# Managing Lockers

November 1, 2011

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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 security roles you can

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


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# 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.

### Table 1: Locker Record Field Descriptions

| Field | Description | Required |
|---|---|---|
| Number | Up to 50 alpha-numeric + space characters | Yes |
| Location | Up to 50 alpha-numeric + space characters<br>This is a configurable list of locker areas such as female, male, or spa. | Yes |
| Type | Up to 50 alpha-numeric + space characters<br>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. | Yes |
| 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<br>This field only appears on the locker management page and report (not on the member page). | No |
| Original Start Date | MM/DD/YYYY date format and field<br>This is the date the member will start to use the locker. | No |
| Current Start Date | MM/DD/YYYY date format and field<br>This is the date the member will start to use the locker or the renewal date. | No |


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| Field | Description | Required |
|---|---|---|
| Expire Date | MM/DD/YYYY date format and field<br>This is the date that the member will stop using the locker unless the member makes further arrangements.<br>If left blank and assigned to a member, the locker is assigned to the member indefinitely.<br>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. | No |

# 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:

- Activating lockers
- 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
   - Set Manage Lockers to **Yes**.


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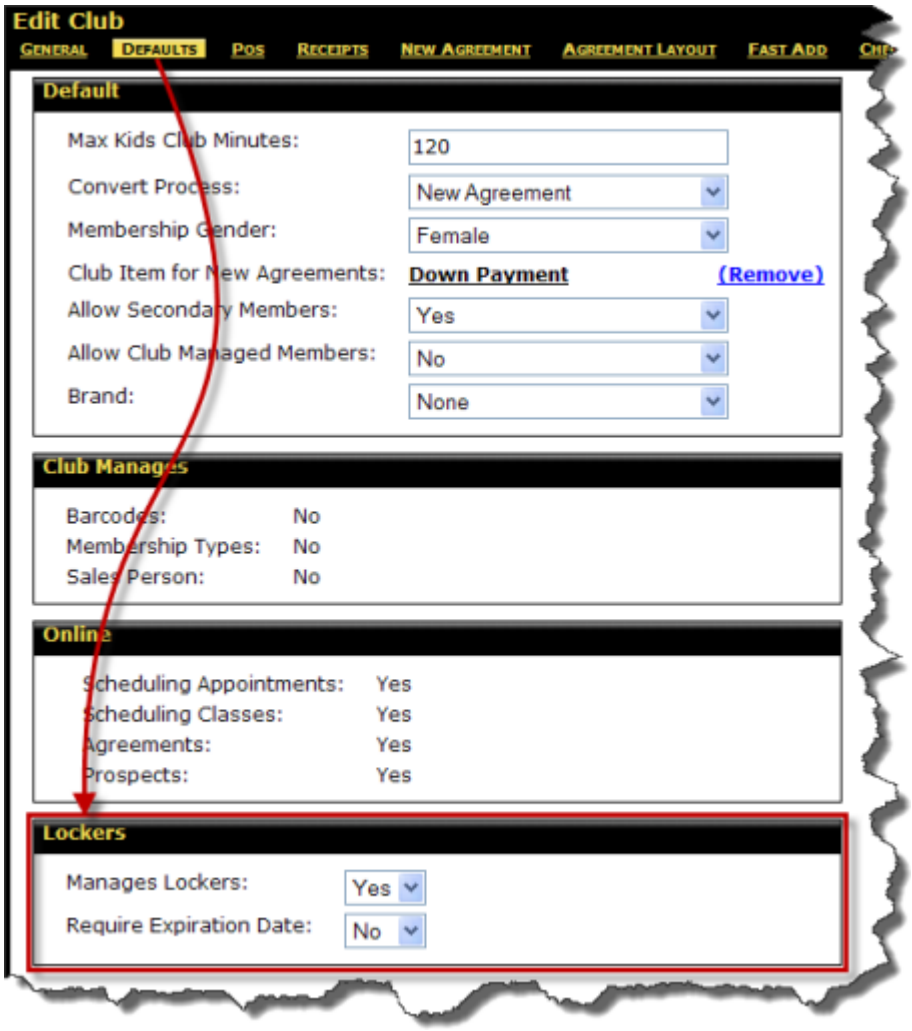
- To require a locker expiration date, set Require Expiration Date to **Yes**.




