

# Creating Employee Records

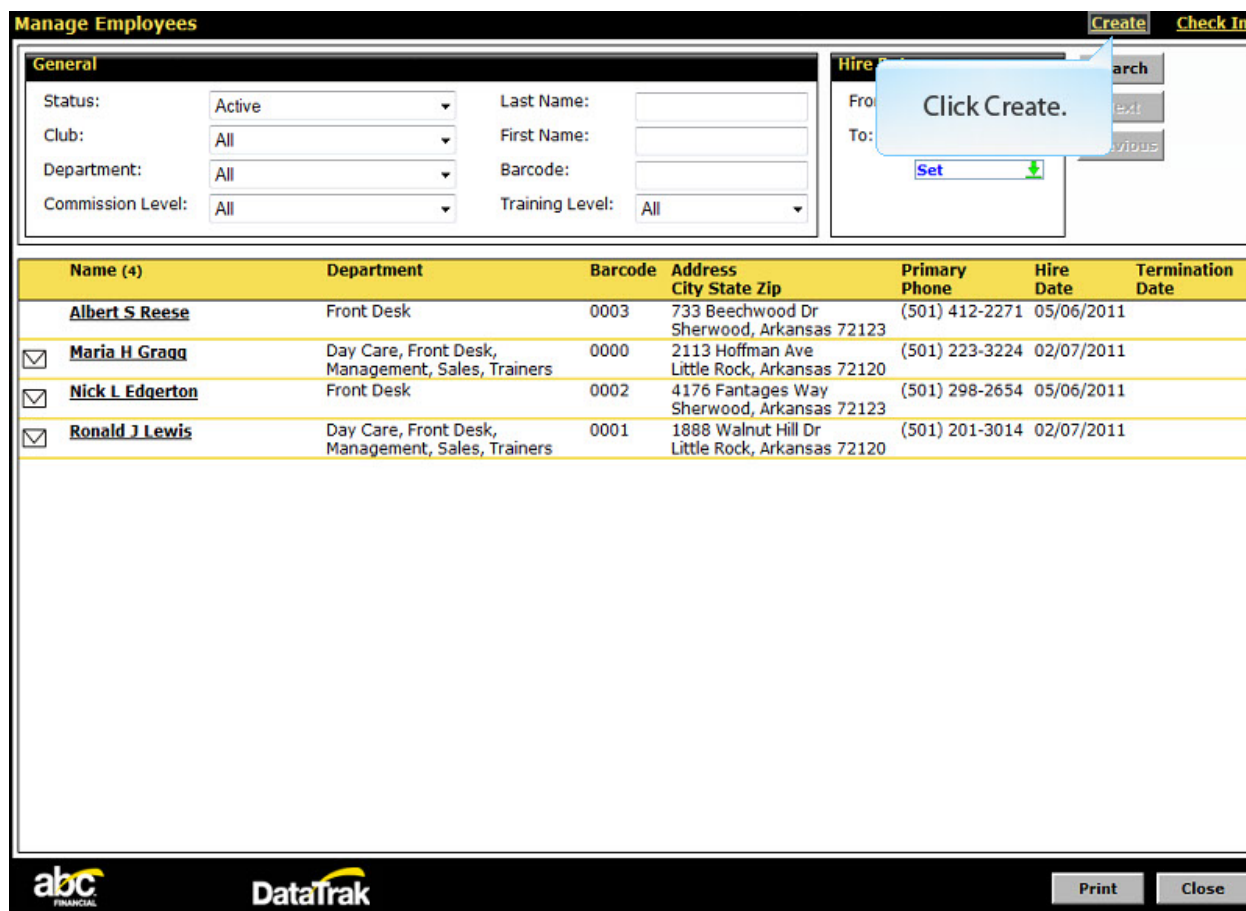
October 25, 2012

DataTrak makes managing employees at your club easy and convenient. Through DataTrak you can quickly create new employee records to maintain contact and employment information all in one place.

This document provides step-by-step instructions for creating employee records in DataTrak.

## *To create an employee record*

1. Click **Setup**.
2. In the Employee submenu, click **Manage**.
3. On the Manage Employees page, click **Create**.



Name (4)	Department	Barcode	Address City State Zip	Primary Phone	Hire Date	Termination Date
<u>Albert S Reese</u>	Front Desk	0003	733 Beechwood Dr Sherwood, Arkansas 72123	(501) 412-2271	05/06/2011	
<input checked="" type="checkbox"/> <u>Maria H Gragg</u>	Day Care, Front Desk, Management, Sales, Trainers	0000	2113 Hoffman Ave Little Rock, Arkansas 72120	(501) 223-3224	02/07/2011	
<input checked="" type="checkbox"/> <u>Nick L Edgerton</u>	Front Desk	0002	4176 Fantages Way Sherwood, Arkansas 72123	(501) 298-2654	05/06/2011	
<input checked="" type="checkbox"/> <u>Ronald J Lewis</u>	Day Care, Front Desk, Management, Sales, Trainers	0001	1888 Walnut Hill Dr Little Rock, Arkansas 72120	(501) 201-3014	02/07/2011	

