code that you can assign to a Membership. It usually corresponds to a catalog/brochure Id or it can be used to give contextual information around season or year.
- **Membership Period** - The *period* that the Membership definition is good for. For things such as Rec Center Membership types, it may not have an end date and be considered *Open*. A seasonal Pool Membership would probably be set to *Definitive Start and End Date*.
 - **Open** (Ongoing) - Select this if the Membership is ongoing
 - **Definitive Start and End Date** - Select this for Memberships that are seasonal in nature (i.e. Beach Membership, Student Gym Membership)
- **Default Membership Duration** - This will be the *default* duration of the Membership that is assigned when enrolling new Members. It can be defined in terms of Days, Weeks, Months or Years.
- **Online Registration** - Check this box to make Membership available for online registration. Default is checked.
- **Show on Portal** - Check this box to make Membership appear on RecDesk Community portal. Default is checked.
- **Enrollment Begin Date** - The date when online enrollment is opened to the public.

- **Enrollment End Date** - The date when online enrollment is closed to the public.
- **Description** - Brief description of the Membership

Accounting

- **General Ledger Account** - The GL Account associated with this Program. See [Managing Custom Lists](#)

Demographics

- **Gender** - Male or Female. Informational only.
- **Enrollment Minimum** - Minimum number of people required for Program to be implemented. Informational only.
- **Enrollment Maximum** - The maximum number of Active memberships for a Membership. Once this maximum has been reached, online enrollment will no longer be available.
- **Grade Minimum** - Target minimum grade. Informational only.
- **Grade Maximum** - Target maximum grade. Informational only.
- **Age Minimum** - Target minimum age. Informational only.
- **Age Maximum** - Target minimum age. Informational only.

Fees

- **Fee Type** - The Fee Type assigned to this fee. See [Managing Custom Lists](#)
- **Amount** - The dollar amount of the fee.
- **Includes up to** - The number of people allowed per Membership. The default is **1**. As an example, you may have a Fee Type called *Family Membership* that allows **5**.

- **Show on Portal** - If checked, this Fee will appear on the Community Portal for online registrants to see. If left unchecked, it will be able to be used internally in RecDesk Director but not on the Community Portal. An example of when it might be left unchecked is for a *Scholarship* type fee that requires some form of verification before registering.
- **Residency Restriction** - Options are: *None*, *Residents Only* and *Nonresidents Only* (Default *None*)

Membership Enrollment Fields

Membership Enrollment Fields

General

- **Membership** - The Membership chosen for this Membership enrollment
- **Fee Type** - Membership Fee Type
- **Start Date** - Date when this Membership instance begins
- **End Date** - Date when the Membership instance expires
- **Note** - Note assigned to this Membership instance

Members

The Members section contains all Members (people) associated with a particular Membership instance

Facilities and Reservations

The Facility List

The **Facility List** contains all facilities you've added for your organization. You can view the whole list or filter by *Facility Type*. To go to the Facility List simply click on the **Facilities** tab.

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Oakridge Parks & Recreation

Dashboard

Programs

Memberships

Facilities

Members

Leagues

Registration

Money

Reports

Admin

Facility List

Reserve Facility

Permitting Templates

Add New Facility

Attended Check In

Self Check In

Today is Monday, March 25, 2013

Facility List

Facility Type: -All-

Search

Add New Facility

Export List to Excel

10 records per page

Search:

Name	Address	City	
Activity Center	28 White Birch Rd	East Hampton	Usage
Brandon Field	28 White Birch Rd	Northfield	Usage
Brownsville Sports Park	Main Street	Brownsville	Usage
City Park	28 White Birch Rd	East Hampton	Usage
Curriculum	Main St	New Haven	Usage
Elm Park Basketball Courts	676 Main Street	Oakridge	Usage
Family Life Center - Main Gym II	28 Main Street	Charleston	Usage
First District Park	1200 Main Street	Oakridge	Usage
Greenville Aquatics	1234 Greenville Lane	Greenville	Usage
Hoffman Hall	12 Main Street	East Hampton	Usage

Showing 1 to 10 of 21 entries

← Previous

1

2

3

Next →

Master Calendar

Print Version

Quick Actions

Shopping Cart

0 pending item(s)

RAdmin

Creating and Modifying Facilities

Adding **new Facilities** and modifying existing ones begins on the [The Facility List](#) page. To add a new Facility, click on *Add New Facility* from the Facilities submenu or the *Add New Facility* Button. To **modify and existing Facility**, simply click on it from the Facility List page and click the Edit button.

Prerequisites - Before adding a Facility, you should create *Facility Types and General Ledger Accounts* that are appropriate for you organization. See [Managing Custom Lists](#).

For a complete list of Facility related attributes see [Facility Fields](#)

Basic Workflow

- Assign the Facility a Name and a Facility Type
- If this is a **Primary Facility** (see [Facility Fields](#)), then check the Primary Facility check box
- If this Facility is part of a larger Facility, select that Facility from the **Parent Facility** drop down
- Enter **Address Line 1, Address Line 2, City, State** and **Zip Code**
- If you want to associate General Ledger Accounts with reservations for this Facility, select the appropriate accounts from the **Default GL Account - Fee** and **Default GL Account - Deposit** drop downs
- Enter a **Description, Note** and **Capacity**
- Check/Uncheck **Show Facility on Portal, Show Hours on Portal** and **Show Calendar on Portal checkboxes**
- (Optionally) Choose a **Permitting Template** to associate with reservations for this facility
- Select **Hours of Operation**
- Click **Save**

Reserving Facilities

Facilities can be reserved by navigating to the **Facilities** tab and clicking **Reserve Facility** from the submenu. Alternatively, you can go a specific Facility's [Facility Usage Calendar](#) and click on **Reserve Facility** for a particular date. The advantage of the latter way is that the Facility and Date will be preselected.

For a complete list of Facility Reservation related attributes see [Facility Reservation Fields](#)

Basic Workflow

- Select the **Facility** to be reserved and enter the **Use**
- Set **Start Time** and **End Time**
- If reservation is for the entire day, check the **All Day** checkbox
- If this is a *Repeating* reservation check the **Repeat** checkbox
 - If **Daily** selected
 - Choose the *Repeats every* interval
 - Set the **Ends after** occurrences or **Ends by** date
 - If **Weekly** selected
 - Choose the *Repeats every n weeks* interval
 - Select the **days** that it repeats
 - Set the **Ends after** occurrences or **Ends by** date
 - If **Monthly** selected
 - Choose the *Repeats every n months* interval
 - Select the **Repeat by** option
 - Set the **Ends after** occurrences or **Ends by** date
- Set **Group Size** (optional)
- Enter **Description**
- If this reservation is being made by/for a Member, select them (optional) now
 - If they're already in RecDesk click **Search** and then choose them from the list by clicking the **Select** button
 - or, click Add New to add member profile
- If a **Fee** is being collected for the Reservation, check the Fee Required checkbox, set Fee Type and enter the *Fee Amount* plus *Security Deposit*.

- Click on **Continue**

- You will then be presented with the details of the reservation. You may add/remove/update specific dates at this point to account for holidays or other exceptions in a **repeating schedule**. Click **Remove** to delete a particular date and **Edit** to update the time details of a specific date.

Facility Reservation Review

Facility Reservation Detail

City Park

Use: Birthday Party

Start Date	Day	Start Time	End Time		
3/25/2013	Monday	8:00 AM	8:00 AM	Edit	Remove
3/26/2013	Tuesday	8:00 AM	8:00 AM	Edit	Remove
3/27/2013	Wednesday	8:00 AM	8:00 AM	Edit	Remove
4/1/2013	Monday	8:00 AM	8:00 AM	Edit	Remove
4/2/2013	Tuesday	8:00 AM	8:00 AM	Edit	Remove
4/3/2013	Wednesday	8:00 AM	8:00 AM	Edit	Remove
4/8/2013	Monday	8:00 AM	8:00 AM	Edit	Remove

Go Back

Save Reservation

- Click **Save** reservation

Facility Usage Calendar

The **Facility Usage** calendar shows all activity (Programs, Reservations etc) happening at a particular Facility. This is in contrast to the [Master Calendar](#) which shows activity for **all** Programs and Facilities. To view the Facility Usage calendar for a Facility go to the facility by selecting it from the [The Facility List](#) and then clicking the Facility Usage tab.

