

Getting the Most out of Hytek Team Manager for BCSSA Registrars

Contents

- Introduction 2
- Part I – Setting up Hytek 2
 - Know where your database is..... 2
 - Create a new folder for your new database: 2
 - Make a Copy of your current database 3
 - Save the copy 3
 - Set the Back-Up/Restore and other directories for your new database 4
 - Set the Age-Up Date 5
 - Setting Up BCSSA Standard Groups 6
 - Why do it this way?..... 6
 - Building the Groups 7
 - Groups and Subgroups..... 9
 - Athlete Custom Fields 10
 - Print Registration Forms 11
 - Reset All the Athlete Data..... 12
- Part II – Registering Swimmers 15
 - For Summer Registration: 15
 - For Winter Registration: 17
- Reporting..... 18
 - Generating Data in Excel..... 21
- Conclusion..... 22
- Appendix 1 – Registrars Timeline..... 23
 - Important Dates for Club Registrars 23
- Appendix 2 - Exporting Rosters..... 24
 - To Generate the Export File: 24
 - To Generate the Roster Report in PDF Format:..... 25

Introduction

Hytek Team Manager can be a great tool for managing club data. It's also used by regional registrars and the provincial office to track membership. Standardizing select features among all BCSSA users will streamline roster submissions between clubs and regional/provincial registrars, and allow easy identification of payment amounts for BCSSA fees. Standardizing has another benefit of "spreading the knowledge"; if everyone is doing things the same way there will always be help and answers available.

This proposal covers standardizing the following for **all Clubs, Regional Registrars & Provincial Registrars**:

- Creating a new database for each swim season. A season covers the period from May 1st to April 30th, and includes summer and winter maintenance
- Standardizing the use of the group filters Team, School Year, WM Group and WM Subgroup so that everyone used the same designations.

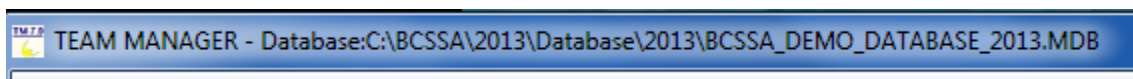
At the club level, there are configurations that can be beneficial. These are **club optional** but can help with keeping track of data within the club. Having people properly grouped allows for easy creation of contact lists, rosters & tax receipts.

- Use the "Group" filter to track 'level' or 'fee level' i.e. Senior, Intermediate, Junior, Guppies
- Use the "Subgroup" filter to track swimmers coach
- Use the custom fields to record fees paid for each session of the season – summer, winter1, winter2 etc.

Part I – Setting up Hytek

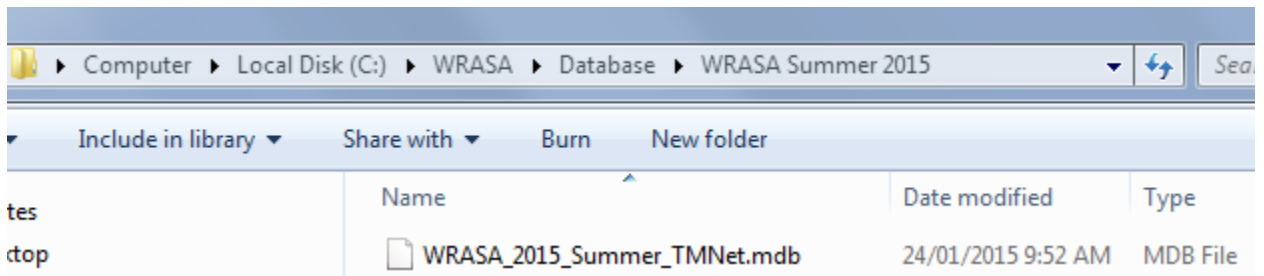
To create a new database for a new season:

Know where your database is. To Locate the database .MDB file, The file path is always right at the top of your Team Manager Window



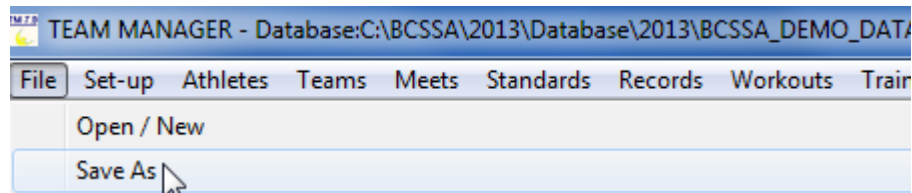
Create a new folder for your new database:

Use Windows explorer to create a folder system that will let you keep databases, reports, etc. separate from year to year. Don't use spaces in your database name. Suggest something like:



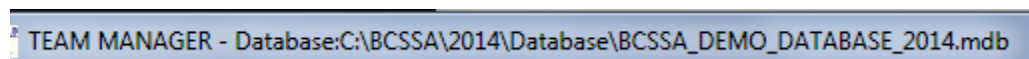
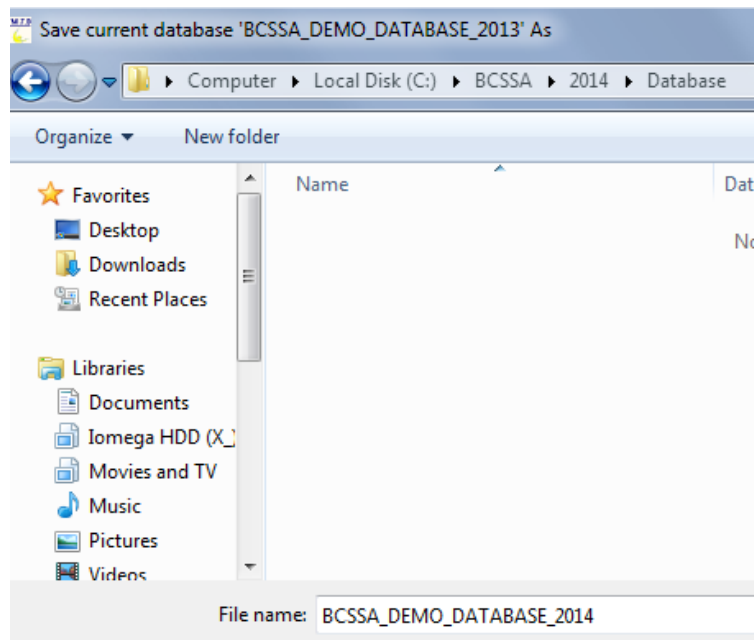
Make a Copy of your current database

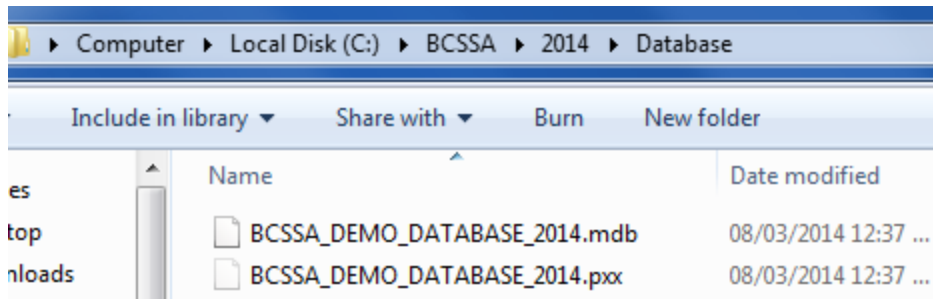
“ File > Save As” Command.



Save the copy

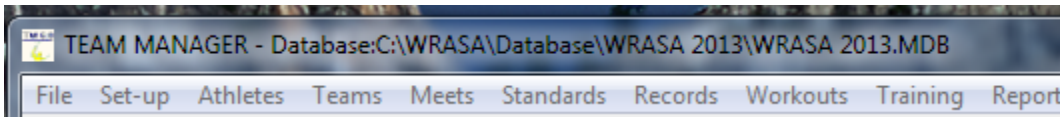
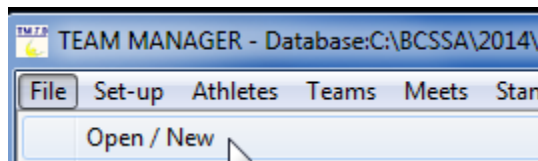
to your new file location and rename it to the new year