- | <b>Edit Employee</b>  |   | <b>Check In</b>                        |
|-----------------------|---|--|
| <b>Active</b>         |   |  |
| <b>Personal</b>       |   | <b>Employment</b>                      |
| * First Name:         | Katie M.I.: <input type="checkbox"/>            | Hire Date: 06/17/2011                  |
| * Last Name:          | <input type="text"/>                            | Termination Date: <input type="text"/> |
| Title:                | Select <div>Type the First Name.</div>          | Hourly Wage: 0.00                      |
| Birthday:             | <input type="text"/>                            | Sales Commission Level: None ▾         |
| Social Security #:    | <input type="text"/>                            |  |
| <b>Contact</b>        |   | <b>Online</b>                          |
| Primary Phone:        | <input type="text"/>                            | Profile:<br>(4000/4000)                |
| Work Phone:           | <input type="text"/> Ext.: <input type="text"/> |  |
| Mobile Phone:         | <input type="text"/>                            |  |
| Fax Phone:            | <input type="text"/>                            |  |
| Emergency Phone:      | <input type="text"/> Ext.: <input type="text"/> |  |
| Street Address:       | <input type="text"/>                            |  |
| City:                 | <input type="text"/>                            |  |
| State:                | AR ▾ Zip Code: <input type="text"/>             |  |
| E-Mail:               | <input type="text"/>                            |  |
| E-Mail Updates:       | No ▾  |  |
| Text Message Updates: | No ▾  |  |
|                       |   | <b>Photo</b> <b>Take</b>               |
|                       |   | <div>NO<br/>PHOTO</div>                |

5. Type the employee's **Last Name**.

**Edit Employee**
[Check In](#)

**Active**

**Personal**

\* First Name:  M.I.: ☐


\* Last Name:


Title:


Birthdate:

Social Security #:

**Employment**

Hire Date:  

Termination Date:  

Hourly Wage:  

Sales Commission Level:

**Contact**

Primary Phone:

Work Phone:  Ext.:

Mobile Phone:

Fax Phone:

Emergency Phone:  Ext.:

Street Address:

City:


State:  Zip Code:

E-Mail:

E-Mail Updates:

Text Message Updates:



**Online**

Profile: (4000/4000) 

**Photo**

NO  
PHOTO

[Take](#)

General - Step 1 of 3
Previous
Next

Finish
Cancel

6. Select the employee's **Title**.

**Edit Employee**
[Check In](#)

**Active**

**Personal**

\* First Name:  M.I.: ☐

\* Last Name:

Title: 

Select One

Birthdate: 

Select One

Social Security #: 

CEO - Chief Executive Officer  
Accountant  
CFO - Chief Financial Officer  
Co-Owner  
Director

**Contact**

Primary Phone:

Work Phone:

Mobile Phone:

Fax Phone:

Emergency Phone:   Ext.:

Street Address:

City:

State: 

AR

 Zip Code:

E-Mail:


E-Mail Updates: 


No


Text Message Updates: 

No

**Employment**

Hire Date:  

Termination Date:  

Hourly Wage:  

Sales Commission Level: 

None



**Online**

Profile: 

(4000/4000)

**Photo** [Take](#)

NO  
PHOTO

General - Step 1 of 3
[Previous](#)
[Next](#)
[Finish](#)
[Cancel](#)

7. Continue filling out the employee's **Personal**, **Contact**, and **Employment** information.

**Edit Employee**
[Check In](#)


**Active**

**Personal**

\* First Name:  M.I.: ☐


\* Last Name:


Title:


Birthdate: 

Social Security #:

**Employment**

Hire Date: 

Termination Date: 

Hourly Wage:  

Sales Commission Level:

**Contact**

Primary Phone:

Work Phone:

Mobile Phone:

Fax Phone:

Emergency Phone:  Ext.:

Street Address:

City:

State:  Zip Code:


E-Mail:

E-Mail Updates:



Text Message Updates:

**Online**

**Photo**



**Take**

General - Step 1 of 3
Previous
Next

Finish
Cancel

8. Once you're finished, click **Next**.

On this step fill in the employee's login information and select their Department and Security Roles.