Facility Usage Calendar

rec deskOakridge Parks & Recreation

DashboardProgramsMemberships**Facilities**MembersLeaguesRegistrationMoneyReportsAdmin

Facility ListReserve FacilityPermitting TemplatesAdd New FacilityAttended Check InSelf Check In

Today is Monday, March 25, 2013Facility Usage

Facility InfoFacility Usage**Online Reservations**Facility Check-ins

Activity Center

Jump to: March2013Go

today

April 2013

monthweekday

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31 Reserve	1 4p Volleyball Practices	2 4p Volleyball Practices	3 4p Volleyball Practices	4 4p Volleyball Practices	5 4p Volleyball Practices	6 8:30a Youth Volleyball
7 Reserve	8 4p Volleyball Practices	9 4p Volleyball Practices	10 4p Volleyball Practices	11 4p Volleyball Practices	12 4p Volleyball Practices	13 8:30a Youth Volleyball
14 Reserve	15 4p Volleyball Practices	16 3:45p Lego Enrichment Program 4p Volleyball Practices	17 4p Volleyball Practices	18 4p Volleyball Practices	19 4p Volleyball Practices	20 8:30a Youth Volleyball
21 Reserve	22 4p Volleyball Practices	23 4p Volleyball Practices	24 4p Volleyball Practices	25 4p Volleyball Practices	26 4p Volleyball Practices	27 8:30a Youth Volleyball

Master Calendar

Print Version

Quick Actions

Shopping Cart
0 pending item(s)

RAdmin

Calendar Key

General Reservation

Program Related

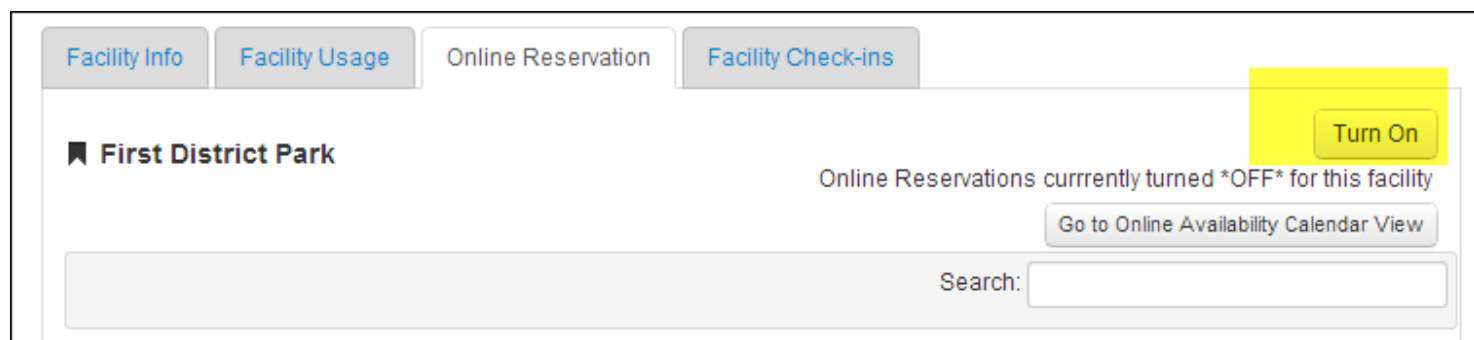
Member Reservation

Enabling Online Reservations

By default, Facilities are **not** available for *online reservations*. This feature must be explicitly activated for each facility where this is desired.

Turn On Online Reservations for the Facility

Navigate to the Facility you would like to enable Online Reservations for and click the **Turn On** button

A screenshot of a web interface for managing facilities. At the top, there are four tabs: 'Facility Info', 'Facility Usage', 'Online Reservation', and 'Facility Check-ins'. The 'Online Reservation' tab is selected. Below the tabs, the facility name 'First District Park' is displayed. To the right of the facility name, there is a status message: 'Online Reservations currently turned *OFF* for this facility'. A yellow button labeled 'Turn On' is highlighted. Below the status message, there is a button labeled 'Go to Online Availability Calendar View'. At the bottom right, there is a search bar with the label 'Search:'.

Build Availability Calendars for Online Reservations

Before people can actually reserve facilities online, **Availability Schedules** must be set up. It is these **Availability Schedules** that specify **when** (*dates and time blocks*) facilities can be reserved and for **how much** (applicable Fees).

It is common to have multiple Availability Calendars per facility - each named after the associated time block - for example **Hourly Reservations**, **Half-Day Reservations** and **Full-Day Reservations**. Naming them in this manner gives them context when members of the public see them on your *RecDesk Community* portal and when you're working with them in-house.

- To begin, click on the **Add New Availability** Calendar button
- Enter a **Name** for the Availability Calendar - it is recommended that naming schemes similar to those outlined above are used
- Enter a **Start Date** and **End Date** that this Availability Calendar is in effect for. The length can be no longer than a calendar year and is more commonly *seasonal* in nature.
- Set up the time blocks that apply to this schedule
 - Start Time, End Time and Days of Week it applies
 - Repeat this for each time block available - i.e. if it was a Half Day availability schedule, you might have two time blocks as follows:
 - **8AM - 12PM**, Monday, Tuesday, Wednesday, Thursday and Friday
 - **12:30 - 4:30PM**, Monday, Tuesday, Wednesday, Thursday and Friday

Time Blocks

1.	8 AM	:00	12 PM	:00	<input checked="" type="checkbox"/> Mon	<input checked="" type="checkbox"/> Tue	<input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Thu	<input checked="" type="checkbox"/> Fri	<input type="checkbox"/> Sat	<input type="checkbox"/> Sun
2.	12 PM	:30	4 AM	:30	<input checked="" type="checkbox"/> Mon	<input checked="" type="checkbox"/> Tue	<input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Thu	<input checked="" type="checkbox"/> Fri	<input type="checkbox"/> Sat	<input type="checkbox"/> Sun
3.	--	--	--	--	<input type="checkbox"/> Mon	<input type="checkbox"/> Tue	<input type="checkbox"/> Wed	<input type="checkbox"/> Thu	<input type="checkbox"/> Fri	<input type="checkbox"/> Sat	<input type="checkbox"/> Sun
4.	--	--	--	--	<input type="checkbox"/> Mon	<input type="checkbox"/> Tue	<input type="checkbox"/> Wed	<input type="checkbox"/> Thu	<input type="checkbox"/> Fri	<input type="checkbox"/> Sat	<input type="checkbox"/> Sun

- Assign appropriate **Fee Types**, **Fee Amounts** and **Deposit Amounts** (Fees can be set to be applicable to **Only Residents** or **Only Nonresidents**. See [Setting Up Residency Requirements](#))

Fees

Fee Type	Fee Amount	Deposit Amount
1. Individual	100	15
2. Non-resident	150	15
3. -None Selected-	0	0
4. -None Selected-	0	0

- Click **Save**
- This Facility will now have a **Reserve button** next to it on the RecDesk Community portal and the public will be able to reserve it based on the *Availability Calendars* that have been set up

Permitting Templates

Permitting Templates are used to define Permits for Facility Reservations. These are customizable depending on your organization's needs. The basic concept is can use your *own verbiage* to define permitting templates and then place **data tokens** within the template so things such as *dates and times, facility name and individual making a reservation* are inserted at report runtime.

You can have as many different permitting templates you'd like and assign them to specific facilities by selecting it from the Permitting Template drop down when [Creating and Modifying Facilities](#). To create a new Permitting Template go to the *Facilities* tab and click *Add New Facility*.

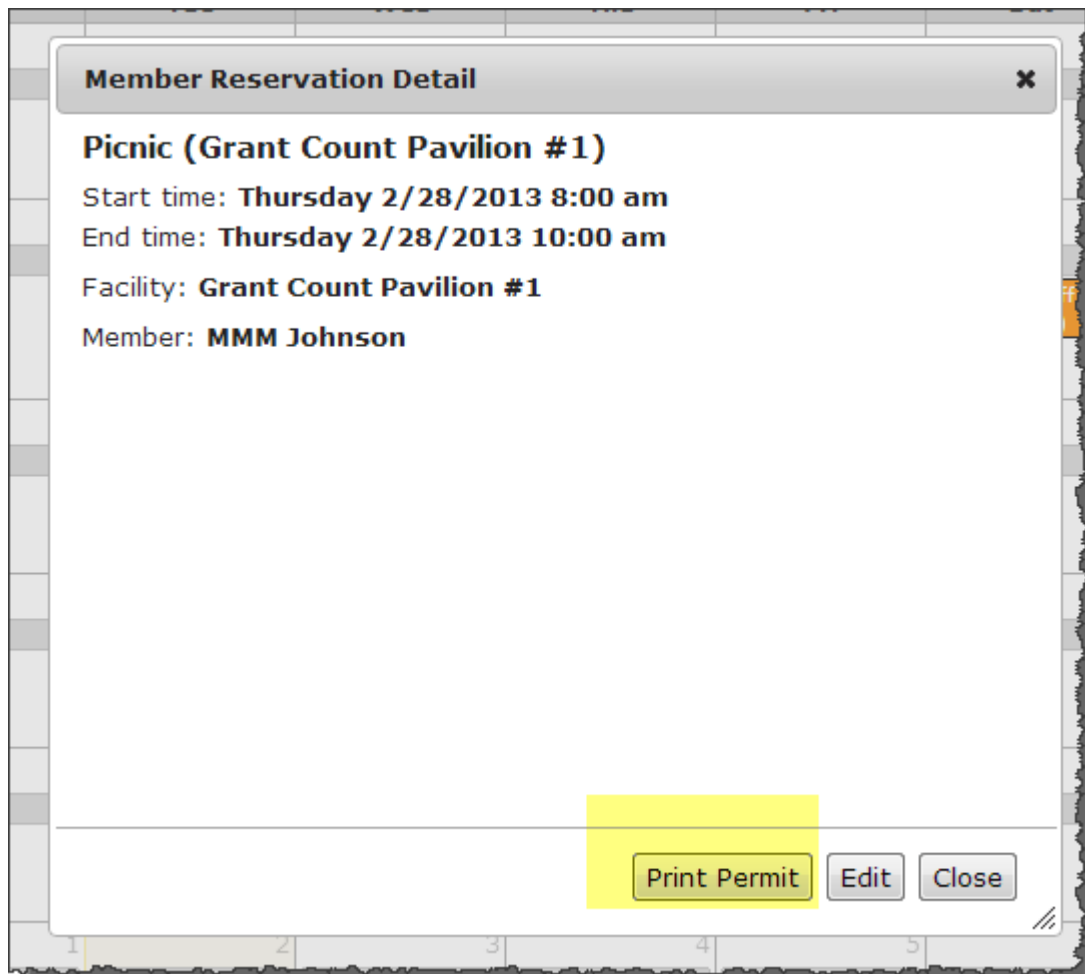
Basic Workflow for Creating Permitting Templates