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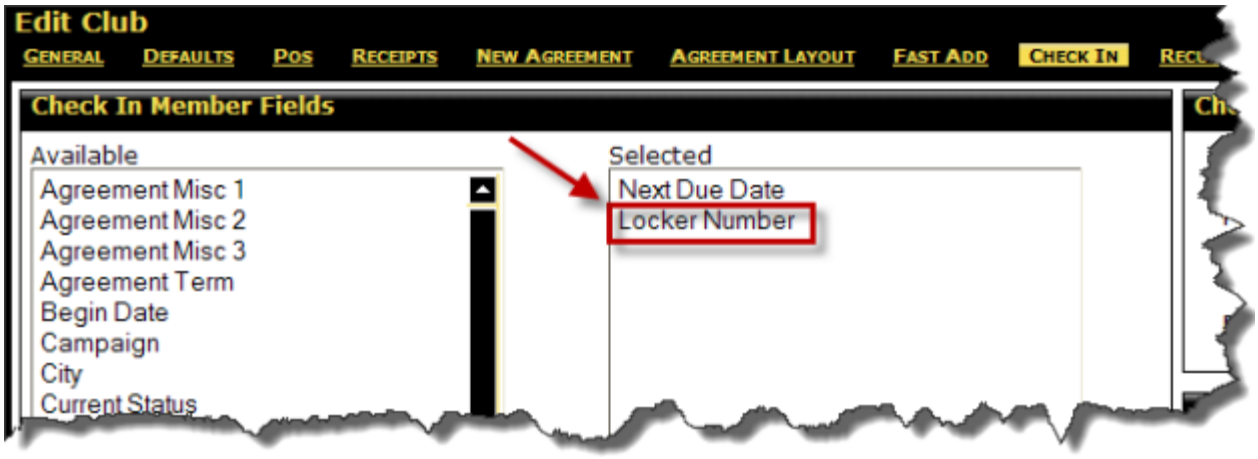
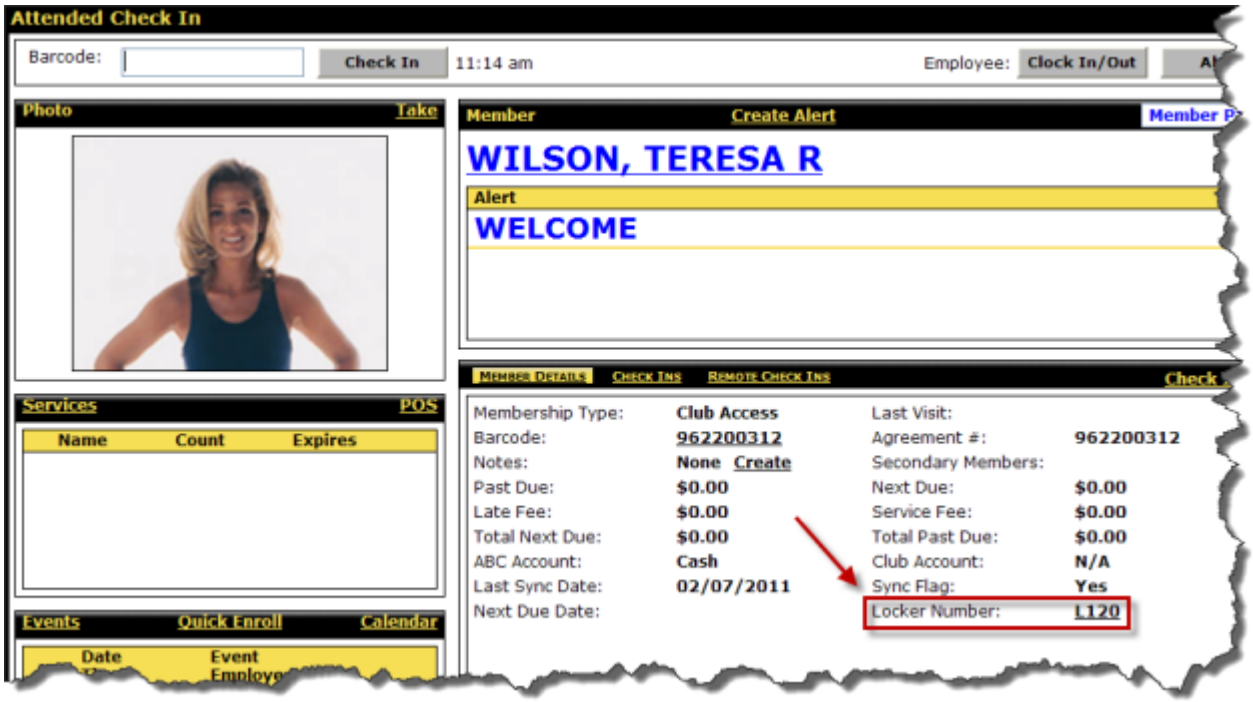
5. In the Check In Member Fields section select the **Locker Number** field in the Available column and move it to the Selected column.