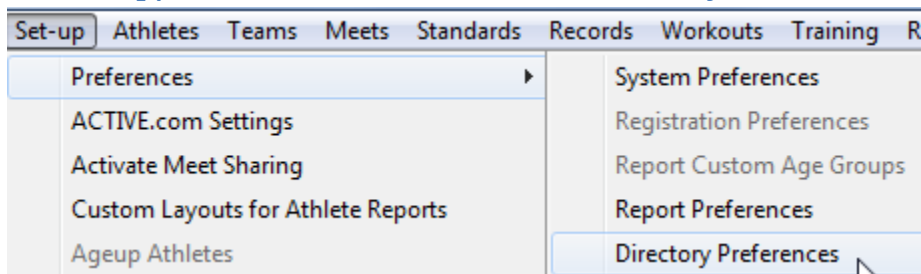


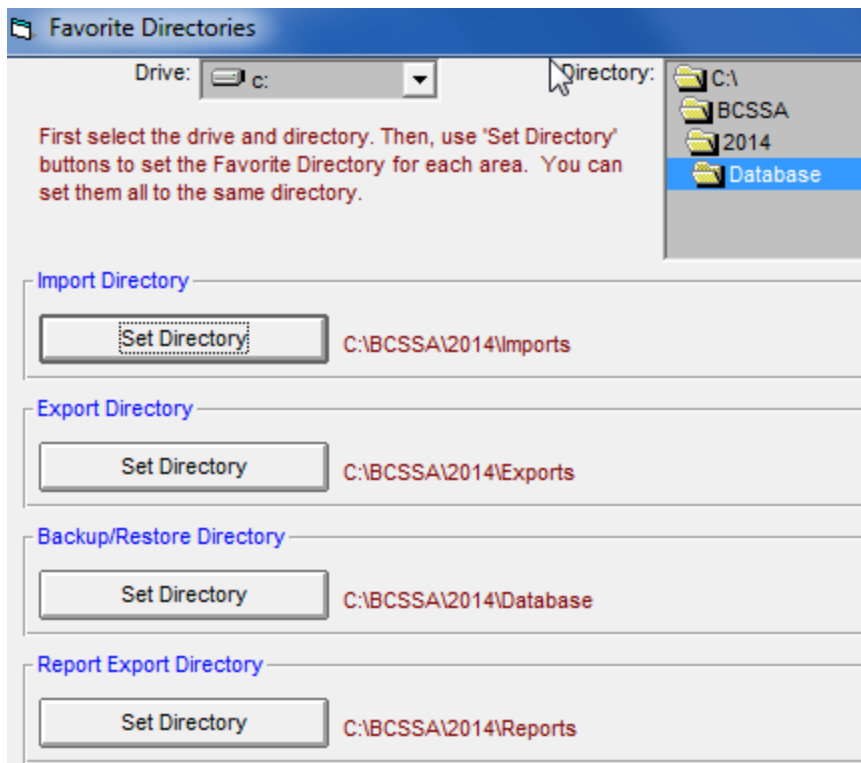
Note: if you forget to rename it during the save, no worries. Just shut down TM, find the file in the NEW location, right-click on it and rename there. Then start up TM and use the File> Open to open this copy of the database.

1. **If not already open, open Team Manager** and navigate to and open your new database:



Set the Back-Up/Restore and other directories for your new database



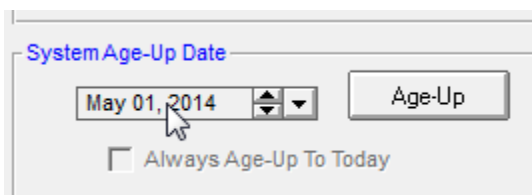
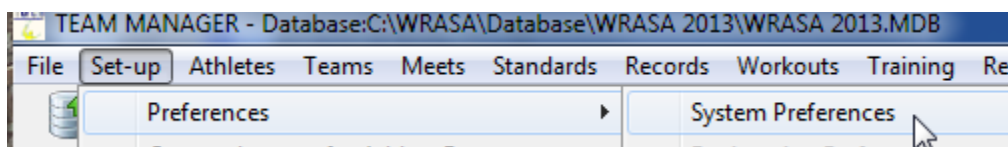


Tip: You may also want to set up the other directories on this screen.

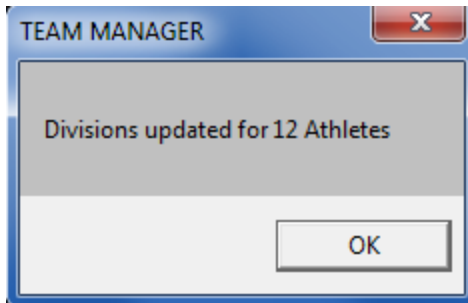
Set the Age-Up Date

Age up the athletes under “Setup > Preferences> System Preferences”

Be sure to use the date in the “System Age-Up Date” Box. The meet age-up date will automatically be set when the system age-up date changes.



And hit the Age-Up button.



Setting Up BCSSA Standard Groups

BCSSA is asking all clubs to identify

- Summer Swimmers using the “School Year” group “SU”. *** updated June 20, 2015. Hytek has advised that “School Year” can only use 2 characters.*
- All Winter Swimmers using the “WM Group” “WIN”
 - Summer swimmers also registering for a winter program with the WM Subgroup “RET”
 - Swimmers joining a winter maintenance session, who did not swim summer will use the WM Subgroup “NEW”

Why do it this way?

Because now we can easily organize and track swimmers by summer and winter sessions, and easily identify what BCSSA fees are owed by a swimmer.

To show all the Summer Swimmers in the athlete menu or in reports, use the School Yr “SU” filter.

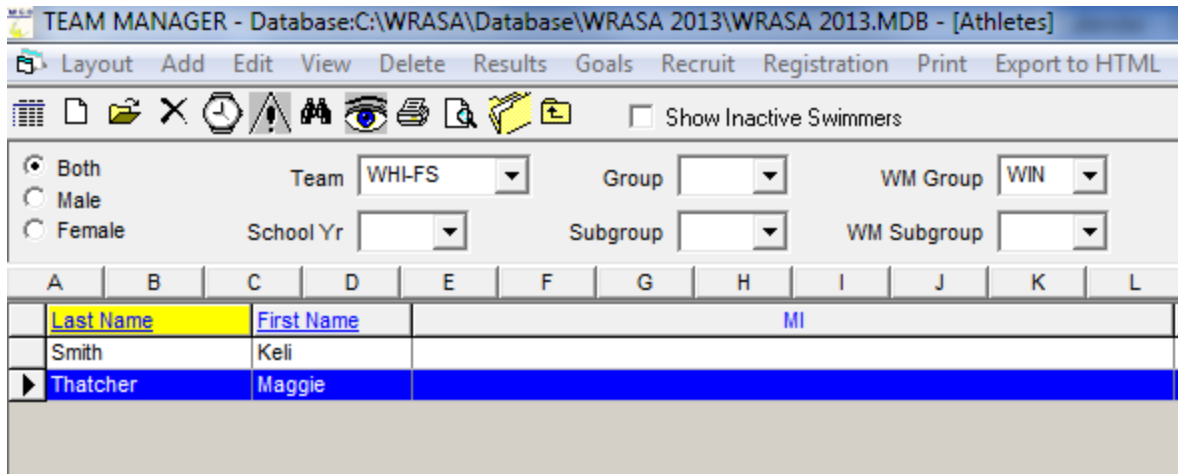
Show Only Inactive Swimmers

Both Team: WHI-FS Group: WM Gr:
 Male School Yr: SU Subgroup: WM Subgr:
 Female

	B	C	D	E	F	G	H	I	J	K	L	M	N
	Last Name	First Name	MI	Gen	Bir	Reg	Gr	Gr Joined	Sub	Yr			
▶	Ang	Matthew	E	M	-08		GT		GT	SU			

This is all the summer swimmers BCSSA will be expecting a fee for.

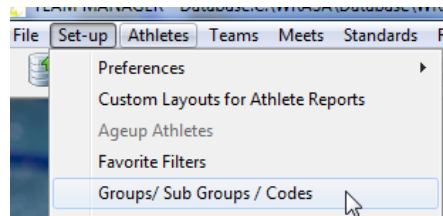
To show all the Winter Swimmers: Use the WM Group “WIN” filter



Within the winter maintenance group, show all the swimmers who joined for the winter: use the WM Subgroup “NEW” filter

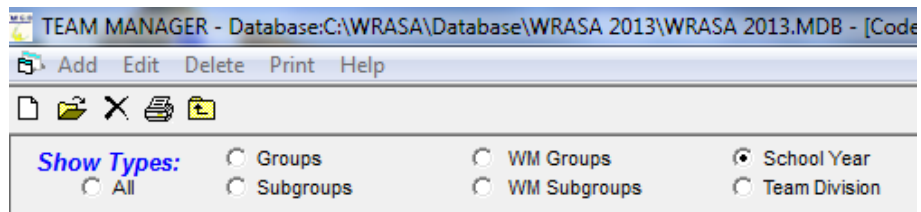
******* Tip*******

To remove all swimmers from a group, delete the group name, then recreate it. This is the quickest way to reset the groups so that swimmers can be re-assigned for the new season and ensure there are no ‘leftovers’ from the previous season

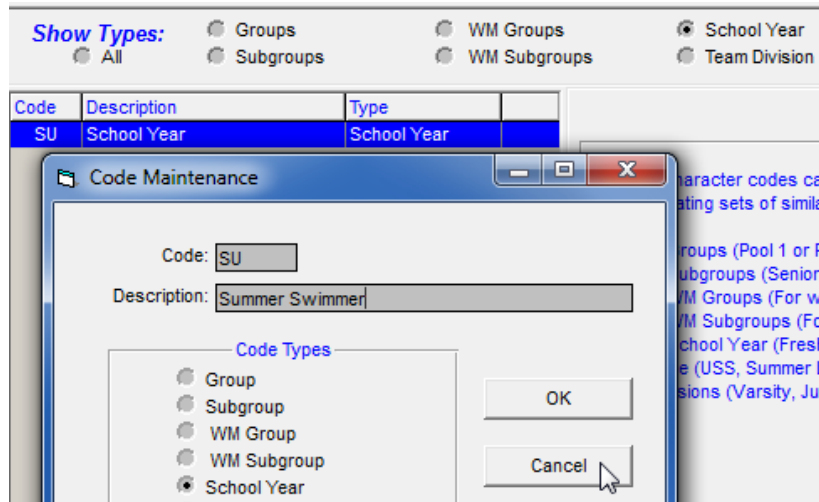


Building the Groups

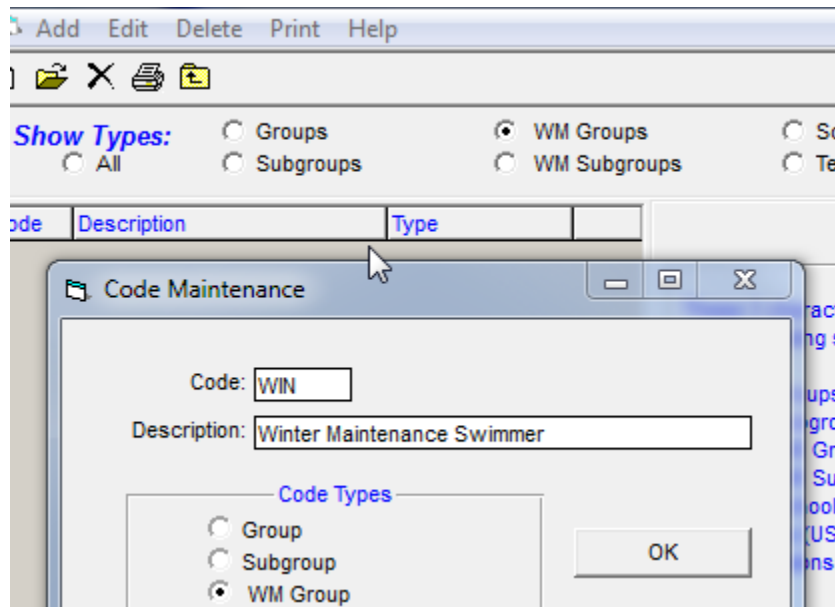
- a. We’ll use ‘School Year’ to identify swimmers for the summer season