- Assign a **Template Name**, **Header** and **Subheader**.
- Enter the verbiage of your template as you would like it to display in the **Body** field
 - HTML tags are accepted
- Insert available data tokens into the **Body** of your template wherever you'd like. Available *tokens* are:
 - `[OrganizationName]`
 - `[FacilityName]`
 - `[FacilityAddressLine1]`
 - `[FacilityAddressLine2]`
 - `[FacilityCity]`
 - `[FacilityState]`
 - `[FacilityZip]`
 - `[ReservationUse]`
 - `[ReservationStartTime]`
 - `[ReservationEndTime]`
 - `[ReservationGroupSize]`
 - `[AllDates]` - for multi-day reservations
 - `[MemberName]`
 - `[MemberAddressLine1]`
 - `[MemberAddressLine2]`
 - `[MemberCity]`
 - `[MemberState]`
 - `[MemberZip]`
- Click **Save**

[Assigning Permitting Templates to individual Facilities](#) - see [Creating and Modifying Facilities](#)

Printing Permits

- Locate the Reservation on the Calendar (either the [Master Calendar](#) or the [Facility Usage Calendar](#)) and click on it.
- A pop-up will appear. Click **Print Permit**.



A screenshot of a web application showing a 'Member Reservation Detail' pop-up window. The window has a title bar with the text 'Member Reservation Detail' and a close button (X). The main content area displays the following information: 'Picnic (Grant Count Pavilion #1)', 'Start time: Thursday 2/28/2013 8:00 am', 'End time: Thursday 2/28/2013 10:00 am', 'Facility: Grant Count Pavilion #1', and 'Member: MMM Johnson'. At the bottom right of the window, there are three buttons: 'Print Permit' (highlighted with a yellow background), 'Edit', and 'Close'. The window is overlaid on a calendar grid with days 1 through 5 visible at the bottom.

Member Reservation Detail ✕

Picnic (Grant Count Pavilion #1)

Start time: **Thursday 2/28/2013 8:00 am**

End time: **Thursday 2/28/2013 10:00 am**

Facility: **Grant Count Pavilion #1**

Member: **MMM Johnson**

Print Permit **Edit** **Close**

Facility Check-ins

Attended Check-In

One option for Facility check-ins is the **Attended Check-In**. This is normally used when you have someone at the **front desk** with a computer facing them and optionally, a *barcode reader/scanner* that is on the counter and accessible by the public. This allows people walking into your facility to check-in via a barcoded keyfob or id card, or, the counter person can check them in by: a) *Last name* or 2) by entering their *Member Id*.

**** NOTE:** In order for a barcode to be successfully read by the scanner while in *Attended Check-In* mode, RecDesk **must be** on the *Attended Check-In* page **and** the cursor in the **input text box**.

rec desk Oakridge Parks & Recreation

Dashboard Programs Memberships Facilities Members Leagues Registration Money Reports Admin

Facility List Reserve Facility Permitting Templates Add New Facility Attended Check In Self Check In

Today is Monday, March 25, 2013 Attended Check In

Activity Center Hide Options

Limit check-ins to Members with the following active Memberships

- ☐ Winter 2013 Pool Membership
- ☐ Pool Membership 2013
- ☐ Rec Center Annual
- ☐ Fitness Center - Annual Membership
- ☐ Pool Membership 2013B
- ☐ Fitness Center - Monthly
- ☐ Youth Swim Lessons
- ☐ Outdoor Volleyball
- ☐ Fitness Center - Mini Plan
- ☐ Summer 2013 Pool Membership

Enter Name or Unique Member Id

To check-in a guest, type **guest** or **gg** and press Enter

Go

Successful! Member check-in complete.

Recent Check Ins

Harry Smith
3/25/2013 3:10 PM

Harry Smith 3/25/2013 3:10 PM

Mike Johnson 3/25/2013 3:10 PM

Master Calendar

Print Version

Quick Actions

Shopping Cart
0 pending item(s)

RAdmin

Basic Workflow

- Select a **Facility** from the drop down
- If would like to **limit check-ins** to Members with specific *active* Memberships, select the checkboxes for those Memberships
- **Check in Members**
 - **By Last Name** - enter first few characters of last name and press **Enter**. Select them from the list by clicking the **Check In** button.
 - **By Member Id** - Enter *Member Id* and press **Enter**
 - **Scan In** - Either the front desk person or the member can scan their barcode

- **Guest Checkins**

- Type **guest** or **gg** in the text box and press **Enter**
- Fill out the form and click **Check In**

Guest Check In

Name:

Address:

City, State, Zip:

Phone:

Email:

Self Check-In

Another option for Facility check-ins is the **Self Check-In**. This is normally used when you **do not** have someone at the **front desk** and you want members to check themselves in by either manually entering their Member Id or scanning it with a **barcode reader/scanner**. You can also optionally allow people to check themselves in using their **last name** or as **guests**.

**** NOTE:** In order for a barcode to be successfully read by the scanner while in *Self Check-In* mode, RecDesk **must be** on the **Self Check-In** page **and** the cursor in the **input text box**.

Self Check-In Set Up

rec desk Oakridge Parks & Recreation

Dashboard Programs Memberships **Facilities** Members Leagues Registration Money Reports Admin

Facility List Reserve Facility Permitting Templates Add New Facility Attended Check In Self Check In

Today is Monday, March 25, 2013 Self Check In

Activity Center

Check-in Options

☐ Allow Guest Check-ins

☐ Allow Check-ins by Last Name search (default is by Member Id only)

Limit check-ins to Members with the following active Memberships

<input type="checkbox"/> Winter 2013 Pool Membership	<input type="checkbox"/> Fitness Center - Monthly
<input type="checkbox"/> Pool Membership 2013	<input type="checkbox"/> Youth Swim Lessons
<input type="checkbox"/> Rec Center Annual	<input type="checkbox"/> Outdoor Volleyball
<input type="checkbox"/> Fitness Center - Annual Membership	<input type="checkbox"/> Fitness Center - Mini Plan
<input type="checkbox"/> Pool Membership 2013B	<input type="checkbox"/> Summer 2013 Pool Membership

[Go to Self Check-in Page](#)

Basic Workflow

- Select a **Facility** from the drop down
- If would like to **limit check-ins** to Members with specific *active* Memberships, select the checkboxes for those Memberships
- Click on the Go to **Self-Check-in Page**. RecDesk will now enter **Self Check-in mode** and members of public will not be able to access the other administrative features of RecDesk. To exit this mode click **Exit Self Check-in** and enter your RecDesk password.

Activity Center

Check In

Enter (or scan) your Member ID

- **Member Self Check-in**
 - **By Last Name (if allowed)** - Member enters first few characters of last name and presses **Enter**. They select themselves from the list by clicking the **Check In** button.
 - **By Member Id** - Member enters their *Member Id* and presses **Enter**
 - **Scan In** - Member scans their barcode
- **Guest Checkins** - if allowed
 - Member clicks on **Check-In as Guest**
 - Member fills out the form and clicks **Check In**

Guest Check In

Name:

Address:

City, State, Zip:

Phone:

Email:

Appendix

<TODO>: Insert description text here... And don't forget to add keyword for this topic

Facility Fields

Facility Fields

General

- **ID** - Internal RecDesk Id assigned to Facility
- **Name** - Facility name
- **Facility Type** - The Facility Type assigned to this Facility. Facility Types allow you to organize facilities in a way that makes sense for your organization. See [Managing Custom Lists](#)
- **Primary Facility** - This simply means that it contains other facilities used by your organization. An example might be a Recreation Center with multiple classrooms and multi-purpose rooms. A facility designated as a *Primary Facility* can then be chosen as a *Parent Facility* when creating the separate entries for each of the classrooms/multi-purpose rooms. The advantage is that these newly created facilities inherit the Parent Facility's address and hours of operation attributes and do not have to be reentered. Additionally, when the address and hours of operation for a *Primary Facility* are updated, the updates are reflected in all other facilities that have designated that facility as a *Parent Facility*.
- **Parent Facility** - Choose a *Parent Facility* if this Facility is part of a larger Facility (Primary Facility). See *Primary Facility* above.

Address

- **Address Line 1** - Address of facility
- **Address Line 2** - Address of facility
- **City/Town** - City/Town where facility is located
- **State** - State where facility is located
- **Zip Code** - Zip code where facility is located

Accounting

- **Default GL Account** - The GL Account associated with fees collected for Facility Reservations. See [Managing Custom Lists](#)
- **Default GL Account - Deposit** - The GL Account associated with security deposits collected for Facility Reservations. See [Managing Custom Lists](#)

Other

- **Description** - Brief description of the facility
- **Note** - General notes about the facility
- **Capacity** - Facility's capacity. Informational only.
- **Show on Portal** - Check this box to make Facility appear on RecDesk Community portal. Default is checked.
- **Show Hours of Operation** - Check this box to make this Facility's *Hours of Operation* appear on the RecDesk Community portal. Default is checked.
- **Show Calendar on Portal** - Check this box to make this Facility's calendar appear on the RecDesk Community portal. Default is checked.
- **Permit Template** - The Permitting Template associated with Reservations made for this facility.

