

# **Managing Lockers**

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# **About Locker Management**

DataTrak's new Locker Management feature gives you a simple way to manage locker rentals for your members. With the appropriate <u>security roles</u> you can

- Activate lockers for the club and select the locker number field to display at check in.
- <u>Set locker security roles for an employee</u>.
- <u>Create or replace locker locations.</u>
- Create or replace locker types.
- <u>View all available lockers</u>.
- <u>Create, edit, or delete one or more lockers</u>.
- Assign a locker to a member.
- Run reports



# Locker Agreement

The member must pay for the locker if the club charges a monthly or one-time fee. At this time, lockers are not attached to POS. Therefore, you must add the locker rental as a secondary schedule to your payment plans or create a recurring service agreement for the locker rental.

Please note the following:

- Payment plans must have the ability to set up the default pricing for PIF (paid in full) or recurring services, or the item must be created with the default PIF pricing.
- If you have security access to change the pricing of a plan or recurring service you can modify the pricing when creating the agreement or at POS.
- When a recurring service is used, it will follow the normal flow for recurring services. However, it will not drop any services.

## Locker Record

The locker record must be unique for locker Number, locker Location, and locker Type. Each locker record contains the following fields.

Field	Description	Required
Number	Up to 50 alpha-numeric + space characters	Yes
Location	Up to 50 alpha-numeric + space characters	Yes
	This is a configurable list of locker areas such as female, male, or spa.	
Туре	Up to 50 alpha-numeric + space characters	Yes
	This is a configurable list of locker types—typically locker size such as small, medium, or large—but could also be used for safety deposit box.	
Description	Up to 250 alpha-numeric + space characters	No
Status	Active or Inactive	Yes
Locker Status	Unassigned, Assigned, Expired, or Broken	Yes
Combination	Up to 25 alpha-numeric characters	No
	This field only appears on the locker management page and report (not on the member page).	
Original Start Date	MM/DD/YYYY date format and field	No
	This is the date the member will start to use the locker.	
Current Start Date	MM/DD/YYYY date format and field	No
	This is the date the member will start to use the locker or the renewal date.	

#### **Table 1: Locker Record Field Descriptions**



Field	Description	Required
Expire Date	MM/DD/YYYY date format and field	No
	This is the date that the member will stop using the locker unless the member makes further arrangements.	
	If left blank and assigned to a member, the locker is assigned to the member indefinitely.	
	When the expire date has been reached and the member has not made prior arrangements that change the expire date, the locker is put into a released or hold status.	

# **Setting Locker Defaults**

You can use the Edit Club page to activate lockers and select the Locker Number field to display at check in.

For step-by-step instructions, see the following topics:

- <u>Activating lockers</u>
- Displaying locker numbers at check in

## **Activating Lockers**

You can activate lockers from the Edit Club > Defaults page. You can also choose to require an expiration date for lockers.

To activate lockers

- 1. Click Setup.
- 2. In the Settings submenu, click **Clubs**.
- 3. On the Manage Clubs page, click the desired club link in the Club Number column.
- 4. Click the Defaults tab.
- 5. In the Lockers section
  - o Set Manage Lockers to Yes.



o To require a locker expiration date, set Require Expiration Date to Yes.

t Club Eral Defaults Pos Receipts	NEW AGREEMENT AGREEMENT LAYO	UT FAST ADD
)efault		
Max Kids Club Minutes:	120	
Convert Process:	New Agreement	~
Membership Gender:	Female	*
Club Item for New Agreements:	Down Payment	(Remove)
Allow Secondary Members:	Yes	*
Allow Club Managed Members:	No	~
Brand:	None	*
Club Manages		
Barcodes: No		
Membership Types: No		
Sales Person: No		
Online		
Scheduling Appointments: Ye	s	
scheduling Classes: Ye	s	
Agreements: Ye	s	
Prospects: Ye	S	
ockers		
ockers		
Manages Lockers: Yes	*	

6. Click Save.

## **Displaying Locker Numbers at Check In**

You can select the Locker Number field on the **Check In** tab on the Edit Club page.

**Note:** This will only show the assigned locker number and not the combination.

To display locker numbers at check in

- 1. Click Setup.
- 2. In the Settings submenu, click **Clubs**.
- 3. On the Manage Clubs page, click the desired club link in the Club Number column.
- 4. On the Edit Club page, click the **Check In** tab.