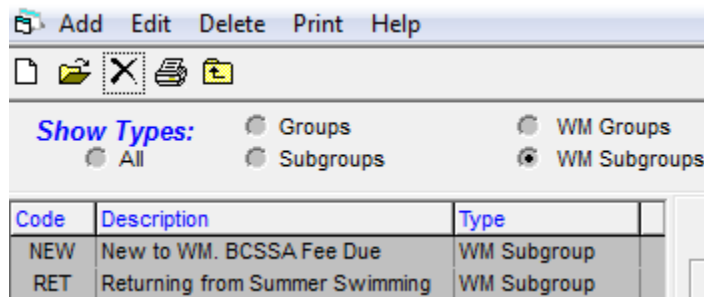
- b. If it’s not already there, create (add) a school-year group called ‘SU’. If it is there, delete it and recreate it. This will remove the group designation from all swimmers so that the field is blank for your new season.



- c. Similarly, create a group (or delete and re-create) to identify Winter Maintenance Swimmers using the WM Groups

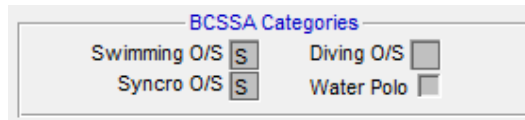


- d. We'll use WM Subgroups to identify who is a WM swimmer who is brand new – and therefore needs to pay a BCSSA fee – and WM swimmers *returning* from the summer season – these swimmers don't have to pay the BCSSA fee again for this year.



Groups and Subgroups

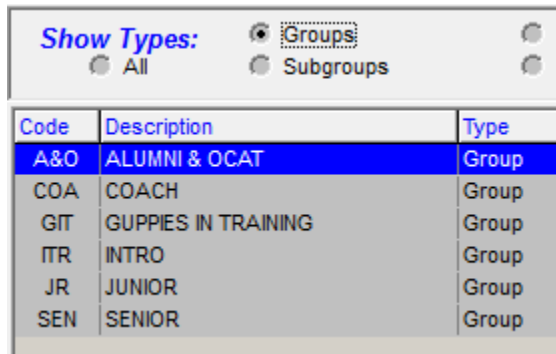
Groups and Subgroups are then left for the club to use as they like. This is a sample what we've used in our club. Remember that in addition to groups, you will also have BCSSA Categories as a way to group athletes. These are mandatory for use in clubs with multiple aquatic sports.



BCSSA Categories

Swimming O/S	<input checked="" type="checkbox"/>	Diving O/S	<input type="checkbox"/>
Syncro O/S	<input checked="" type="checkbox"/>	Water Polo	<input type="checkbox"/>

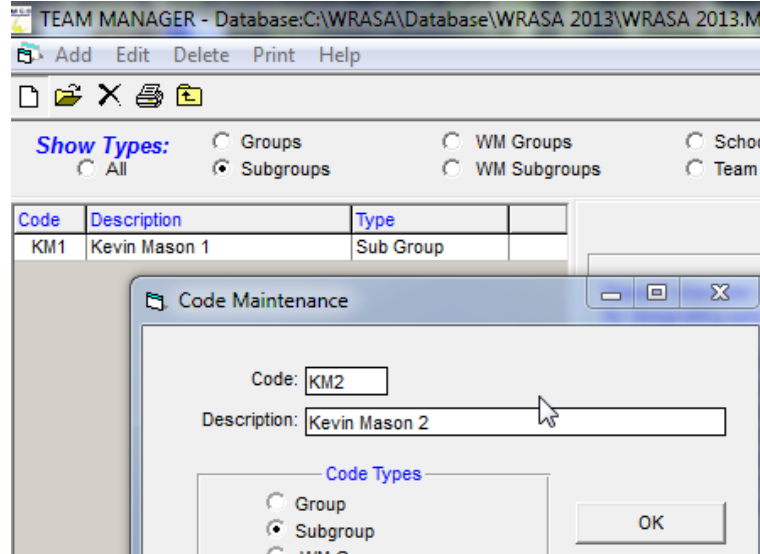
In our Club, 'Groups' are setup according to the clubs fee structure. You can set up as many groups as you have fee levels.



Show Types: Groups Subgroups All Subgroups

Code	Description	Type
A&O	ALUMNI & OCAT	Group
COA	COACH	Group
GIT	GUPPIES IN TRAINING	Group
ITR	INTRO	Group
JR	JUNIOR	Group
SEN	SENIOR	Group

'Sub-Groups' are set up by coaching groups. (This can be done after registration and training groups are set. Great job for coaches to do themselves). Create a group for each training group, even if a coach has more than one group.



TEAM MANAGER - Database:C:\WRASA\Database\WRASA 2013\WRASA 2013.M

Add Edit Delete Print Help

Show Types: Groups WM Groups School All Subgroups WM Subgroups Team I

Code	Description	Type
KM1	Kevin Mason 1	Sub Group

Code Maintenance

Code: KM2

Description: Kevin Mason 2

Code Types

Group Subgroup WM Group

OK

TEAM MANAGER - Database:C:\WRASA\Database\WRASA

Add Edit Delete Print Help

Show Types: Groups WM Groups
 All Subgroups WM Subgrc

Code	Description	Type
KM1	Kevin Mason 1	Sub Group
KM2	Kevin Mason 2	Sub Group
SS1	Shelby Slater 1	Sub Group
KIR	Kirsten	Sub Group

Athlete Custom Fields

Athlete Custom Fields are optional. Our club uses these fields to track fees paid by session, which can then be extracted to create tax receipts. We also track forms received, and sometimes t-shirt size.

***** Note *****

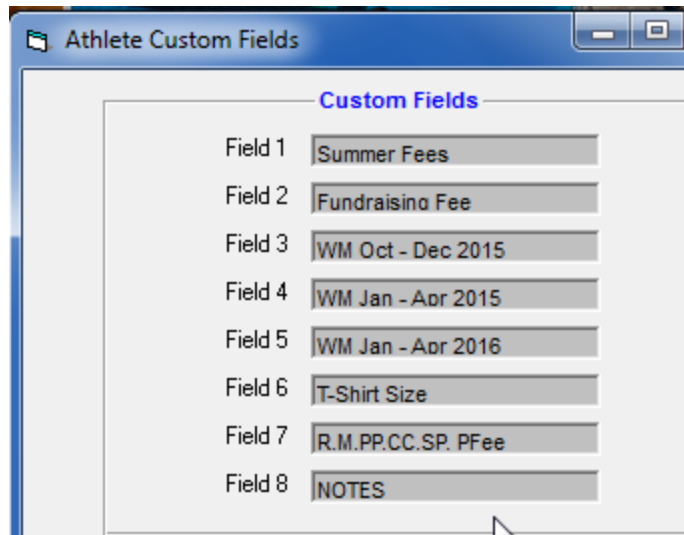
Care Card Number is considered private information and should not be recorded.

Custom Fields are found in the Athlete Menu, under the 'Custom' tab.

Primary Contact | Secondary Contact | Medical | Custom

Custom Field Names	Custom Field Values
Summer Fees	<input type="text"/>
Fundraising Fee	<input type="text"/>
WM Oct - Dec 2015	<input type="text"/>
WM Jan - Apr 2015	<input type="text"/>
WM Jan - Apr 2016	<input type="text"/>
T-Shirt Size	<input type="text"/>
R,M,PP,CC,SP, PFee	<input type="text"/>
NOTES	<input type="text"/>

Go into the custom field setup and, Removing Care Card Number if it's there; rename or label a field for each fee a swimmer pays. Additionally, you may want a field to keep track of registration forms received.



Note: data is **not** removed from swimmers when a field is re-named. This will be done in a later step.