Hours of Operation

The days and hours that the facility is open.

Facility Reservation Fields

Facility Reservation Fields

General

- **Facility** - Facility to reserve
- **Use** - Brief description of purpose of reservation
- **Start Time** - Start date and time of reservation
- **End Time** - End date and time of reservation
- **All Day** checkbox - Check box to designate reservation as full-day
- **Repeat** checkbox - Designate reservation as repeating
 - Options are **Daily**, **Weekly** and **Monthly**
 - **Ends** by - options are after a specific number of *occurrences* or a *specific date*
- **Group Size** - Size of group (optional)
- **Description** - More detailed description of Use

Member Info and Fees (optional)

- **Member** - The Member who is making the Reservation.
- **Fee Required** checkbox - if there is a Fee associated with this reservation, select this check box
- **Fee Type** - Fee type for reservation
- **Fee Amount** - Fee associated with the reservation

- **Security Deposit** - optional security deposit amount

Members

The Member List

Members are the **people** in RecDesk. They consist of anyone that has a profile in RecDesk because they *registered for a Program, enrolled in a Membership, reserved a Facility* or had their profile added by a *family Member*. Members can be **solo** Members or organized into **Family/Group Accounts**. To Search for and work with Members click the Members tab. The default page will be the Member List.

You can Search for Members by: *Last Name, Phone Number, Town or Email Address*

Member List

rec desk

Oakridge Parks & Recreation UU

Dashboard

Programs

Memberships

Facilities

Members

Leagues

Registration

Money

Reports

Admin

Member List

Add New Member

Today is Tuesday, March 26, 2013

Member List

Search by: Last Name

Value: jo

Search

Add New Member

Export List to Excel

25 records per page

Search:

Name	Member Id	Street	City	Birthdate	
Johnson, Mike	2500001	123 Soapy Lane	Oakridge	1-1-1910	Register
Johnson, MMM	1234678	123 Soapy Lane	Oakridge	1-1-1900	Register
Johnson-Copy, Bill		123 Soapy Lane	Oakridge	1-1-1971	Register
Jones, Jack M	887766	12 Oak Street	Oakridge	1-1-1978	Register
Jones, Larry	102515	12 Oak Street	Oakridge	1-1-2004	Register

Showing 1 to 5 of 5 entries

← Previous

1

Next →

Master Calendar

Print Version

Quick Actions

Online Help

Shopping Cart

0 pending item(s)

RDAdmin

Creating and Modifying Members

Adding **new Members** and modifying existing ones begins on the [The Member List](#) page. To add a new Member, click on *Add New Member* from the Members submenu or the *Add New Member* Button. To **modify and existing Member**, simply click on it from the Members List page and click the *Edit* button. To add a new Family Member to an existing profile, see [Organizing as Family Groups](#).

For a complete list of Member related attributes see [Member Fields](#)

Basic Workflow

- Assign a **Member Id** (optional) - see [Assigning Member IDs](#) (***NOTE: If assigning a Member ID that is encoded in barcode format on a keyfob or ID card, it is best to scan the number in using a barcode scanner to avoid data entry errors*)
- Enter **First Name**, **Middle Initial** and **Last Name**
- Optionally check member as **Head of Household**
- Select **Gender** plus enter **Email Address**
- By default, the Member will receive emails. Uncheck **Receive Emails** to change this.
- Enter **Address Line 1**, **Address Line 2**, **City**, **State** and **Zip Code**
- Enter **Contact information**
- Optionally, enter **Emergency Contact information**
- Optionally enter a **Member Note**
- Click **Save**

Organizing as Family Groups

Members can be organized into **Family Groups** for convenience. To Add a new Family Member navigate to the profile you would like to add that individual onto and click the **Add New Group/Family Member** button. The advantage to organizing members as a **Family** are:

- After working with one Family Member, other Family Members appear in the subsequent drop downs to limit search time and ease data entry
- Makes searching for and viewing Member history for multiple family members very easy
- Specific members can be marked as *Head of Household* to ensure they receive email correspondence in addition to younger household members

Member Profile with Family Group

The screenshot displays the 'recdesk' software interface for 'Oakridge Parks & Recreation UU'. The top navigation bar includes tabs for Dashboard, Programs, Memberships, Facilities, Members (selected), Leagues, Registration, Money, Reports, and Admin. Below this, there are links for 'Member List' and 'Add New Member', and a date indicator 'Today is Tuesday, March 26, 2013'. The main content area is titled 'Member Detail' and shows the profile for 'Jack M Jones'. The profile includes tabs for 'Member Info', 'History', and 'Member Check-ins'. A section titled 'Group/Family Members' lists four members: Jack M Jones (1-1-1978), Larry Jones (1-1-2004), Bill O'My (1-1-2008), and Blah Blah (1-1-2008). Each member has a 'Select' button. A yellow button labeled 'Add New Group/Family Member' is located below the list. The 'Member Info' section shows 'Jack M Jones' with an 'Edit' button, 'Internal Id: 1', 'Member Id: 887766', and 'Relationship to Individual with -None Selected-'. The right sidebar contains links for 'Master Calendar', 'Print Version', 'Quick Actions', 'Online Help', 'Shopping Cart' (0 pending item(s)), and 'RDAdmin'.

Name	Birth Date	Action
Jack M Jones	1-1-1978	Select
Larry Jones	1-1-2004	Select
Bill O'My	1-1-2008	Select
Blah Blah	1-1-2008	Select

Member Info

Jack M Jones [Edit]

Internal Id: 1
Member Id: 887766
Relationship to Individual with -None Selected-

Assigning Member IDs

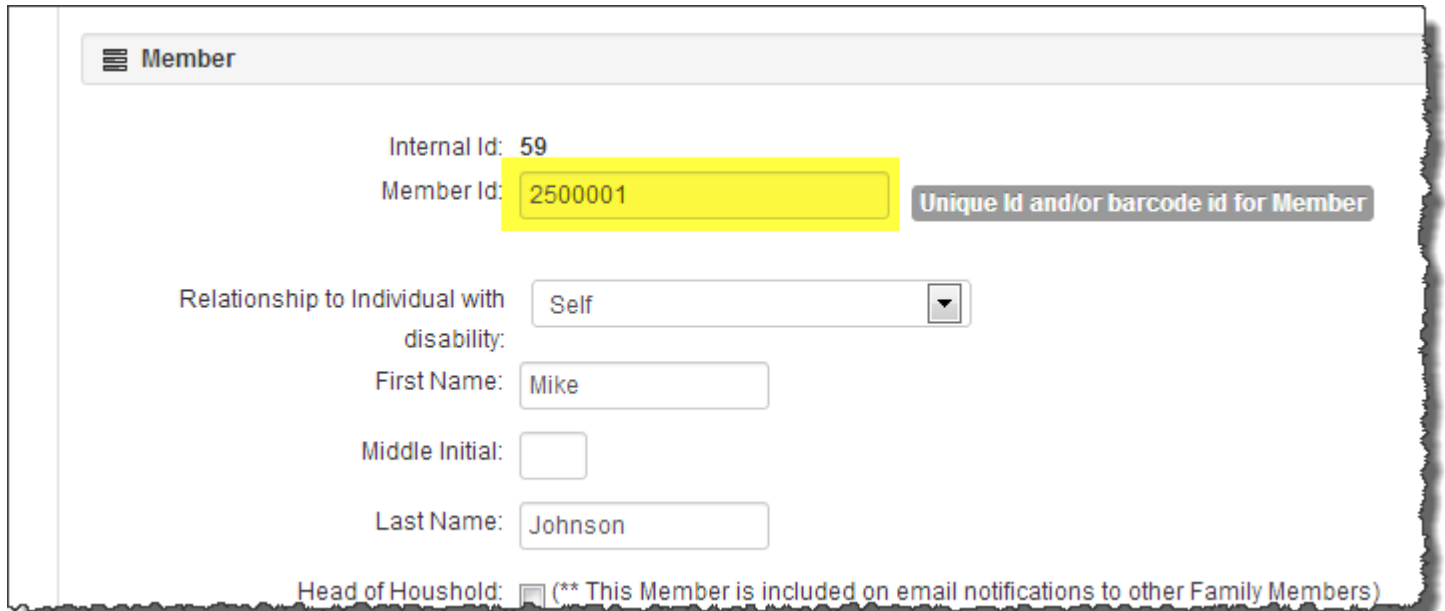
Members can be assigned a Member ID for purposes of uniquely identifying them to process things such as [Facility Check-ins](#). Most often this **unique Member ID** is encoded on *keyfob or ID card* in the form of a **barcode**. This makes it easy for them to scan or swipe a barcode as they enter a facility. But, it can also be used for manual entry as well without the use of a barcode. **Member IDs are optional**.

Member IDs can be assigned in 2 distinct ways

Automatically - We configure RecDesk to automatically assign a Member ID to an individual every time a new Member is created. It is recommended to start off with a **seed value** and then simply **increment by 1** every time a new Member is created. For instance, if the seed value was 1000, the first Member created in RecDesk would have a Member ID of 1001 and the next ones 1002, 1003 etc. In order to implement this, you tell us that you would like auto-assigned Member IDs and what your seed value should be (1000 is generally a good one) and we'll configure it that way.

Manually - You can also assign the Member IDs manually by editing the Members profile and typing in a Member ID (see [Creating and Modifying Members](#)). It must be **numeric** and no greater than **99999999**.