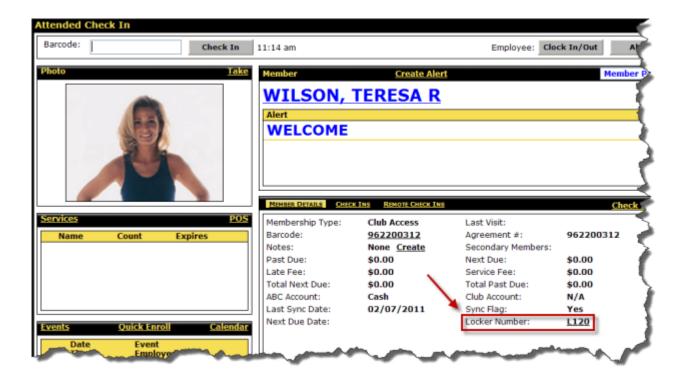


5. In the Check In Member Fields section select the **Locker Number** field in the Available column and move it to the Selected column.

Edit Club General Defaults	Pos	RECEIPTS	NEW AGREEMENT	AGREEMENT LAYOUT	FAST ADD	CHECK IN	RECL
Check In Member Available Agreement Misc 1 Agreement Misc 2 Agreement Misc 3 Agreement Term Begin Date Campaign City			Sele	ected xt Due Date cker Number			
Campaign				~~~		~~	L

6. Click Save.

The Locker Number field appears on the attended check in page.





# **Setting Security Roles**

Security roles allow you to designate which employees can view or create items in Locker Configuration.

A description of the available security roles is provided in the following table.

Security Role	Description
Locker – Create	Allows you to create lockers.
Locker – Delete	Allows you to delete lockers.
Locker – Edit	Allows you to modify lockers.
Locker Combination – View	Allows you to view the member's locker combination.
Locker Configuration – View	Allows you to view the Locker Configuration page.
Locker Location – Create	Allows you to create locker locations.
Locker Location – Edit	Allows you to modify locker locations.
Locker Type – Create	Allows you to create locker types.
Locker Type – Edit	Allows you to modify locker types.

Table 2: Locker Security Roles

To set locker security roles

- 1. Click Setup.
- 2. In the Employees submenu, click **Security Roles**.
- 3. Select the desired security role to edit or click **Create** to add a new one.
- 4. If creating a new security role, enter a Name.
- 5. In the Lockers section, select **Yes** for the security roles you wish to activate.
- 6. When finished, click **Save**.



The following is an example of the Lockers security roles.

Edit Security Access Roles	7
General	L
* Name:	)¢
① Click on a security function for a description of its usage.	l
Functions Expand All	ł
- No (All) V Lockers	
No 🔽 Locker - Create	Ľ
No 💙 Locker - Delete	
No 💌 Locker - Edit	
No 💟 Locker Combination - View	ð
No 💟 Locker Configuration - View	2
No 💌 Locker Location - Create	
No 💌 Locker Location - Edit	Ę
No 💌 Locker Type - Create	ļ
No 🔽 Locker Type - Edit	5
+ No (All) Member Facing	ſ

# **Configuring Lockers**

The Locker Configuration page allows to you view and manage lockers, locker locations, and locker types.

**Note:** Security roles determine who can access the Locker Configuration page and who can create, edit, or delete lockers, locations, or types. (For more information, see "<u>Setting Security Roles</u>.")

On the Locker Configuration page you can

- Filter the list by Status, locker Type, Locker Status, Club, locker Location, locker Number, and Expire Date. The list will display all lockers based on the search criteria.
- Sort the list by any of the fields in the list.
- Print or export the locker list that is on the page based on the sort and filters.
- Click the link in the Number column to view the Edit Locker page.



• Click the link in the Member column to go to that member's page. The following is an example of the Locker Configuration page.