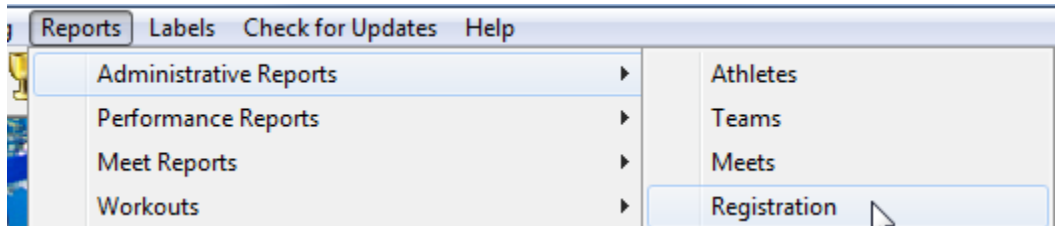
Print Registration Forms

2. At this point, we're ready to reset all athlete data.

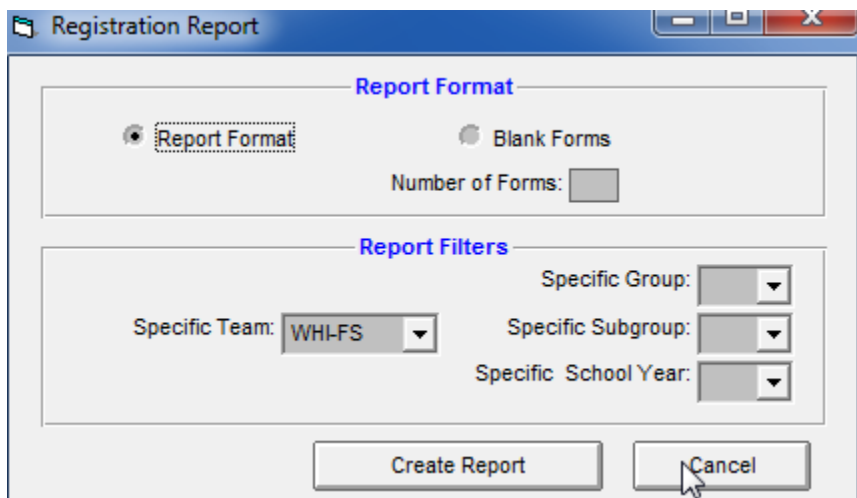
But before you do, you may like to be able to print registration forms for each athlete that was active the previous season. The majority of BCSSA swimmers will return for the upcoming season, so now is the time to run the report and save it. It can be printed anytime needed.

Once the Athlete data is reset, you won't be able to get this report easily. So do this first:

a. To get the registration report for all active athletes, go to:



b.



c. Produces a registration form with the correct year in the header

BCSSA Athlete Registration 2015			
Club Initials: WHI	Region: Fraser South	BCSSA Number: FSWHI03024	
Athlete Information: Please Print Clearly			
Last Name: Ruim	First Name: Daniel	Preferred Name: <small>(if different than first name)</small>	Gender: M

d.

Why do this? Our experience has shown that it is far easier and saves tons of time to have people look over a pre-filled in form and highlight the changes, than it is to have everyone fill out a new blank form each year. Handwritten forms are notoriously difficult to read, especially for email addresses 😊.

Save the report, and you'll have it for when you need the printed forms at registration time.

Reset All the Athlete Data

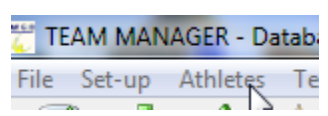
Regional and Provincial Registrars – can purge all athletes, since they will be getting import files from each club.

Club Registrars – don't want to purge athletes because all the name, address, contact info would have to be keyed in each year. Instead, go through each athlete and 'reset' everything. Depending on the size of your club, this can take a bit of time.

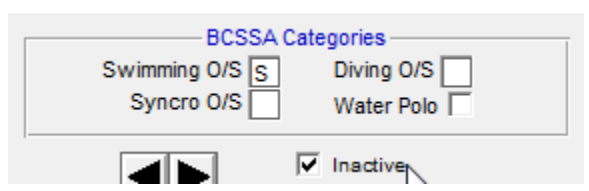
Resetting athlete data is important for a few reasons

- We don't want any group info to carry over from year to year. All athletes start a new year not belonging to any group
- Similarly, we don't want any custom information carrying over from year to year with the exception of fees that may be needed for tax receipts
- Each season starts with all athletes inactive. Only when fees are collected and registration forms signed, are they switched to an active status.

To reset athlete data, go to each active swimmer on the athlete menu



- Make them inactive – (they get turned to active when fees are paid)



- Set all groups/subgroups/WM Groups/WM Subgroups/School YR to <blank>. See the tip in step 8 for a shortcut.

Group: Joined:

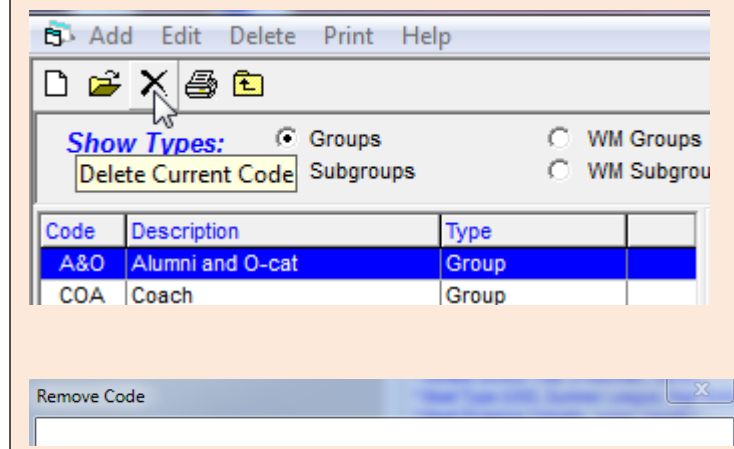
Subgroup:

WM Group:

WM Subgr:

School Yr:

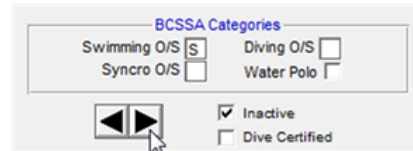
Tip: to remove a filter from all swimmers at once, delete the group. This doesn't delete the swimmer, just takes away their group (or subgroup) designation. This is very useful in 'resetting' all swimmers which is covered later on.



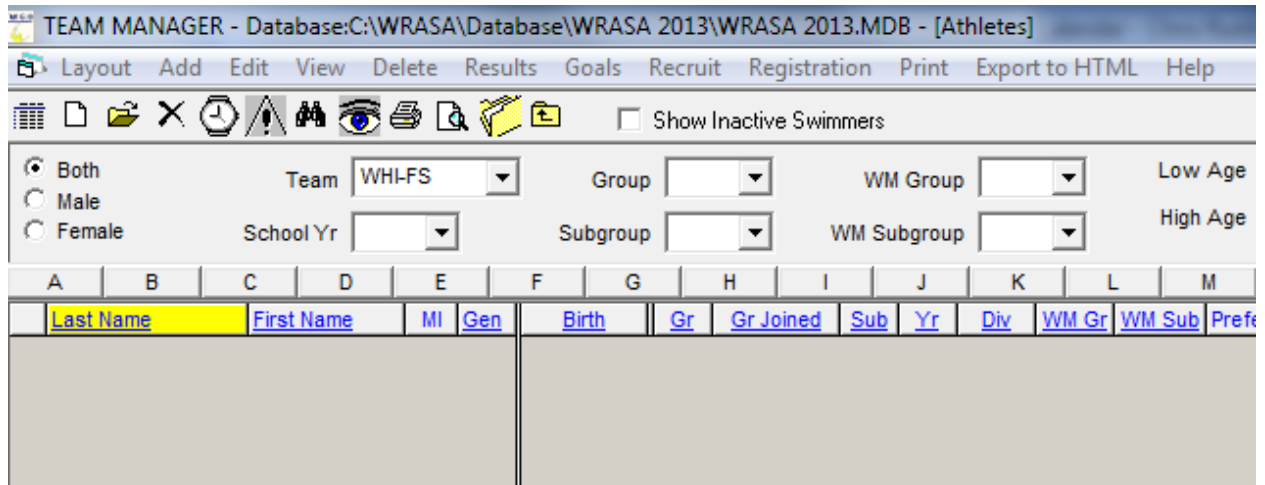
- Remove all custom info except 2015 Winter Maintenance fees for Jan – Oct if that was one of you fields. You will need this information for 2015 tax receipts.

Custom Field Names	Custom Field Values
Summer Fees	<input type="text"/>
Fundraising Fee	<input type="text"/>
WM Oct - Dec 2015	<input type="text"/>
WM Jan - Apr 2015	200
WM Jan - Apr 2016	<input type="text"/>
T-Shirt Size	<input type="text"/>
R,M,PP,CC,SP, PFee	<input type="text"/>
NOTES	<input type="text"/>

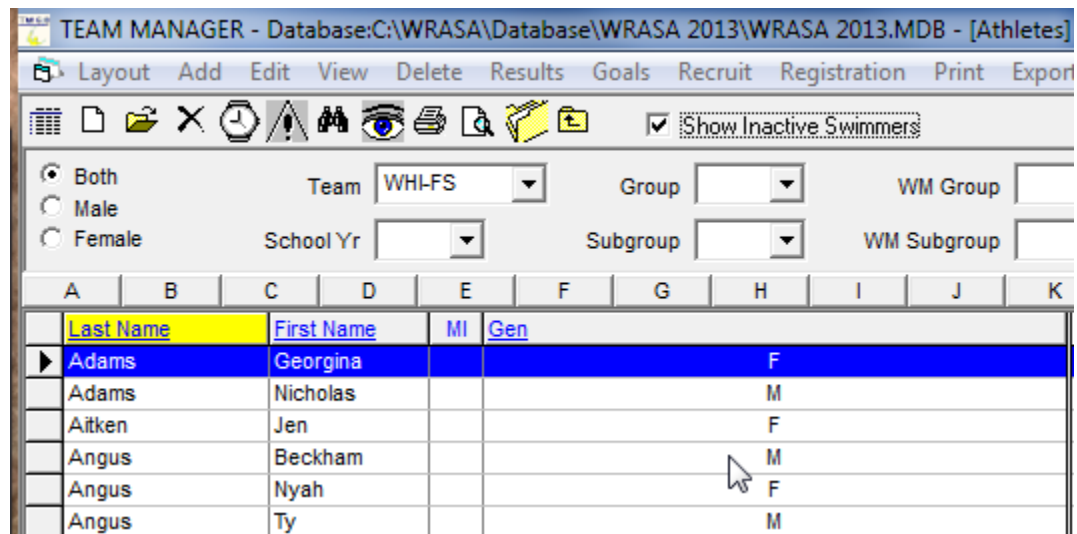
Tip: On the Athlete Information Screen, the dark black forward and back arrows in the bottom right area move you to the next or previous athlete:



When complete your Athlete Menu should show no-one



Until you select the "Show Inactive Swimmers" checkbox which shows all the athletes in your database:

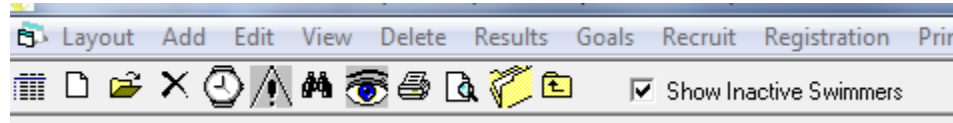


That's it!! You're ready to register swimmers for the new season!

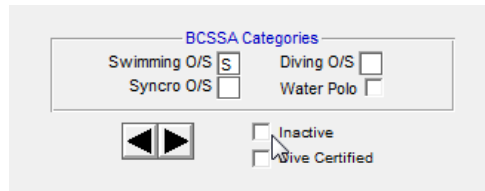
Part II – Registering Swimmers

For Summer Registration:

1. Collect your forms and payments. No Changes here unless you're using Online Registration – which is another topic altogether. BCSSA requires a registration form for each swimmer. Your club may have other forms required.
2. To enter a swimmer into Hytek
 - a. Turn on the “Show Inactive Swimmers” checkbox on the Athlete Menu



- i. If the swimmer has been with your club before, he should be in your database. Just find him/her. If the swimmer is new, Key in all the information from the registration form.
 - i. **Activate** them by un-checking the 'inactive' box
 - ii. **Assign the BCSSA Categories.** Choose the appropriate categories for all sports the athlete will be competing in. It is good practice to assign everyone an 'O' (for O-Cat) or 'S' (for 'Summer') in the Swimming Category, even if they are not planning at the registration time to swim.



- i. **Assign** the group filters denoting a summer swimmer



In this case the swimmer paid for 'Senior' fees, is in the “National Blue” Training Schedule group, and is a Summer Swimmer.

- ii. **Record** the Custom information – Fees and forms collected

- iii. Verify and update all the contact information for the swimmer. Our club uses the 'Athlete E-mail' field as the only email field when creating email lists.

- iv. Click OK and you're done with this swimmer. Just to check, uncheck the 'Show Inactive Swimmers' button and you should now see your swimmer you just entered:

<input checked="" type="radio"/> Both <input type="radio"/> Male <input type="radio"/> Female		Team	Group	WM Group											
		School Yr	Subgroup	WM Subgroup											
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Last Name	First Name	MI	Gen	Bi	Req	Gr	Gr	Sub	Yr	Div	WM Gr	WM Sub		
	Smith	Kelly		F	00	K	A&O		INT	SU	Div 5				

3. For Swimmers new to your club, the steps are basically the same, but you will have to Add a swimmer and enter all the data, rather than just 're-activating' an existing swimmer and updating their info.

For Winter Registration:

The process is much the same.

1. If the swimmer has been with the club in the summer, he/she will already be active.
 - a. You just need to assign to the winter groups

Member of

Team 1: WHL-FS [v] Joine

Team 2: [v]

Team 3: [v]

Group: A&O [v] Joine

Subgroup: INT [v]

WM Group: WIN [v]

WM Subgr: RET [v]

School Yr: SU [v]

- b. And record the fees paid for the winter session on the custom fields

Primary Contact	Secondary Contact	Medical	Custom	Em
Custom Field Names		Custom Field Values		
Care Card Number			9856-941-893	
Summer Fee			400	
Winter Sess 1 Fee			125	
Winter Sess 2 Fee			125	
Fundraising Fee			75	
Volunteer Cheque			150	
Reg and Consent Form			y,y	
Notes				

- c. If you get a swimmer in Winter Maintenance who did not swim in the summer, first check the inactive swimmers to see if they are already in your database. If they are,
 - i. activate them,
 - ii. record their winter maintenance groups,
 - iii. record their winter maintenance fees paid.

Record them as a 'NEW' Winter Maintenance swimmer since they will be required to pay the winter BCSSA fee.

Athlete Information

Last Name: Thatcher First Name: Maggie Middle:
 Preferred Name: Birthdate: 01/30/1999 Swim: Div 5
 Build ID: ID #: FSWHI06012 Athlete Cell:
 Gender (M,F): F Athlete E-Mail: ironlady@gb.com

Use Sibling Information: Ashley 842 Parker St

Primary Mailing Information

Father's Last: Thomas Father's First: Michael
 Mother's Last: Thomas Mother's First:
 Mailing Address: 8425 LARKER St
 Mailing Address:
 City: Surrey Province: BC
 Postal Code: V4x 4R5 Country: CAN

Swap Mother/Father Names, Tele, E-mail: Fill in 'Mail To' if different from first names and last name
 Mail to:

Member of

Team 1: WHI-FS Joined: MM/DD/YY
 Team 2:
 Team 3:
 Group: Joined: MM/DD/YY
 Subgroup:
 WM Group: WIN
 WM Subgr: NEW
 School Yr:

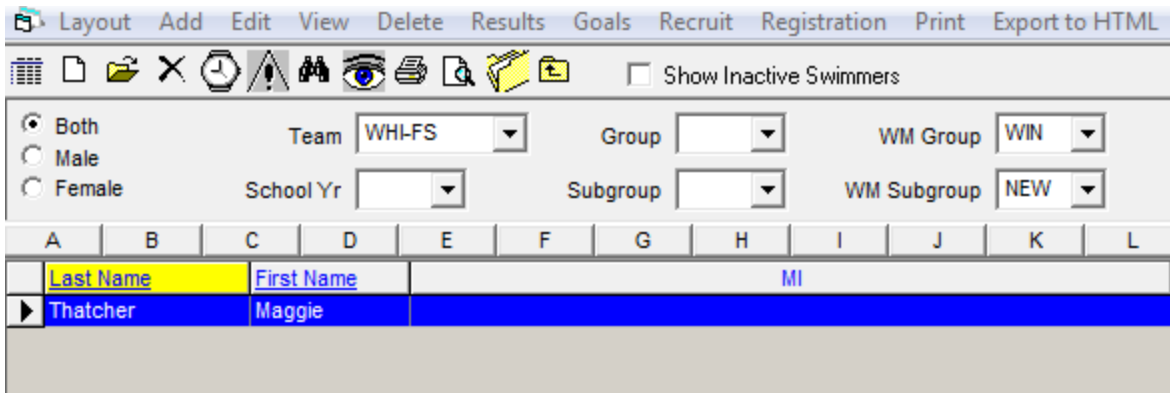
Custom Field Values

Custom Field Names	Custom Field Values
Care Card Number	9863 525 863
Summer Fee	<input type="text"/>
Winter Sess 1 Fee	125
Winter Sess 2 Fee	125
Fundraising Fee	<input type="text"/>
Volunteer Cheque	<input type="text"/>
Reg and Consent Form	y,n
Notes	<input type="text"/>

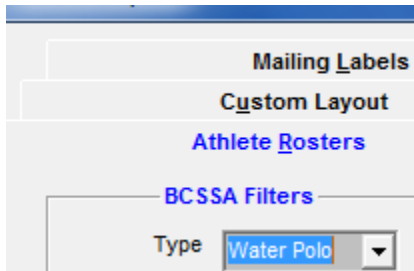
- d. If you have a swimmer brand new to the club for winter maintenance, you will need to enter all the data. The grouping assignment would be “NEW” the same as the step above.

Reporting

By using the School Yr, WM Group, WM Subgroup, and BCSSA Categories you have many options for extracting data. For example, these are the people BCSSA will be expecting a WM registration fee for.