Member ID of Member Profile



The screenshot shows the 'Member' profile form in RecDesk. The 'Member ID' field is highlighted in yellow and contains the value '2500001'. To the right of this field is a grey button labeled 'Unique Id and/or barcode id for Member'. Below the Member ID field, there are fields for 'Relationship to Individual with disability' (set to 'Self'), 'First Name' (Mike), 'Middle Initial' (empty), and 'Last Name' (Johnson). At the bottom, there is a checkbox for 'Head of Household' with a note: '(** This Member is included on email notifications to other Family Members)'.

Member	
Internal Id: 59	
Member Id: 2500001	Unique Id and/or barcode id for Member
Relationship to Individual with disability:	Self
First Name:	Mike
Middle Initial:	
Last Name:	Johnson
Head of Household: <input type="checkbox"/> (** This Member is included on email notifications to other Family Members)	

Appendix

Member Fields

Member Fields

Member

- **Internal ID** - Internal RecDesk Id assigned to member
- **Member Id** - (optional) This is the *official* Member ID of this individual that is either auto-assigned by RecDesk or assigned by the organization. This would be the Id that is used for **Facility Check-ins** as well as what is encoded as barcode on a *membership id card* or *keyfob*.
- **First Name** - Member's first name
- **Middle Initial** - Member's middle initial
- **Last Name** - Member's last name
- **Head of Household** - Designates this member as the *head of household* and they will be included on any emailings/correspondence going out to their family members regarding Programs. More than one individual may be designated as head of household for this purpose.
- **Date of Birth** - Member's birthdate
- **Email Address** - Member's email address
- **Receive Emails** - Uncheck this to remove member from bulk email list

Address

- **Address Line 1** - Address of member
- **Address Line 2** - Address of member
- **City/Town** - City/Town

- **State** - State
- **Zip Code** - Zip code

Contact

- **Home Phone** - Member's home phone
- **Work Phone** - Member's work phone
- **Mobile Phone** - Member's mobile phone

Emergency Contact

- **Name** - Emergency contact name
- **Phone** - Emergency contact phone

Member Note

- **Note** - Miscellaneous notes about this member (medical etc). Notes made here will appear in the Detailed Roster so this is a good place to put information that needs to be communicated to Program administrators.

Login

- **User Name** - User name assigned to this user for the RecDesk Community portal (online registration)
- **Password** - Password assigned to this user for the RecDesk Community portal (online registration)

Money

Payment Search

You can Search for Payments in RecDesk by going to the Money tab and it will land on the Payment Search page by default. There are three distinct Search By modes:

- **Member Name** - Enter the first few characters of the payer's last name and hit Enter
- **Payment ID** - the internal RecDesk ID of the payment
- **All Payments in Partial Status** - this will list all Payments that are currently marked as Partial

Receive Payment

The **Receive Payment** option in RecDesk allows you to process and record payments in RecDesk that **are not in the context** of a *Program Registration, Facility Reservation or Membership Enrollment*. These may be incidental payments for things such as t-shirts, fund raising or similar.

Receive Payment Page

rec desk

Oakridge Parks & Recreation

DashboardProgramsMembershipsFacilitiesMembersLeaguesRegistrationMoneyReportsAdmin

Payment SearchReceive PaymentPayment Reconciliation

Today is Sunday, March 24, 2013Receive Payment

Payment Detail

Amount: 0.00

General Ledger Account: -None-

Go to GL Accounts

Member Making Payment: - Select Member -

SearchAdd New

Payment Method: - Select Payment Method -

Note:

Continue

Master Calendar

Print Version

Quick Actions

Shopping Cart

0 pending item(s)

RDAdmin

Payment Reconciliation

The **Payment Reconciliation** page gives you a quick and convenient way to view all payments for a particular time period. You can view this page by going to the *Money* tab and then clicking *Payment Reconciliation*. By default, it will show the current day's payments along with totals by payment type (Cash/Check/RecDesk Credit Card/Internal Credit Card)

Payment Reconciliation Page

rec desk

Oakridge Parks & Recreation

Dashboard

Programs

Memberships

Facilities

Members

Leagues

Registration

Money

Reports

Admin

Payment Search

Receive Payment

Payment Reconciliation

Today is Sunday, March 24, 2013

Payment Reconciliation

Type

Range

Begin Date

End Date

Search

-All-

Custom Dates

8/1/2005

11/1/2005

Q Search

Cash

Check

RecDesk Credit Card

Internal Credit Card

Refunds

\$51.00 (2 transactions)

\$72.00 (2 transactions)

\$0 (0 transactions)

\$0 (0 transactions)

(\$10.00) (1 transactions)

Quick Reports

- Select Report -

Master Calendar

Print Version

Quick Actions

Shopping Cart

0 pending item(s)

RAdmin

Payment ID	Date	Payee	City/Town	Type	Gross Amt	Net Amt
1	9/18/2005	Jack M Jones	Oakridge	Check	\$22.00	\$22.00
2	9/18/2005	Jack M Jones	Oakridge	Cash	\$29.00	\$29.00
3	9/18/2005	Alice Johnson	Oakridge	Cash	\$22.00	\$22.00
4	9/18/2005	Bill Johnson22	Oakridge	Check	\$50.00	\$50.00
4	9/26/2005	Bill Johnson22	Oakridge	Refund	(\$10.00)	(\$10.00)

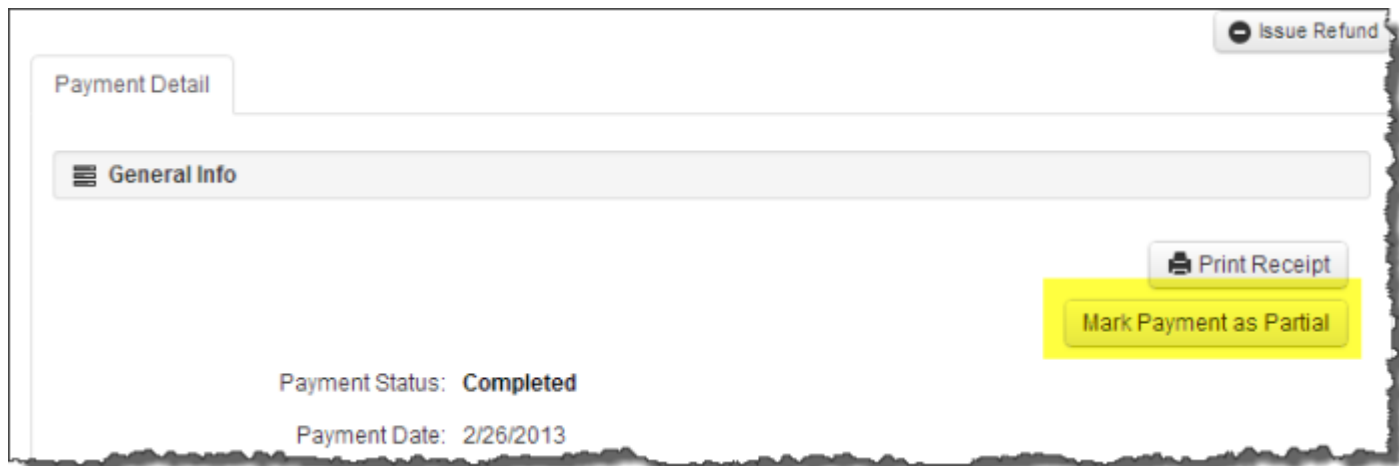
Partial Payments

Partial Payments allow you to defer all or a portion of a Payment for collection at a later date.

Marking Payment as Partial

There are basically two ways you can mark a payment as partial:

- By selecting the **Mark Payment as Partial** checkbox when the payment is initially being processed
- Or, after the fact, by navigating to the Payment Detail and clicking the **Mark Payment as Partial** button





Processing Partial Payments



Once a Payment is in partial status it can be processed by clicking **Apply Another Payment**. Conversely, it can be also be marked as complete by clicking **Mark Payment as Complete**. When *Apply Another Payment* is clicked, a page comes up that has all the individual items that were part of the original payment. At this point, new Payments can be applied to these individual items. When the Payment is processed, these amounts will be updated accordingly for the underlying registrations/reservations AND there will be a relationship defined between the original and new payment.

Apply Another Payment Page

Payments that are in Partial Status can be easily tracked and found in RecDesk. The first way is to navigate to [Paymer Search](#) and set the Search By drop down to **All Payments in Partial Status**. Also, any Reservations or Program Registrations that have a payment that is in partial status will be identified as such. An example of a [Program Roster](#) with a payment in partial status is shown below.

[Dashboard](#) [Programs](#) [Memberships](#) [Facilities](#) [Members](#) [Leagues](#) [Registration](#) [Money](#) [Reports](#) [Admin](#)[Program List](#) [Add New Program](#) Today is Saturday, March 23, 2013[View Roster](#) [Program Info](#) [Schedule](#) [Roster](#) [Wait List](#) [Attendance](#)**ADULT-008 - SPRING - Recreational Volleyball**[Edit](#)[Actions](#) [Export List to Excel](#)

	Name	Address	City	Birth Date			
1	Johnson, Alice	Partial Payment	123 Soapy Lane	Oakridge	1/1/1967	Payment	View  
2	Smith, Fred		12 Main Street	Oakridge	1/1/2000	Payment	View  

[Master Calendar](#)[Print Version](#)[Quick Actions](#) [Shopping Cart](#) 0 pending item(s)[RDAdmin](#) 

Refunds

Refunds can be issued by navigating to the **Payment** to be refunded via the [Payment Search](#) page or the View Payment links associated with *Program Registrations*, *Memberships* or *Facility Reservations*. Once you've navigated to the Payment Detail, click on the Issue Refund button to proceed (see below). You will then be able to issue refunds at the **line item** level for individual payment items.