6. Click **Save**.

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





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# 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.

### Table 2: Locker Security Roles

| 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. |

*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**.


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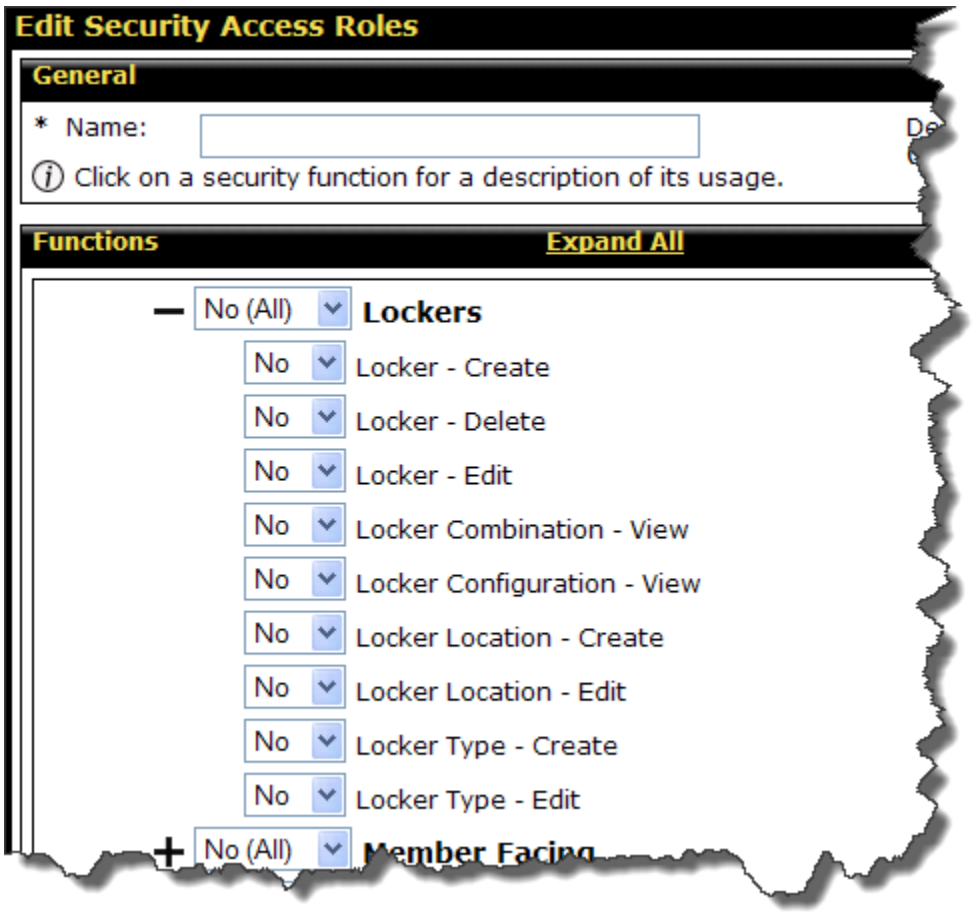
The following is an example of the Lockers security roles.