	LOCATIONS	TYPES					_			
enera							Expire D	ate		Search
Statu	s:	Active	*	Club:	Club 9622	*	From:		1.8	
Type:		All	~	Location:	All	~	To:		118	
Locke	r Status:	All		Number:	-			Set	•	
		All	×							
Club	Locati	on	Number		Locker	Member		Expire	Туре	
(84) 9622	Ladice	Locker Room	1110		Status Unassigned			Date	Standard	
9022	Laules	Locker Koom	L119		onassigned				standard	
9622	2 Ladies	Locker Room	L120		Assigned	TERESA R WILSON	l	03/01/2012	Standard	
9622	2 Mens L	ocker Room	<u>M101</u>		Assigned	TONY J MCMAHAN		03/01/2012	Standard	
	2 Mens L	ocker Room	M102		Unassigned				Standard	

## **Managing Locker Locations**

One of the fields that makes a locker record unique is the locker Location. Before you can create a locker, you must have a locker location. You can create locker locations as appropriate for your club.

For example, if your club provides lockers in the men's and women's locker rooms, the locations could be created accordingly as shown in the image below.

Locker Configuration	Replace	<u>Create</u>	2
Status: Active V Club: Club 9622 V Search			7
Name (4) ABC Code	Club	5	~
CLUB CLUB	9622	2	
Mens Locker Room	9622	2	
Womens Locker Room	9622	2	- 1
and the second state of the second state of the second state of the	all and a		N

For step-by-step instructions, see the following topics:

- <u>Creating locker locations</u>
- Replacing locker locations

#### **Creating Locker Locations**

If you have the appropriate <u>security roles</u>, you can create new locker locations.

To create a locker location

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.



- 3. On the Locker Configuration page, click the **Locations** tab.
- 4. Click Create.

The Edit Locker Location page appears.

Edit Locker Lo	ocation	Club: All	
Active			
<ul> <li>Name:</li> <li>ABC Code:</li> </ul>	Mens Locker Room		
Clubs:	Available	Selected Club 9622	
	- manana	مسر ود دو معرب المس	مسسم

- 5. Type a location **Name** (required).
- 6. Select the **Clubs** that will use this locker location.
- 7. Click Save.

#### **Replacing Locker Locations**

If your lockers are moved to a different physical location, you can replace the location assigned to those lockers.

For example, the club has moved all lockers from the main Club building to the Annex, and wishes to show the new location in DataTrak.

To replace a locker location

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.
- 3. On the Locker Configuration page, click the **Locations** tab.
- 4. Click Replace.



The Replace Locker Location dialog box appears.

Status: Active Clu	Club 9622 V	Seurch		
Name (5)			ABC Code	
Annex			CLUD	
<u>Club</u> .adies Locker Room			CLUB	
Mens Locker Room Womens Locker Room	Replace Locker	Location		×
	Club:	Club 9622	•	
	Location:	Select One	•	
	New Location:	Select One	•	
	Type:	All	•	
	Number Prefix			
	Number Suffix			
	Low Number:			
	High Number:			
	Sample:			

- 5. Select the current locker **Location**.
- 6. Select the **New Location**.
- 7. Select the locker Type.
- 8. Type the **Number Prefix** (if applicable).
- 9. Type the Number Suffix (if applicable).
- 10. Type the Low Number.
- 11. Type the High Number.
- 12. Click Replace.



A confirmation message will appear indicating that the change was made.

Replace Locker	Location			×
Club:	Club 9622		*	
Location:	Club		*	
New Location:	Annex		*	
Type:	Standard		*	
Number Prefix				
Number Suffix				
Low Number:	20			
High Number:	25			
Sample:	20			
6 lockers change	ed	×	Replace	Close

13. Click Close.

# **Managing Locker Types**

Another field that makes a locker record unique is the locker Type. Before you can create a locker, you must have a locker type. You can create locker types as appropriate for your club.

For example, if your lockers come in three sizes you might want to create locker types of Small, Medium, and Large. If your club only offers one locker size, you might create a locker type of Standard.

		onfiguration ocations Types	Replace	Create
	Status:	Active Y Search		
l	Name (1)	Usages	ABC Code	
I	Name (1) Standard	46	STANDARD	1
ŀ	~~~~	and the second second second	Some share so and a second	and the second second

For step-by-step instructions, see the following:

- <u>Creating locker types</u>
- Replacing locker types



### **Creating Locker Types**

If you have the appropriate security roles, you can create new locker types.

To create a locker type

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.
- 3. On the Locker Configuration page, click the **Types** tab.
- 4. Click Create.

The Edit Locker Type page appears.