Please Note: This records the Refund in RecDesk for reporting and reconciliation purposes but **does not** refund the actual credit card. This must be done through your Authorize.net, Stripe or PayPal administrative interface.

The screenshot shows the RecDesk interface for a payment detail. The top navigation bar includes links for Dashboard, Programs, Memberships, Facilities, Members, Leagues, Registration, Money, Reports, and Admin. Below this, there are links for Payment Search, Receive Payment, and Payment Reconciliation. The main content area is titled 'Payment Detail' and shows a 'General Info' section. The payment status is 'Completed', the date is '4/12/2013', and the ID is '290'. A yellow 'Issue Refund' button is visible in the top right corner of the main area. On the right sidebar, there are links for Master Calendar, Print Version, Quick Actions, Online Help, Shopping Cart (0 pending items), and a user dropdown for RDAdmin.

rec desk Oakridge Parks & Recreation UI

Dashboard Programs Memberships Facilities Members Leagues Registration Money Reports Admin

Payment Search Receive Payment Payment Reconciliation

Today is Friday, April 12, 2013 Payment List

Payment Detail

General Info

Issue Refund

Print Receipt

Mark Payment as Partial

Payment Status: **Completed**

Payment Date: 4/12/2013

Payment ID: 290

Master Calendar

Print Version

Quick Actions

Online Help

Shopping Cart

0 pending item(s)

RDAdmin

Reports

Program Related

[Program Report - Detailed](#)

[Roster - Simple](#)

[Roster - Detailed](#)

[Attendance Sheet](#)

[Programs Brochure - Extract](#)

A simple report that extracts all relevant information on Programs and schedules that can then be exported to PDF, Excel or Word and form the basis for a ***print*** catalog of Programs.

Facility Related

[Single Facility Usage Report](#)

[Multi Facility Usage Report](#)

Money Related

Revenue By Period - Summary

Revenue By Period - Detail

Revenue By Program

Refunds By Period

Payments and Registrations Related

Payment Detail By Period

General Ledger Related

[Revenue By Period - Summary](#)

[Revenue By Period - Detail](#)

Member Related

Email List

Admin

Adding RecDesk Users

You can add as many Users as you'd like to RecDesk Director. Here's how:

1. Click on the *Admin* tab
2. Select **RecDesk User List** from the sub menu
3. Click **Add New User**

Managing Custom Lists

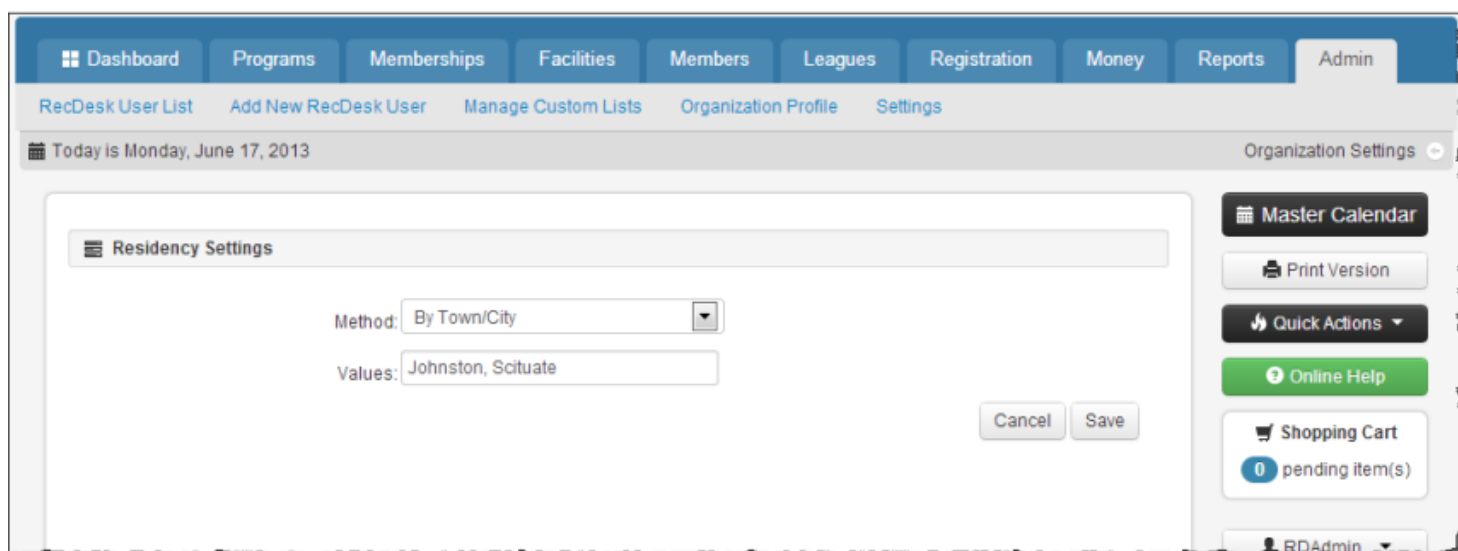
RecDesk allows you to maintain your own custom categories and lists to help you organize your data in a way that makes sense for your organization. These lists can be viewed and modified by navigating to the *Admin* tab and selecting *Managing Custom Lists*.

- **Program Types** - Program Types allow you to categorize your Programs to fit your organization's unique offerings. These can then be assigned to Programs either when adding or editing them. The Program List page (in both Director and the RecDesk Community portal) can then be filtered by this value. Some examples might be: *Youth Programs*, *Adult Programs* and *Summer Camps*
- **Program Subtypes** - A further way to categorize Programs
- **Facility Types** - Facility Types allow you to categorize your Facilities. These can then be assigned to Facilities either when adding or editing them. The Facility List page (in both Director and the RecDesk Community portal) can then be filtered by this value. Some examples might be: *Ballfield* or *Classroom*
- **Facility Subtypes** - A further way to categorize Facilities
- **Fee Types** - Fee Types are the general labels used to describe *what* a Fee is. These are then assigned to specific Programs (along with a *value*), Membership Types and Facility Reservation schedules. Some examples would be: *Resident*, *Non-resident* or *Scholarship*.
- **General Ledger Codes** - Programs, Membership Types and Facilities (for purposes of Reservations) can be assigned a General Ledger code for Reporting and Accounting purposes. This allows for consistent tie-in with your town/organization's larger finance and accounting framework.

Setting Up Residency Requirements

RecDesk allows you to set up residency parameters based on **Town/City** or **Zip Code** to automatically classify Members as Residents or Nonresidents. Select the **Method** (*Town/City or Zip Code*) and then enter the desired values separated by commas. The example below shows two towns separated by commas. Upon clicking **Save**, the Residency Setting will be applied to ALL individuals with profiles in RecDesk.

The Residency Setting is totally optional and if there is none set, profiles have a default Residency Status of **Not Set**. If you would like to unset (go back) to this setting after you've already applied a residency scheme, simply clear all entries in the Values text box and hit **Save**. This will revert all profiles back to a *Not Set* status.



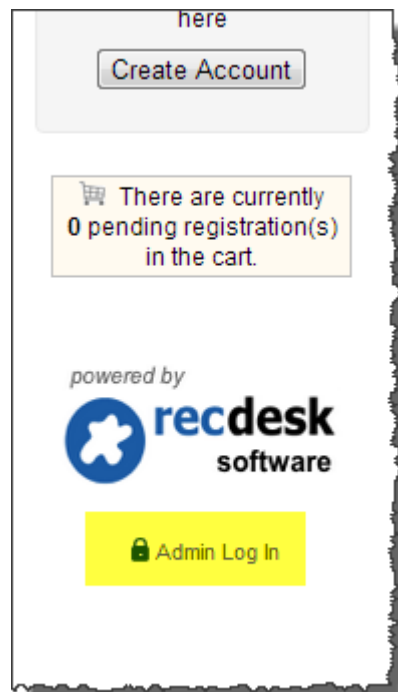
The screenshot shows the RecDesk web application interface. At the top is a navigation bar with tabs: Dashboard, Programs, Memberships, Facilities, Members, Leagues, Registration, Money, Reports, and Admin. Below this is a sub-navigation bar with links: RecDesk User List, Add New RecDesk User, Manage Custom Lists, Organization Profile, and Settings. A status bar indicates 'Today is Monday, June 17, 2013' and 'Organization Settings'. The main content area is titled 'Residency Settings' and contains a form with two fields: 'Method' (a dropdown menu set to 'By Town/City') and 'Values' (a text box containing 'Johnston, Scituate'). 'Cancel' and 'Save' buttons are at the bottom right of the form. A right-hand sidebar contains several utility buttons: Master Calendar, Print Version, Quick Actions, Online Help, Shopping Cart (showing 0 pending items), and a user profile dropdown for 'RDAdmin'.

RecDesk Community Portal

Your **RecDesk Community portal** is what the public sees and where they go to see what Programs are being offered and to *register online*. This is in contrast to **RecDesk Director** which is the administrative part of RecDesk that only recreation staff see and work in. The **RecDesk Community** portal also serves as place to share **announcements**, **documents** and other information related to your organization. All Program and Facilities you enter into RecDesk Director are immediately available on the RecDesk Community portal.