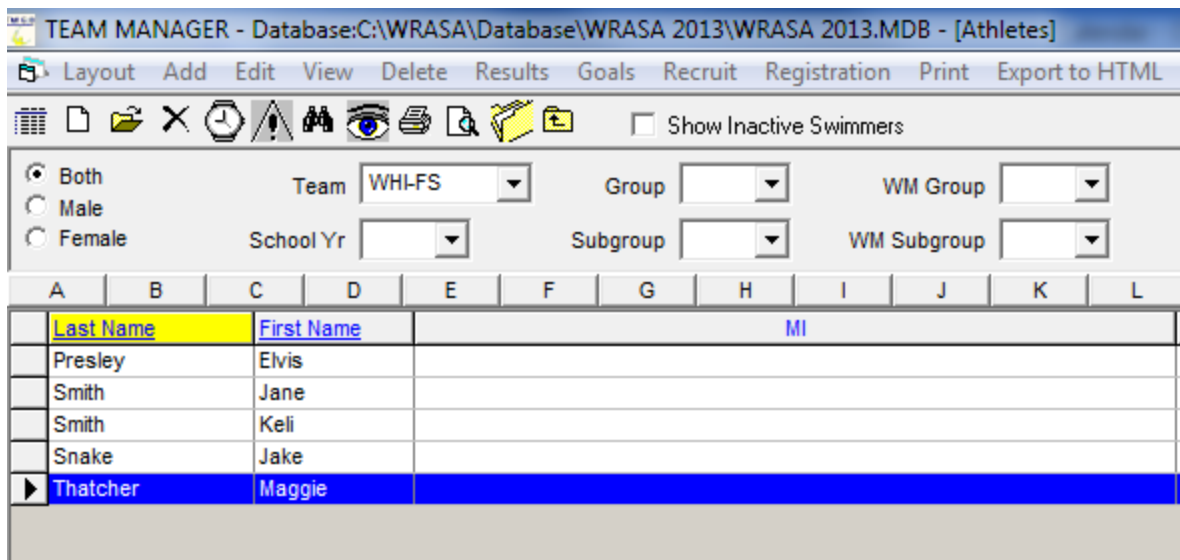
When creating an athlete roster, this would show you all the water polo players:



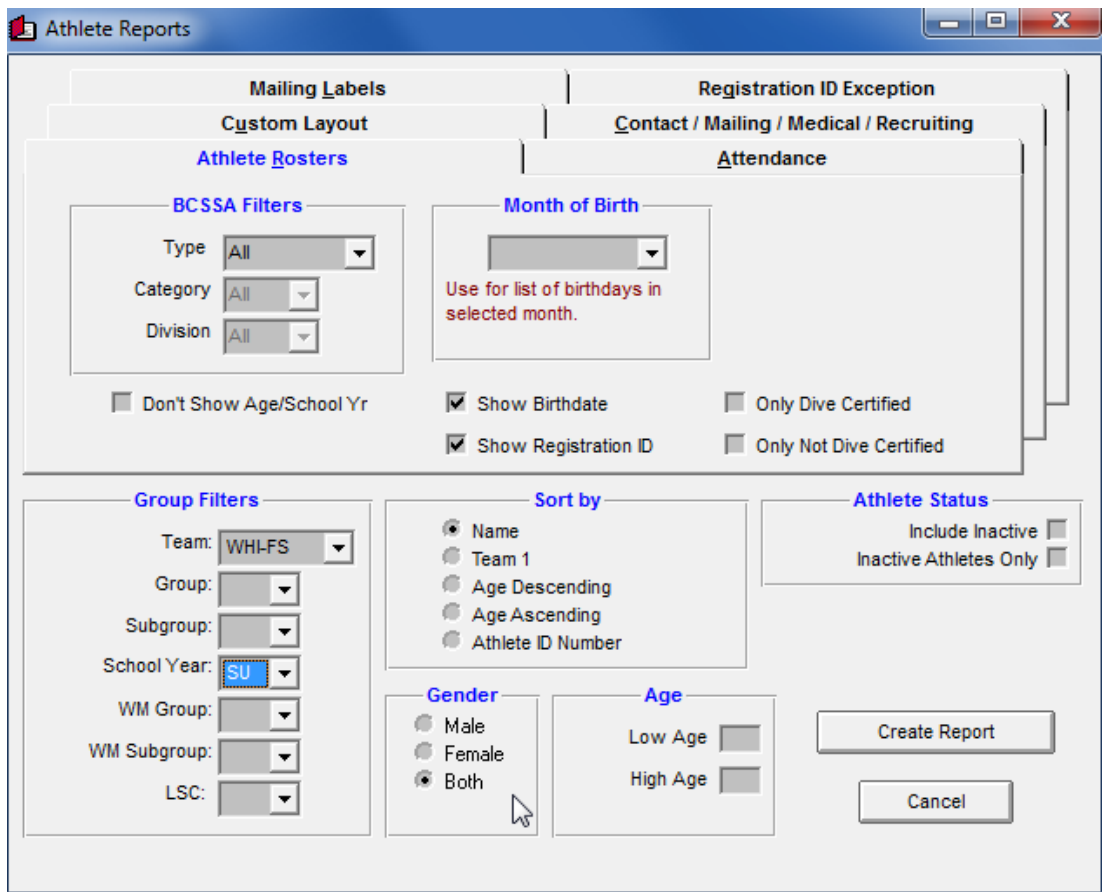
Athlete Roster Water Polo Only

Name	Gender	Birthdate	ID#	Group	Team	Swim	Dive	Syncro	WPolo
Ash Ketchum	M	02/02/1997	ZZBC-13002	SR1/P3	BC	Div 7	-	-	Cat 4
Bartholomew Simpson	M	08/08/2000	BCSSA13004	INT/P3	BC	Div 5	-	-	Cat 3
SpongeBob Squarepants	M	03/03/2003	BCSSA13008	/P1	BC	-	-	-	Cat 1
Sylvester Thecat	M	05/05/1999	BCSSA13003	/P5	BC	-	-	-	Cat 3

Another example: Show all the swimmers for the entire season starting May 1; just leave all filters blank

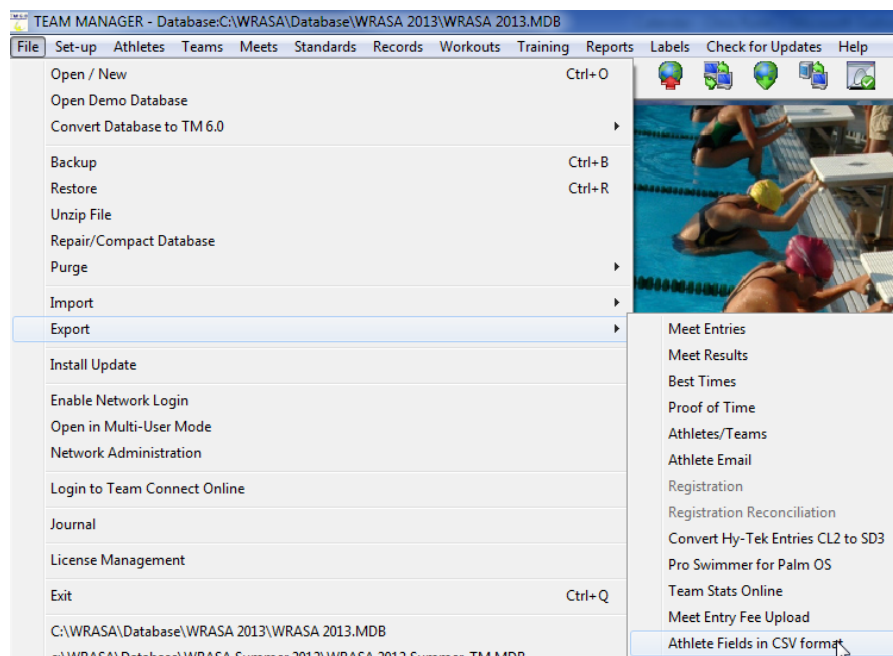


These filters can be used when creating reports, or exporting data. The Groups and Subgroups are also very useful when creating email lists, or seasonal results for coaches by group, since it can now be done by coach.



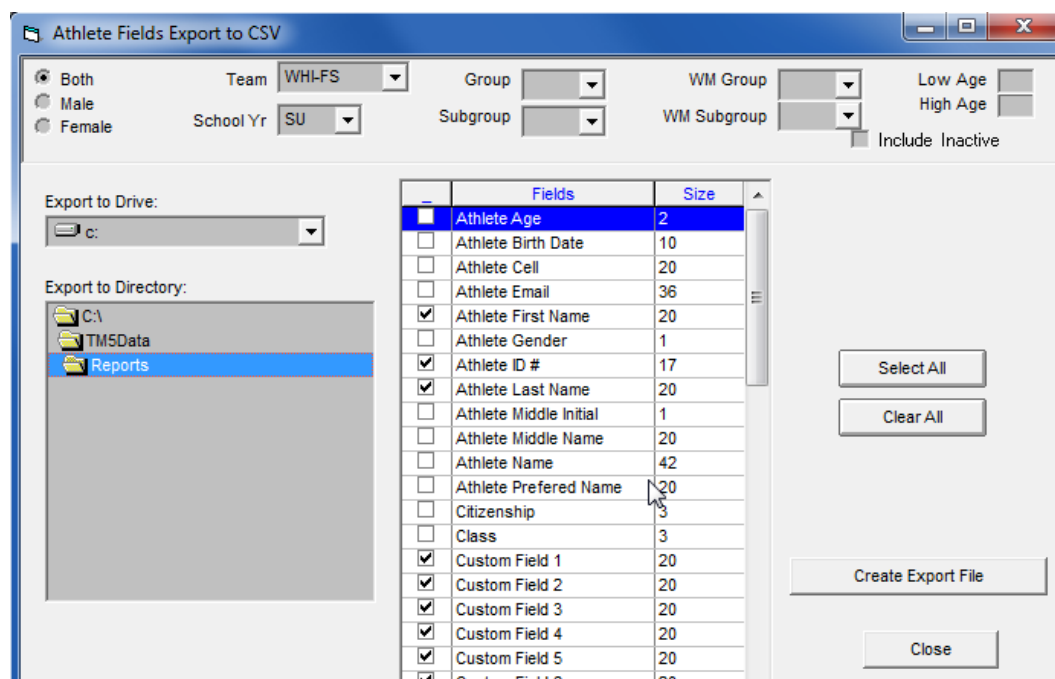
Generating Data in Excel

For those comfortable with excel, exporting data to a .CSV file (which can be opened with excel) can also be very useful. "File > Export > Athlete Fields in CSV Format"