9. Type the employee's **Barcode**.

Edit Employee: Katie Neilson
Check In

**System**

\* Barcode:

\* User Name:

\* DataTrak Password:

\* Re-enter Password:

ABC Support Password:

Re-enter Password:

Access Code:

Multi-Club Clock In/Out:

CRS User Id: None

**Select Roles**

Available		Selected
ALL ACCESS		
Front Desk		
Sales		
Trainer		

**Select Departments**

Available		Selected
Day Care		
Front Desk		
Management		
Sales		
Trainers		

Security - Step 2 of 3
Previous
Next

Finish
Cancel

10. Type the **User Name**.

**Edit Employee:** Katie Neilson
[Check In](#)

**System**

\* Barcode:

\* User Name:

\* DataTrak Password:

\* Re-enter Password:

ABC Support Password:

Re-enter Password:

Access Code:

Multi-Club Clock In/Out:

CRS User Id: None

**Select Roles**

Available		Selected
ALL ACCESS		
Front Desk		
Sales		
Trainer		

**Select Departments**

Available		Selected
Day Care		
Front Desk		
Management		
Sales		
Trainers		

Security - Step 2 of 3

Previous
Next

Finish
Cancel

11. Type the **Password**. The password must be a minimum of 7 characters long, and include at least one number.

**Edit Employee: Katie Neilson** [Check In](#)

System		Select Roles	
* Barcode:	0004	Available	Selected
* User Name:	kneilson	ALL ACCESS	
* DataTrak Password:	password1	Front Desk	
* Re-enter Password:		Sales	
ABC Support Password:		Trainer	
Re-enter Password:			
Access Code:			
Multi-Club Clock In/Out:	No		
CRS User Id:	None		

Type the Password.

Select Departments	
Available	Selected
Day Care	
Front Desk	
Management	
Sales	
Trainers	

abc FINANCIAL DataTrak Security - Step 2 of 3 Previous Next Finish Cancel

12. Type the password a second time.

The employee will be prompted to create their own password the first time they log in and can also reset it from the login screen if they forget it.



To add the selected item, click the **Add selected items** button.

Cancel

14. Select the employee's **Security Role**. This will determine what information and areas of DataTrak the employee will have access to. Only one Security Role should be selected.



To add the selected item, click the **Add selected items** button.

**Edit Employee: Katie Neilson** **Check In**

System	Select Roles															
<p>* Barcode: <input type="text" value="0004"/></p> <p>* User Name: <input type="text" value="kneilson"/></p> <p>* DataTrak Password: <input type="password" value="....."/></p> <p>* Re-enter Password: <input type="password" value="....."/></p> <p>ABC Support Password: <input type="password"/></p> <p>Re-enter Password: <input type="password"/></p> <p>Access Code: <input type="text"/></p> <p>Multi-Club Clock In/Out: <input type="text" value="No"/></p> <p>CRS User Id: <u>None</u></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Available</th> <th style="width: 10%;"></th> <th style="width: 30%;">Selected</th> </tr> </thead> <tbody> <tr> <td>ALL ACCESS</td> <td></td> <td></td> </tr> <tr> <td>Front Desk</td> <td></td> <td></td> </tr> <tr> <td>Sales</td> <td></td> <td></td> </tr> <tr> <td>Trainer</td> <td></td> <td></td> </tr> </tbody> </table> <div style="text-align: center; margin-top: 5px;"> <input type="button" value="→"/> <input type="button" value="→"/> <input type="button" value="←"/> <input type="button" value="←"/> </div>	Available		Selected	ALL ACCESS			Front Desk			Sales			Trainer		
Available		Selected														
ALL ACCESS																
Front Desk																
Sales																
Trainer																

To add the selected item, click the Add selected items button.

Select Departments	
<p>Available</p> <p>Day Care</p> <p>Management</p> <p>Sales</p> <p>Trainers</p>	<p>Selected</p> <p>Front Desk</p>