Edit Locker Ty	pe
Active	
* Name:	
ABC Code:	
Usages:	0 🦿
	Jack Street Barrier

- 5. Type a Name (required).
- 6. Click Save.



### **Replacing Locker Types**

If your locker types change, you can replace the type assigned to particular lockers.

For example, club ABC has a single standard locker type, but purchased large and small lockers to replace them. Now the club needs two locker types, Large and Small, and needs to change the locker numbers assigned to a particular locker type.

To replace a locker type

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.
- 3. On the Locker Configuration page, click the **Types** tab.
- 4. Click **Replace**.

The Replace Locker Type dialog box appears.

rge andard	0 46		
andard	46		
			STANDARD
	Replace Locker	Тура	>
	Replace Locker	туре	
	Club:	Club 9622	•
	Type:	Select One	•
	New Type:	Select One	•
	Location:	All	-
	Number Prefix		
	Number Suffix		
	Low Number:		
	High Number:		
	Sample:		

- 6. Select the **New Type**.
- 7. Select the locker **Location**.
- 8. Type the Number Prefix (if applicable).
- 9. Type the Number Suffix (if applicable).



- 10. Type the Low Number.
- 11. Type the High Number.
- 12. Click Replace.

A confirmation message will appear indicating that the change was made.

Replace Locker	Туре			×
Club:	Club 9622	*		
Type:	Standard	*	]	
New Type:	Large	*	]	
Location:	Annex	*	]	
Number Prefix				
Number Suffix			]	
Low Number:	20		]	
High Number:	25		]	
Sample:	20			
6 lockers change	ed	×	Replace	Close

13. Click Close.

## **Managing Lockers**

The Lockers tab on the Locker Configuration page allows you to search for and view available lockers, and you can create, edit, or delete lockers.

**Note:** No two lockers can have the same locker number, location, and type—this makes up the unique key.

For step-by-step instructions, see the following topics:

- <u>Creating a single locker</u>
- <u>Creating multiple lockers</u>
- Editing lockers
- <u>Viewing locker history</u>
- Deleting lockers



#### **Creating a Single Locker**

You can create one locker at a time. If any of the information you enter is invalid, you will be prompted to correct it.

To create a single locker

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.
- 3. On the Locker Configuration page, make sure the Lockers tab is selected.
- 4. Click Create.

The Create Locker page appears.

	Club:	Club 9622	*
*	Location:	Select One	*
*	Type:	Standard	*
	Creation Mode:	Single	*
*	Number:		
	Description:		
	Combination:		

5. Select the locker **Location** (required).

Only the active locker locations are available in the list.

- Select the locker **Type** (required).
   Only the active locker types are available in the list.
- 7. In the Creation Mode list, select Single.
- 8. Type a locker Number (required).
- 9. Type a **Description** for the locker.
- 10. Type the locker **Combination**.



#### 11. Click Create.

A confirmation message will appear indicating that the locker was created.



12. Click Close.

#### **Creating Multiple Lockers**

You can create multiple lockers at one time by entering a numeric range.

To create multiple lockers

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.
- 3. On the Locker Configuration page, make sure the **Lockers** tab is selected.
- 4. Click Create.
- 5. Select the locker **Location** (required).
- 6. Select the locker **Type** (required).
- 7. In the Creation Mode list, select Multiple.
- 8. Type a **Description** for the locker.
- 9. If applicable, type a **Number Prefix** (for example, M for Male or F for Female).
- 10. If applicable, type a Number Suffix.
- 11. Type the **Low Number** that represents the start of the locker range.
- 12. Type the **High Number** that represents the end of the locker range.

**Note:** The sum of the locker prefix and maximum number cannot exceed the max length for locker number. (For more information, see "<u>Locker Record</u>.")

- 13. To include leading zeros in the locker number, select Yes.
- 14. If leading zeros are included, select the Minimum Digits (you can select from 2 10).



The following is an example of the completed page.

Cre	eate Locker	
	Club:	Club 9622 -
*	Location:	Mens Locker Room 🔹 🔰
*	Type:	Standard 🔹 👗
	Creation Mode:	Multiple -
	Description:	<b>\$</b>
	Number Prefix	M
	Number Suffix	₹
*	Low Number:	1
*	High Number:	20
*	Leading Zeros:	Yes 🔹
*	Minimum Digits:	2 •
	Sample:	M01
		- Aller and and and

#### 15. Click Create.

A confirmation message will appear indicating the number of lockers that were created.