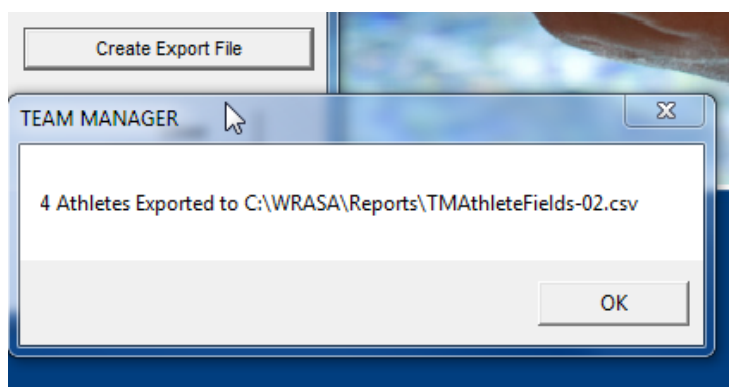


This is probably the best way to get all the custom field information info you entered. (there is a report for custom data, but it doesn't seem to show all the fields. Keep trying though, maybe it will be fixed in an update from Team Manager)

When exporting, choose the fields you want to see, and the location for the file



Create it



And you can then open the file in Excel

A	B	C	D	E	F	G	H	I	J
Ath Email	Custom2	Custom3	Custom4	First	ID#	Last	Pref		
elvis@heartbreakhotel.com	300			Elvis	FSWHI10055	Presley			
thesmitths@teting.com				Jane	FSWHI03042	Smith			
firstemail@someemail.com;seconemail@someemail.com;	400	125	125	Keli	FSWHI04005	Smith			
snake@reptile.com	500			Jake	FSWHI03023	Snake			

Teaching Excel and how this can then be used to create tax receipts with a 'Mail Merge' is beyond the scope of this document, but it's not too hard to do with a little research and practice. With just a little manipulation the Spreadsheet can be re-organized be a little more readable.

A	B	C	D	E	F	G	H	I	J	K
Last	First	Pref	ID#	Ath Email	Summer Fee	WM Sess	WM Sess	REG & Consent forms		
Presley	Elvis		FSWHI10055	elvis@heartbreakhotel.com	300			y,n		
Smith	Jane		FSWHI03042	thesmitths@teting.com						
Smith	Keli		FSWHI04005	firstemail@someemail.com;seconemail@someemail.com;	400	125	125	y,y		
Snake	Jake		FSWHI03023	snake@reptile.com	500			y,y		

Conclusion

Keeping track of swimmers and fees is the main job of registrars. Using these standards, the same rules will apply whether you are at the club, regional, or provincial level. Want to see how many summer swimmers we had this year? Easy to do. How many Winter Maintenance? Easy. How many swimmers that only joined for Winter Maintenance? Easily extracted. Want to know who paid for what? Or who is missing forms? If you've set up and entered the custom data when you registered the swimmers this is pretty easy to answer as well.

Hytek can be a great tool. Spending time at the setup, will save a lot of time later on.

Appendix 1 – Club Registrars Timeline

Important Dates for Club Registrars

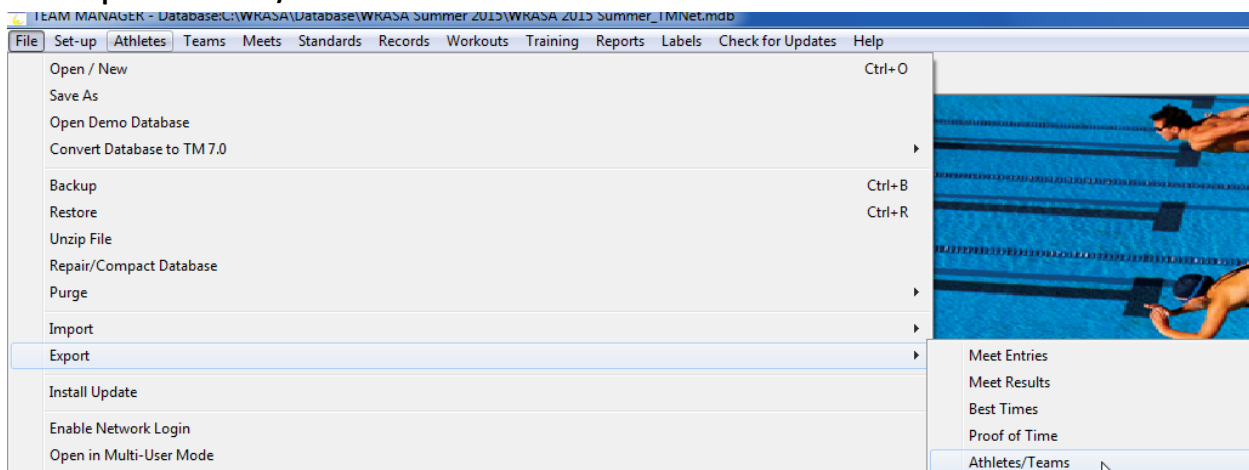
- ✓ **May 1**
 - **Start of Season.** All registered swimmers and coaches should be in Team Manager for the new year. Only swimmers and coaches designated as ‘active’ should be swimming or on deck. ‘Active’ generally means at least a portion of summer fees have been paid.
- ✓ **Three days before the Second Thursday in June**
 - **Submit Initial Roster to Regional Registrar.** Club registrars submit *unofficial* rosters to regional registrars. Regional Registrar will check the right files are received and ensure swimmers are in the proper BCSSA group (i.e. School Yr. = SU). To be submitted:
 - Export of entire club roster that regional registrar can import to Team Manager (.zip)
 - PDF of club roster that can be read
- ✓ ****Three days before the second Thursday in July ** - **Very important deadline****
 - **Submit Official Club Rosters to Regional Registrar.** Athletes must be included on this roster to be eligible for Regionals and Provincials. Regional Registrars will again check that swimmers are in the proper groups and categories. To be submitted:
 - Export of entire club roster that regional registrar can import to Team Manager (.zip)
 - **Printed Rosters, signed by head coaches, for each aquatic discipline.**
Coaches must ensure no athletes are missed.
 - BCSSA/Regional fee for all athletes & coaches on the roster.
- ✓ **Three days before the second Thursday in September**
 - **Submit Final Summer Roster.** If you had swimmers join the club after the official roster was sent in for the July deadline, submit another roster. To be submitted
 - Export of entire club roster that regional registrar can import to Team Manager (.zip)
- ✓ **Start of Winter Maintenance**
 - **Register swimmers** into proper groups for winter maintenance. Designate the WM Group & WM Sub-group for all winter Maintenance swimmers. Dates vary by club.
- ✓ **Second Monday in April**
 - **Submit Roster for Entire Season to Regional Registrar.** Regional Registrars will check that swimmers are correctly designated for summer/winter groups. To be submitted
 - Export of entire club roster that regional registrar can import to Team Manager (.zip)
 - PDF of NEW Winter Swimmers only (WM Subgroup = NEW)
 - BCSSA fee for the NEW Winter Maintenance Swimmers. (i.e. swimmers who did not swim the summer session and therefore owe BCSSA insurance fees for winter)

Appendix 2 - Exporting Rosters

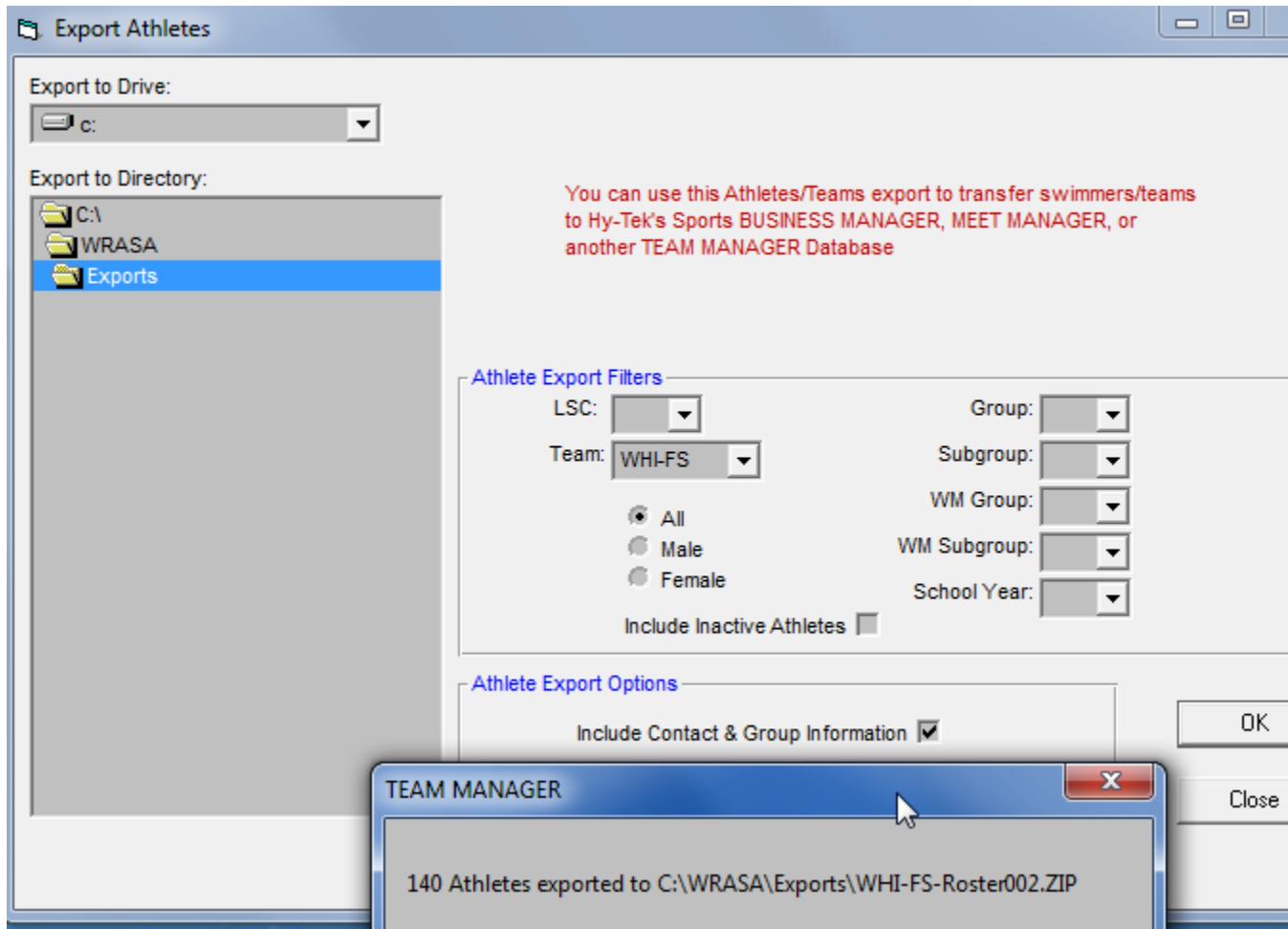
When submitting a roster to the Regional Registrar, generally 2 files are needed: the exported roster in .zip format and a roster report in .pdf format.