Logging In

You may log in to your **RecDesk Community** portal to [Add or Update Content](#) or [Upload Documents](#). You will have been assigned a separate User ID and Password for this purpose. Sign in by clicking the **Admin Log In** link in the lower right-hand pane. See below. Once logged in, you will be able to add and edit content as required.

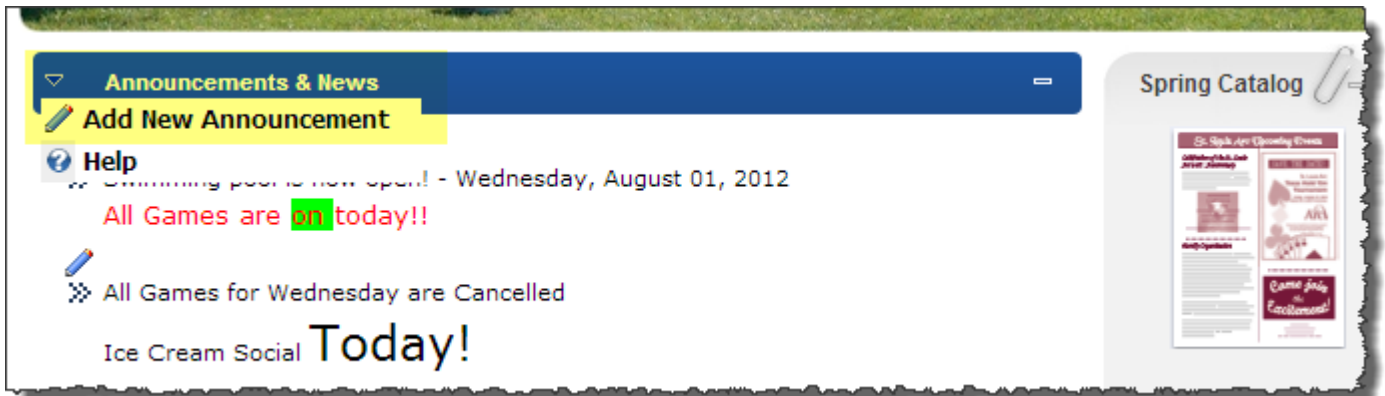


Adding and Updating Content

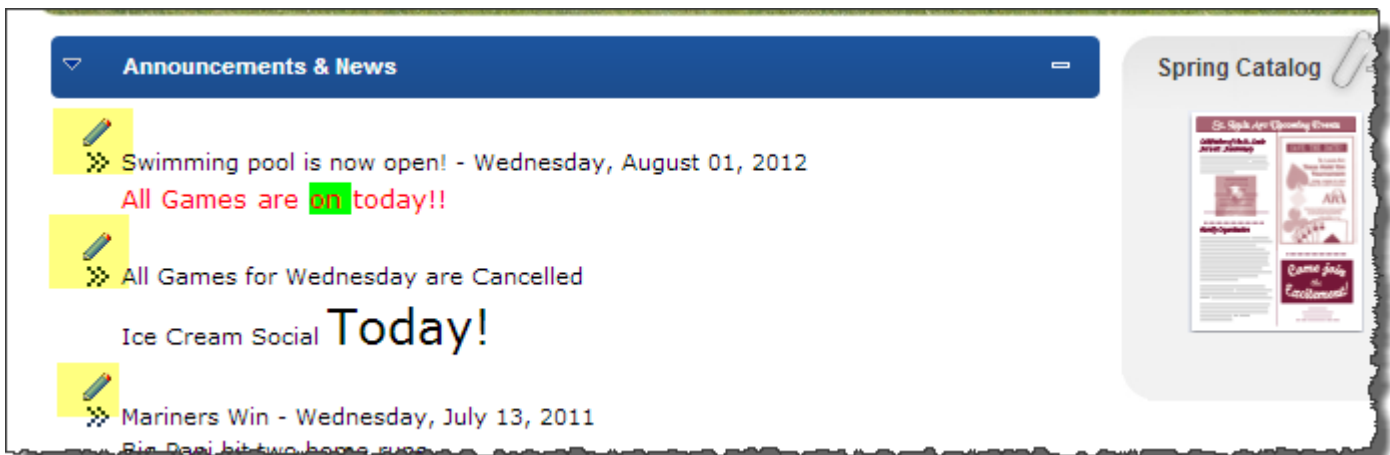
Announcements

[Log in to your Community portal](#) and go to the Home page.

Adding an Announcement - Click on down arrow and then Add New Announcement








Update an Announcement - Click on the blue pencil icon next to announcement to update



This will bring up the text editor. Add/update the Title, create the content and then click **Update** at the bottom.

Policies & Procedures

 Edit Text Import Content Export Content Syndicate Help Print

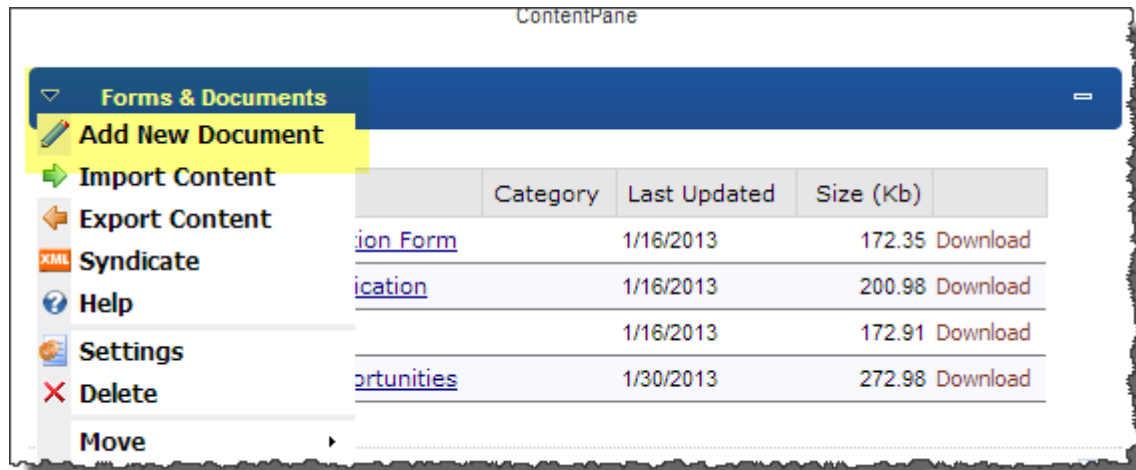
fees will be given for any registrations cancelled by the participant two
class/practice minus an administrative fee of \$10. If the program/class is
community Center, a full refund of participation fees will be given. Partial
r programs/classes that participants are unable to complete due to illness

Uploading Documents

RecDesk gives you the ability to **upload documents** to your RecDesk Community portal on any page you'd like via the **documents widget**.

Adding New Documents

1. [Log in to your Community portal](#) and go to the page with the **documents widget** on it
2. Click on the down arrow in the header and select **Add New Document**



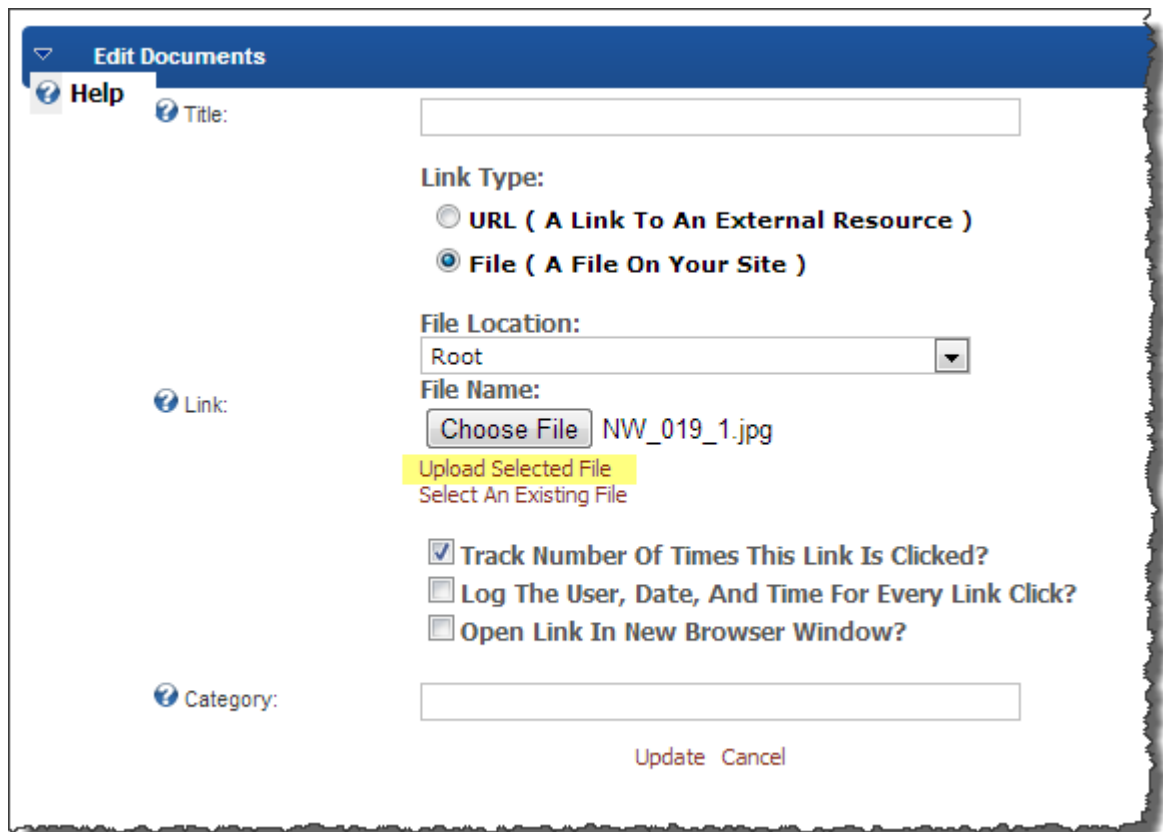
3. Give it a **Title** and click **Upload New File**

The screenshot shows the 'Edit Documents' form. It has a blue header with a dropdown arrow and the text 'Edit Documents'. The form contains several fields and options:

- Title:** A text input field, highlighted in yellow.
- Link Type:** Two radio button options: 'URL (A Link To An External Resource)' and 'File (A File On Your Site)'. The 'File' option is selected.
- File Location:** A dropdown menu with 'Root' selected.
- File Name:** A text input field with 'altoakridge.jpg' entered, highlighted in yellow.
- Upload New File:** A button, highlighted in yellow.
- Track Number Of Times This Link Is Clicked?:** A checked checkbox.
- Log The User, Date, And Time For Every Link Click?:** An unchecked checkbox.
- Open Link In New Browser Window?:** An unchecked checkbox.
- Category:** A text input field.
- Update Cancel:** Two buttons at the bottom right.