16. Click Close.

#### **Editing Lockers**

You can edit a variety of locker information including the Location, Type, Description, Combination, and Member associated with the locker. You can also indicate if the locker is broken.

To edit lockers

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.



3. On the Locker Configuration page, click the desired locker number link in the **Number** column.

The Edit Locker page appears.

Active				
eneral	Ch.+ 0622		Members Name (1)	Add
Club: Number: Locker Status:	Club 9622 L101 Assigned		DIANE R MARTINEZ	×
Location:	Ladies Locker Room	~		
Type:	Standard	~		
Description:				
Combination:				
Broken:	No	~		
Start Date:	03/01/2011			
Expire Date:	09/30/2011 🔢			

- 4. On the General tab change or add information as needed:
  - o Select a new locker Location.
  - o Select a new locker Type.
  - o Type or edit the locker **Description**.
  - o Type the locker Combination.
  - o Select **Yes** to indicate that the locker is **Broken**.
  - o Add a Member.
  - o If a member is selected, you can edit the **Start Date**.
  - o If a member is selected, you can edit the **Expire Date**.
- 5. Click Save.



### **Viewing Locker History**

To view locker history

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.
- 3. On the Locker Configuration page, click the desired locker number link in the **Number** column.
- 4. On the Edit Locker page, click the **History** tab.

The locker history displays the date and time of each change, the action taken, the new value, and the employee and override employee who made the change.

Action: All	Date Sea	rch	
Date/Time (14)	Action	New Value	Employee Override Employee
03/02/2011 11:05:36 am	Changed Broken	Yes	Stephanie Wilder
03/02/2011 11:05:36 am	Changed Start Date	03/01/2011	Stephanie Wilder
03/01/2011 03:12:30 pm	Changed Member	Added DIANE R MARTINEZ	abctech
03/01/2011 03:12:30 pm	Changed Expire Date	09/30/2011	abctech
03/01/2011 03:12:30 pm	Changed Start Date	03/01/2011	abctech
03/01/2011 03:10:16 pm	Original Type	Standard	abctech
03/01/2011 03:10:16 pm	Original Location	Ladies Locker Room	abctech
03/01/2011 03:10:16 pm	Original Broken	No	abctech
03/01/2011 03:10:16 pm	Original Status	Active	abctech
03/01/2011 03:10:16 pm	Original Description		abctech
03/01/2011 03:10:16 pm	Original Combination	8	abctech
03/01/2011 03:10:16 pm	Original Expire Date		abctech
03/01/2011 03:10:16 pm	Original Start Date		abctech
03/01/2011 03:10:16 pm	Original Member		abctech

### **Deleting Lockers**

If necessary, you can delete one or more lockers.

**Note:** When you delete lockers, the status is set to **Delete** and the lockers are removed from view, but the locker record is kept for historical purposes.

To delete one or more lockers

- 1. Click Setup.
- 2. In the Members Setup submenu, click Locker Configuration.



On the Locker Configuration page, click **Delete**.
 The Delete Lockers page appears.

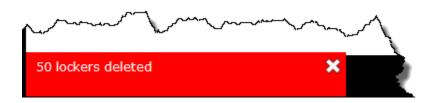
Delete Lockers		
Club:	Club 9622 -	Ċ,
* Location:	Select One 👻	- 🌛
Number Prefix		1
Number Suffix		
* Low Number:		- 1
* High Number:		- 5
* Leading Zeros:	No	- 🦿
* Minimum Digits:	4	- 2
Sample:		- 7
-	And the second	

- 4. Select the locker **Location** (required).
- 5. If applicable, type the locker **Number Prefix**.
- 6. If applicable, type the locker **Number Suffix**.
- 7. Type the **Low Number** that represents the start of the locker range you wish to delete.
- 8. Type the **High Number** that represents the end of the locker range you wish to delete.

**Note:** If you are only deleting a single locker, type that locker number in both the Low Number and High Number fields.

- 9. If the locker has leading zeros, click **Yes**.
- 10. If the locker has leading zeros, select the Minimum Digits.
- 11. Click **Delete**.