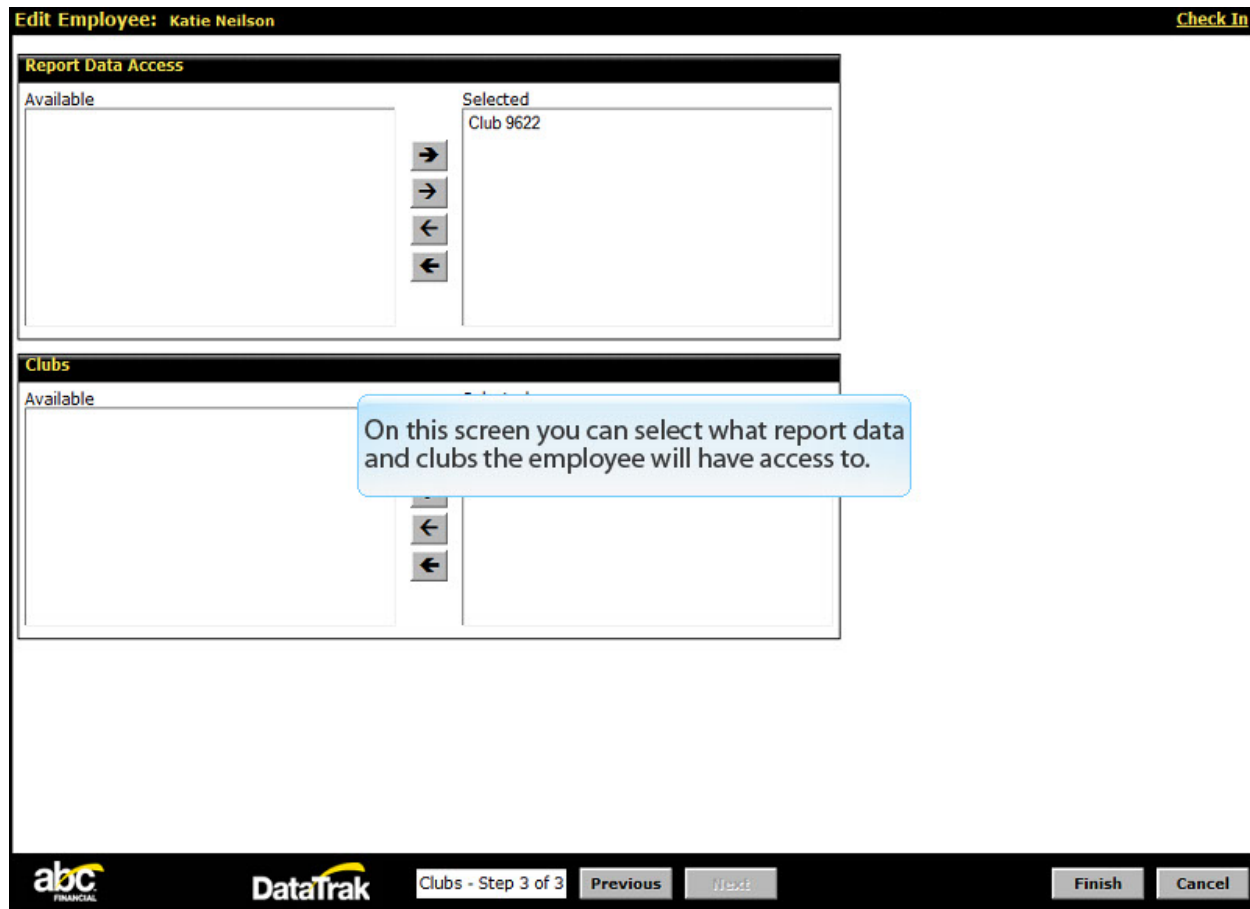
Security - Step 2 of 3

15. Click **Next**.

On this page you can select what report data and clubs the employee will have access to.

16. Select the clubs for which the employee will have **Report Data Access**.

17. Select the **Clubs** to which the employee will have access.



**Edit Employee: Katie Neilson** [Check In](#)

**Report Data Access**

Available

Selected  
Club 9622

**Clubs**

Available

On this screen you can select what report data and clubs the employee will have access to.

abc FINANCIAL DataTrak Clubs - Step 3 of 3 Previous Next Finish Cancel

18. Click **Finish**.

You have successfully added a new employee!

**Manage Employees**
[Create](#) [Check In](#)

**General**


Status: Active Last Name:


Club: All First Name:


Department: All Barcode:

Commission Level: All Training Level: All

**Hire Date**

From:  

To:  

[Set](#) 



[Search](#)

[Next](#)

[Previous](#)

Name (s)	Department	Barcode	Address City State Zip	Primary Phone	Hire Date	Termination Date
<a href="#">Albert S Reese</a>	Front Desk	0003	733 Beechwood Dr Sherwood, Arkansas 72123	(501) 412-2271	05/06/2011	
<input checked="" type="checkbox"/> <a href="#">Katie Neilson</a>	Front Desk	0004	123 Street Little Rock, Arkansas 72123	(501) 123-1234	06/17/2011	
<input checked="" type="checkbox"/> <a href="#">Maria H Gragg</a>	Day Care, Front Desk, Management, Sales, Trainers	0000	2113 Hoffman Ave Little Rock, Arkansas 72120	(501) 223-3224	02/07/2011	
<input checked="" type="checkbox"/> <a href="#">Nick L Edgerton</a>	Front Desk	0002	4176 Fantages Way Sherwood, Arkansas 72123	(501) 298-2654	05/06/2011	
<input checked="" type="checkbox"/> <a href="#">Ronald J Lewis</a>	Day Care, Front Desk, Management, Sales, Trainers	0001	1888 Walnut Hill Dr Little Rock, Arkansas 72120	(501) 201-3014	02/07/2011	

We have successfully added a new employee.

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