4. Click **Choose File** and select the file from your hard-drive

5. Click **Upload Selected File**



The screenshot shows the 'Edit Documents' form. The 'Title' field is empty. Under 'Link Type', the 'File (A File On Your Site)' radio button is selected. The 'File Location' dropdown is set to 'Root'. The 'File Name' field contains 'NW_019_1.jpg'. The 'Upload Selected File' button is highlighted in yellow. Below it, the text 'Select An Existing File' is visible. The 'Track Number Of Times This Link Is Clicked?' checkbox is checked. The 'Log The User, Date, And Time For Every Link Click?' and 'Open Link In New Browser Window?' checkboxes are unchecked. The 'Category' field is empty. At the bottom, 'Update' and 'Cancel' buttons are present.

Edit Documents

Help ? Title:

Link Type:

☐ URL (A Link To An External Resource)

☒ File (A File On Your Site)

File Location:

Root

File Name:

NW_019_1.jpg

Upload Selected File

Select An Existing File

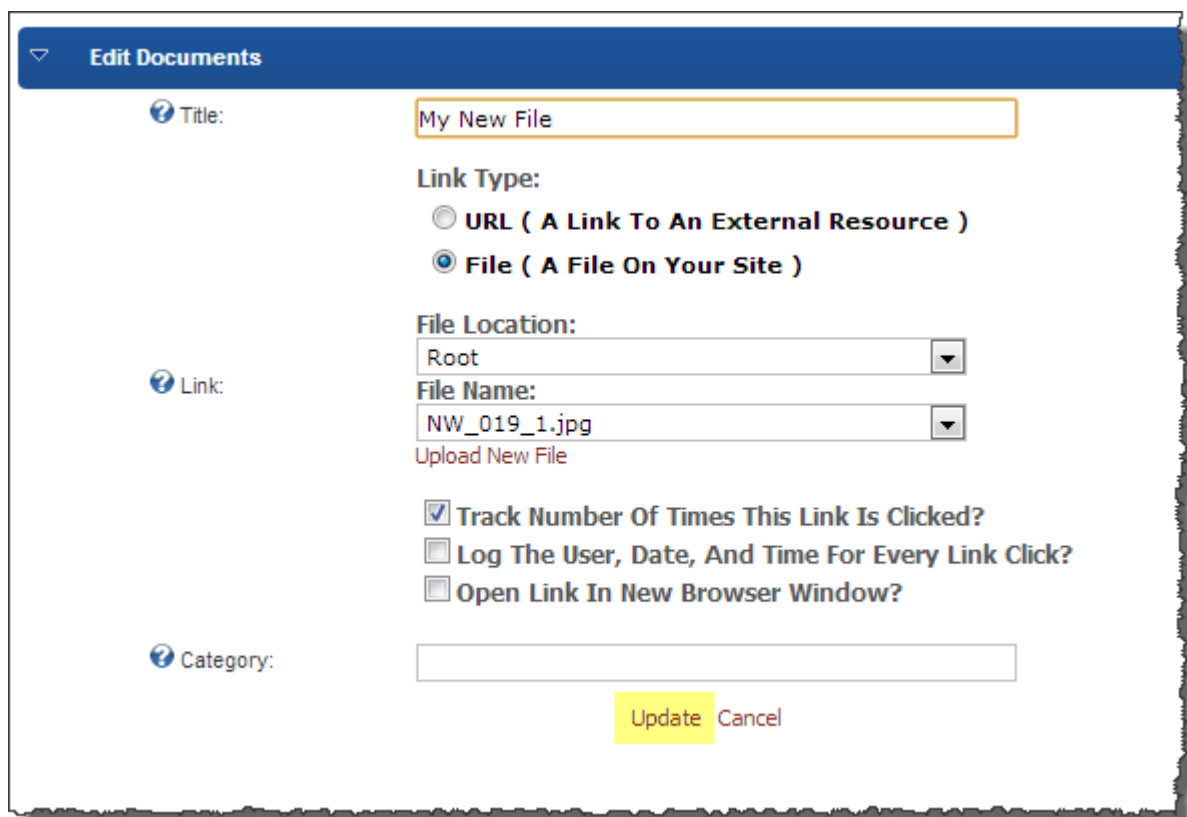
☒ Track Number Of Times This Link Is Clicked?

☐ Log The User, Date, And Time For Every Link Click?

☐ Open Link In New Browser Window?

Category:

6. Click **Update**...and that's it.



The screenshot shows the 'Edit Documents' form after the file has been uploaded. The 'Title' field now contains 'My New File'. The 'File Name' dropdown is set to 'NW_019_1.jpg'. The 'Upload New File' text is visible. The 'Update' button is highlighted in yellow.

Edit Documents

? Title:

Link Type:

☐ URL (A Link To An External Resource)

☒ File (A File On Your Site)

File Location:

Root

File Name:

NW_019_1.jpg

Upload New File

☒ Track Number Of Times This Link Is Clicked?








☐ Log The User, Date, And Time For Every Link Click?

☐ Open Link In New Browser Window?

Category:

Updating Documents

1. [Log in to your Community portal](#) and go to the page with the **documents widget** on it
2. Click on the pencil icon to the left of the document you would like to update

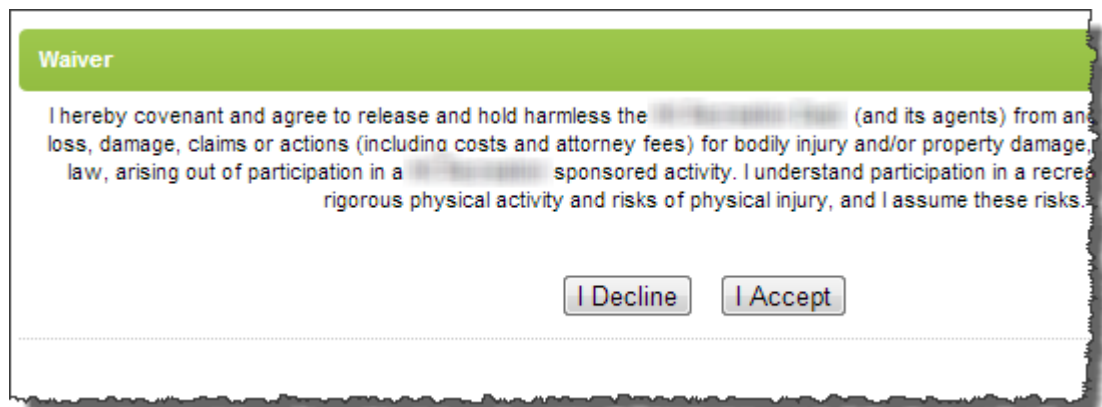
Forms & Documents					
	Title	Category	Last Updated	Size (Kb)	
	Fitness Facts	Parks & Rec	2/20/2006	0.02	Download
	Fridays Doc		8/26/2011	96.29	Download
	Random File		8/11/2011	96.29	Download
	Senior Center - Fall Activities	Senior Center	2/20/2006	0.02	Download
	Summer Programs	Parks & Rec	2/20/2006	0.02	Download
	Test doc		8/2/2012	152.67	Download
	Waiver	Parks & Rec	2/20/2006	0.02	Download
** Easily upload any forms or documents that you would like to make available for download **					

3. Follow the steps start at #3 above as to how to update and save the document

How Waivers Work

As part of the RecDesk Community portal check out process, online registrants must (*at your Organization's discretion*) **Accept** a *Waiver* prior to RecDesk allowing final payment. You provide the initial verbiage and are then able to maintain and change it moving forward. The basic workflow for online registration is as follows:

1. User adds registrations to their **shopping cart**
2. They click on the **Check Out** button
3. Your **Waiver** verbiage is displayed (see below)
4. If they **Accept**, they continue on to the Payment page. If they **Decline**, they are redirected back to the shopping cart



Waiver

I hereby covenant and agree to release and hold harmless the [redacted] (and its agents) from any loss, damage, claims or actions (including costs and attorney fees) for bodily injury and/or property damage, law, arising out of participation in a [redacted] sponsored activity. I understand participation in a recreational rigorous physical activity and risks of physical injury, and I assume these risks.