A confirmation message will appear indicating that the lockers were deleted.



12. Click Close.



# **Assigning Lockers to Members**

Assigning lockers to members is a manual process. One member can have more than one locker assigned to them at any one time. Each locker can have a start date, expire date, and locker combination.

On the member's page you can

- Add a locker
- Release or change a member's locker
- View a member's locker history

## Adding a Locker

This section describes how to add a locker from the member's Personal page. However, you can also add a member to a locker on the <u>Edit Locker</u> page.

To assign a locker to a member from the member's personal page

- 1. Point to the main Menu.
- 2. In the Members submenu, click Manage.
- 3. Find the desired member.
- 4. On the member's Personal page in the Locker section, click Add.

<u>}</u>	~~~~~	$\sim\sim\sim\sim\sim\sim\sim$	~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	- Marine	
ke	LOCKER	RINT					
(1	History /	vdd					
	Club Location	Locker Status	Number	Start Date Expire Date	Туре	Member	
211	None found						
7							
ŞЦ							
<b>_</b>							
<b>A</b> lira	ak					Delete	Close



The Add Locker page appears.

			<u>Edit</u> De	mographics			Edit
me: nder: .dd Locker	DIANE R MARTIN Female	EZ		treet: ity:	3838 TROUSER LE SHERWOOD	G RD	×
Option:	Add Available	>					
Number: Club:	Club 9622	*	Search				
Location:	All	~					
Type:	All	~					
Club	Location (84)	Number	Туре	Status	Expire Date	Member	
9622	Ladies Locker Room	<u>L101</u>	Standard	Unassigned			
9622	Ladies Locker Room	L102	Standard	Unassigned			
9622	Ladies Locker	L103	Standard	Unassigned			
9622	Room						
		L104	Standard	Unassigned			
9622	Room Ladies Locker	L104 L105	Standard Standard	Unassigned			
9622	Room Ladies Locker Room Ladies Locker						

5. Find an available locker in the list and click the link in the **Number** column.

If necessary, you can enter search criteria to refine the list by number, club, location, or type in the upper section and then click **Search**.

6. If the locker is available, the Confirm Add Locker dialog box will appear.

Confirm Add	Locker	×
Club: Location: Number: * Expire Date	Club 9622 Mens Locker Room M102	
		OK Cancel

7. Enter an **Expire Date** if appropriate.



#### 8. Click OK.

The locker information appears on the member's Personal page.

LOCKER	FINGERPRINT						
Histor	y <u>Add</u>						
Club Loca	) ation (1)	Locker Status	Number	Start Date Expire Date	Туре	Member	
962 Men Rooi	s Locker	Assigned	<u>M102</u>	03/02/2011	Standard	CLAYTON M KING	x

## **Releasing or Changing a Member's Locker**

You can easily release or change lockers for members in the manage member section.

Note: If the member becomes inactive, the locker status is changed to Unassigned.

To release a locker assigned to a member

Click the **Delete** button next to the assigned locker.

This will remove the locker from the member's Locker tab, set the Locker status to **Unassigned**, and set the start date, expire date, and combination back to blank.

	LOCKER	FINGERPRINT					
	Histor	y <u>Add</u>					
	Club Loca	) ation (1)	Locker Status	Number	Start Date Expire Date	Туре	Member
	962 Men Roor	s Locker	Assigned	<u>M102</u>	03/02/2011	Standard	CLAYTON M KING
1							

To change a locker assigned to a member

- 1. Click the **Delete** button to remove the current locker.
- 2. Click Add to select a different locker.

**Note:** If the locker location or locker type changes, DataTrak will inform you that this change may result in a rental amount change – please review the agreement.

- If the new locker cost is the same amount, does not extend or shorten the length of term, and does not require a change fee, you can select the new locker on the page.
- o If the new locker changes the amount owed, extends or shortens the term length, or requires a change fee, you will be directed to POS and rewrite the agreement.

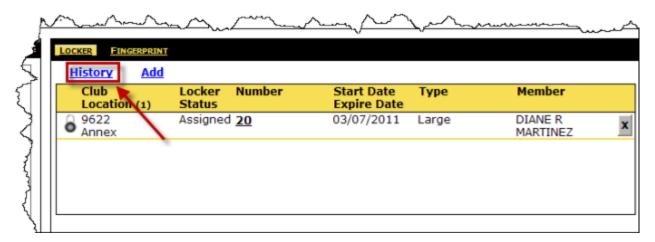


## Viewing a Member's Locker History

In addition to viewing the history for a particular locker, you can view a member's locker history.