To Generate the Export File:

File > Export > Athletes/Teams

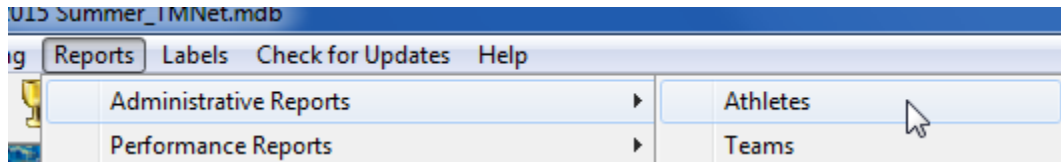


Be sure to check on the 'Include Contact & Group Information'. All Group fields can be left blank. Note where file is saved for attaching to email later.

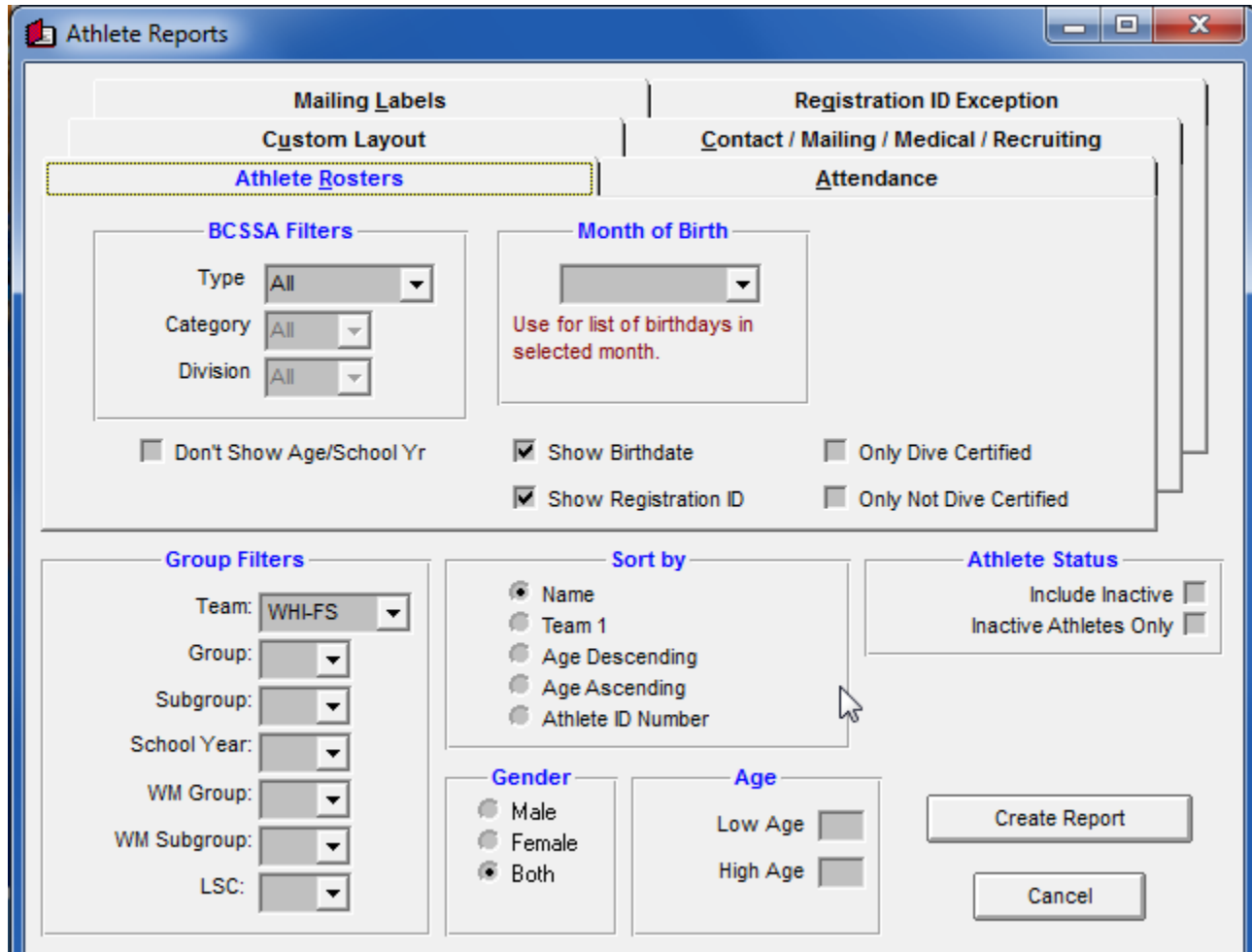


To Generate the Roster Report in PDF Format:

Reports > Administrative Reports > Athletes



Whole club:



Winter Maintenance New Only:

Same as above, but add on WM Subgroup = 'NEW'

A screenshot of a 'Group Filters' form. It contains several dropdown menus: Team (WHI-FS), Group, Subgroup, School Year, WM Group, WM Subgroup (highlighted in blue with the text 'NEW'), and LSC.

Swimming, Water Polo, Synchro or Diving only:

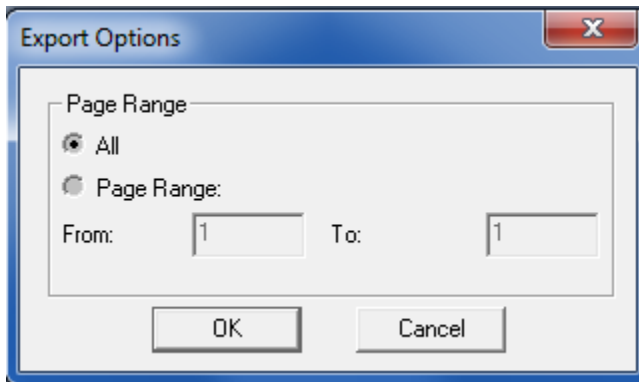
Same as above, but choose a BCSSA Filter Type

Four screenshots of the 'BCSSA Filters' form, each showing a different sport type selected in the 'Type' dropdown menu. The other fields (Category and Division) are set to 'All'. The sport types shown are Water Polo, Synchro, Diving, and Swimming.

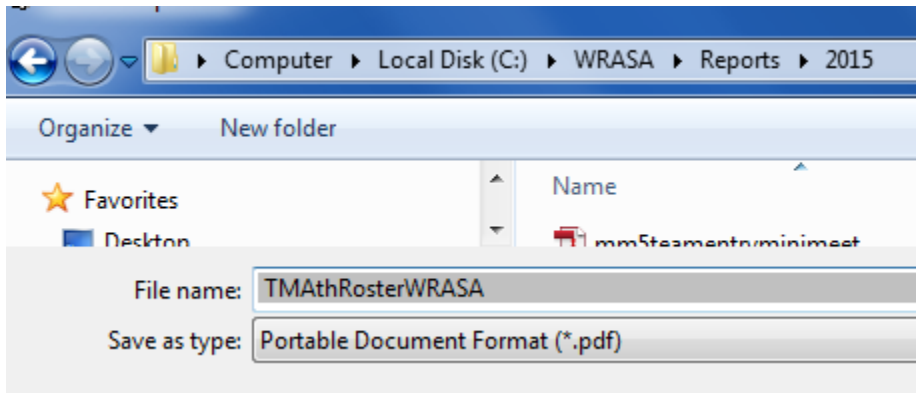
Create the Report, then use the 'export' (the icon in the top left corner) to save it in PDF format

A screenshot of a report preview window titled 'Print / Export Reports'. The window shows a report header with 'Licensed To: White Rock Amateur Swim Club' and 'HY'. An 'Athlete Roster' report is being previewed. An 'Export' dialog box is open in the foreground, showing 'Format: Adobe Acrobat (PDF)' and 'Destination: Disk file'. The 'Export' dialog box has 'OK' and 'Cancel' buttons.

Choose all Pages:



Choose a file location. Tip – include your Team Name in the file name.



Report can now be printed for coaches to review & sign and then attached to email for submission to Regional Registrar. Club should keep original signed rosters and bring to Regionals.

The Regional Registrar will have the email copy to back up any discrepancies at Regionals and bring the clubs' originals to Provincials as back up.