To view a member's locker history

- 1. Point to the main **Menu**.
- 2. In the Members submenu, click Manage.
- 3. Find the desired member.
- 4. On the member's Personal page in the Locker section, click History.



The Member Locker History page appears. This page shows all of the lockers that have been assigned to that particular member.

ersonal				Edit Demogra	phics	<u>E</u>
Name:	D	IANE R MARTINEZ		Street:	3838 TRC	DUSER LEG RD
Gender: Date of Birth:	tembe	er Locker History				×
	Membe					
	Club	Location (2)	N	umber	Add Date	Remove Date
Employer: Barcode:	9622	Annex	2	0	03/07/2011 03:54 pm	•
4embership T	9622	Ladies Locker Room	L	101	03/01/2011 03:12 pm	03/07/2011 03:54 pm
Group:						4



# **Running Reports**

You can create custom reports to provide a variety of information. For example, to create a report showing all lockers that are assigned to someone, regardless of whether the locker is expired, broken, or assigned, you can build a report and create a filter for **Member Name is not Blank**.

The following locker fields are available for reporting:

- Locker Description
- Locker Expiration Date
- Locker Location
- Locker Number
- Locker Start Date
- Locker Status
- Locker Type

To create a custom report

- 1. Point to the main **Menu**.
- 2. In the Reports submenu, click Manage.
- 3. On the Manage Reports page, click **Create**.
- 4. On the Edit Report page, type a **Name** for the report.

Edit Report		Club	b: All	Che	ck.
Active				-	
General	General		Select Columns		3
* Name: Description: (1000/1000)	Lockers		Available Address Agreement# Agreement Misc 1 Agreement Misc 2	Selected Member Name (first) Member Status Locker Description	5
Type: Category:	Detail Members	* *	Agreement Misc 3 Agreement Misc 4 Agreement Payment Me Agreement Sale Price	Locker Expiration Date Locker Location Locker Number Locker Start Date	Ì
* Sub-Category: Display Options	Lockers	<b>•</b>	Agt Sales Person (first la Agt Sales Person (last, fi Barcode Birth Date	Locker Type	5

- 5. In the Category list, select Members.
- 6. In the Sub-Category list, select Lockers.
- 7. Select the columns to include in the report.
- 8. Click Next.

The page COLUMN OPTIONS - Step 2 of 4 appears.

9. In the Column Sorting section, select the order in which you want the columns to appear.



#### 10. Click Next.

The page VISIBILITY - Step 3 of 4 appears.

- 11. Select the Clubs that are allowed to run the report.
- 12. Select the security roles that are allowed to run the report.
- 13. Select the users that are allowed to run the report.
- 14. Click Next.

The page FILTER - Step 4 of 4 appears.

- 15. To add a filter
  - o Click Add.
  - o On the Set Filter Values page, set filter criteria.
  - o Click OK.
- 16. Click Finish.

The saved report will be added to the list of reports on the Manage Reports page.

17. Click the report name and then click **Run Report**.

The report will appear on the Manage Report Queue page.

18. When the report appears in the Completed Reports section, click the report name to view or print the report.

The following is an example of a locker report.

		Locker	S		
Member Name	Locker Location	Locker Number	Locker Start Date	Locker Status	Locker Type
Barbara J Burkes	Womens Locker Room	F00103	08/04/2011	Assigned	Large
David M Burkes	Mens Locker Room	M00103	08/04/2011	Assigned	Standard
EVELYN M CHILDRESS	Womens Locker Room	F00101	08/04/2011	Assigned	Large
JOHN ADAMS	Mens Locker Room	M00101	08/04/2011	Assigned	Standard
LATRICIA H BORING	Womens Locker Room	F00102	08/04/2011	Assigned	Large
SCOTT ALLEN	Mens Locker Room	M00102	08/04/2011	Assigned	Standard
	Womens Locker Room	F00104	-	Unassigned	Large
in the second	Womens Locker Room	F00105	And an	Unassigned	Large