# 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 "Setting Security Roles.")

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.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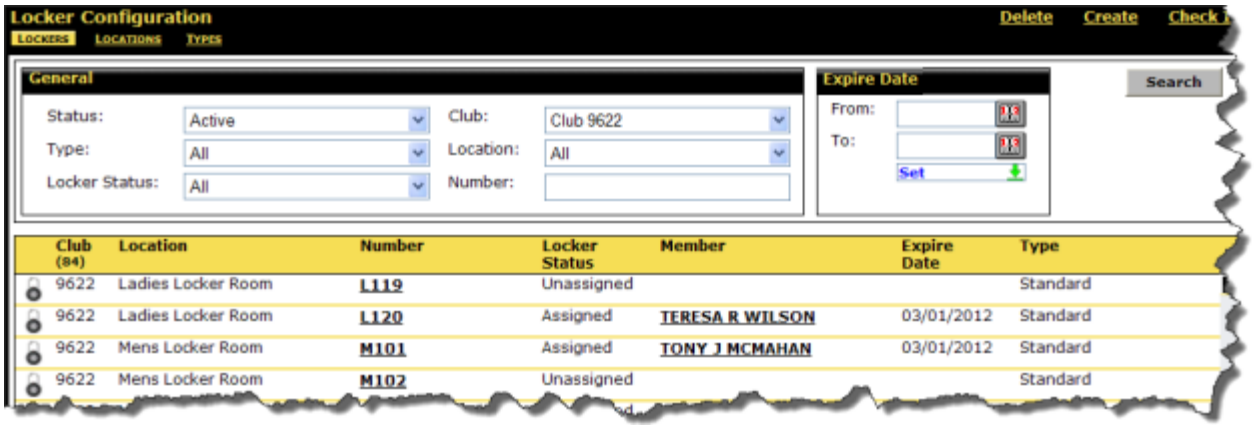
- Click the link in the Member column to go to that member's page.

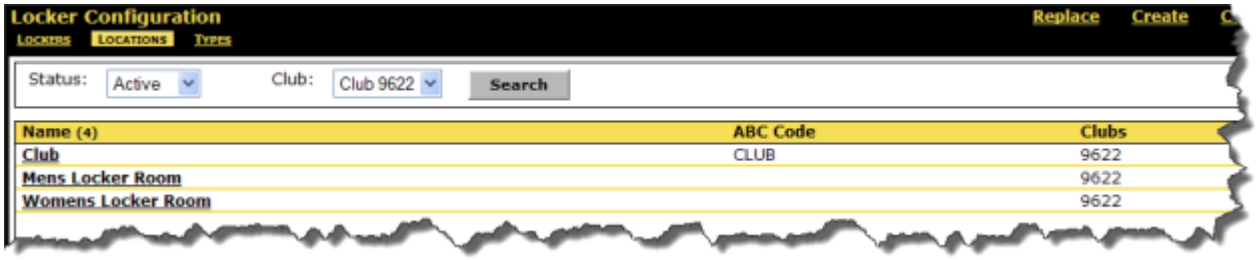
The following is an example of the Locker Configuration page.




# 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.




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

- Creating locker locations
- Replacing locker locations

## Creating Locker Locations

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

*To create a locker location*

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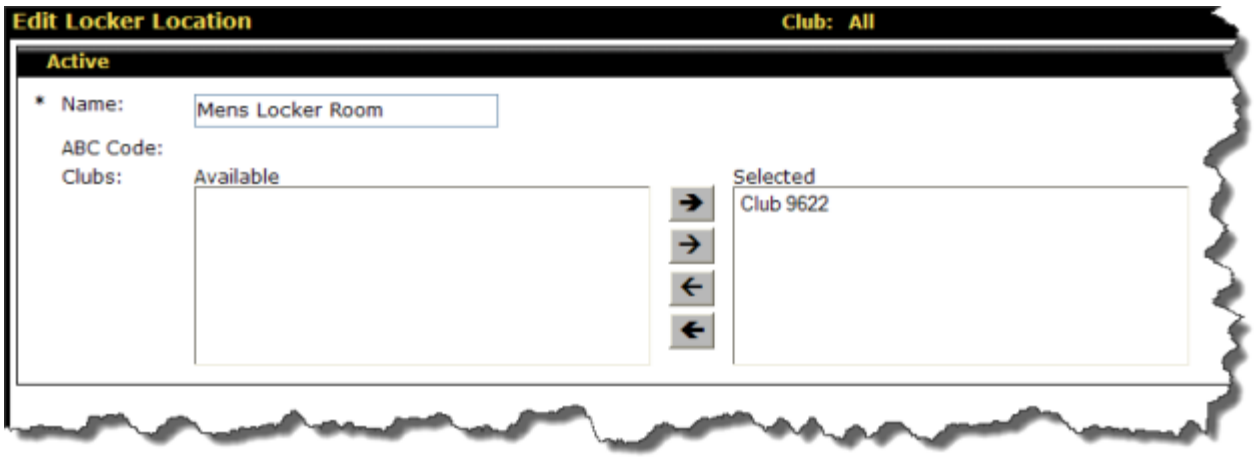
3. On the Locker Configuration page, click the **Locations** tab.
4. Click **Create**.

   The Edit Locker Location page appears.




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**.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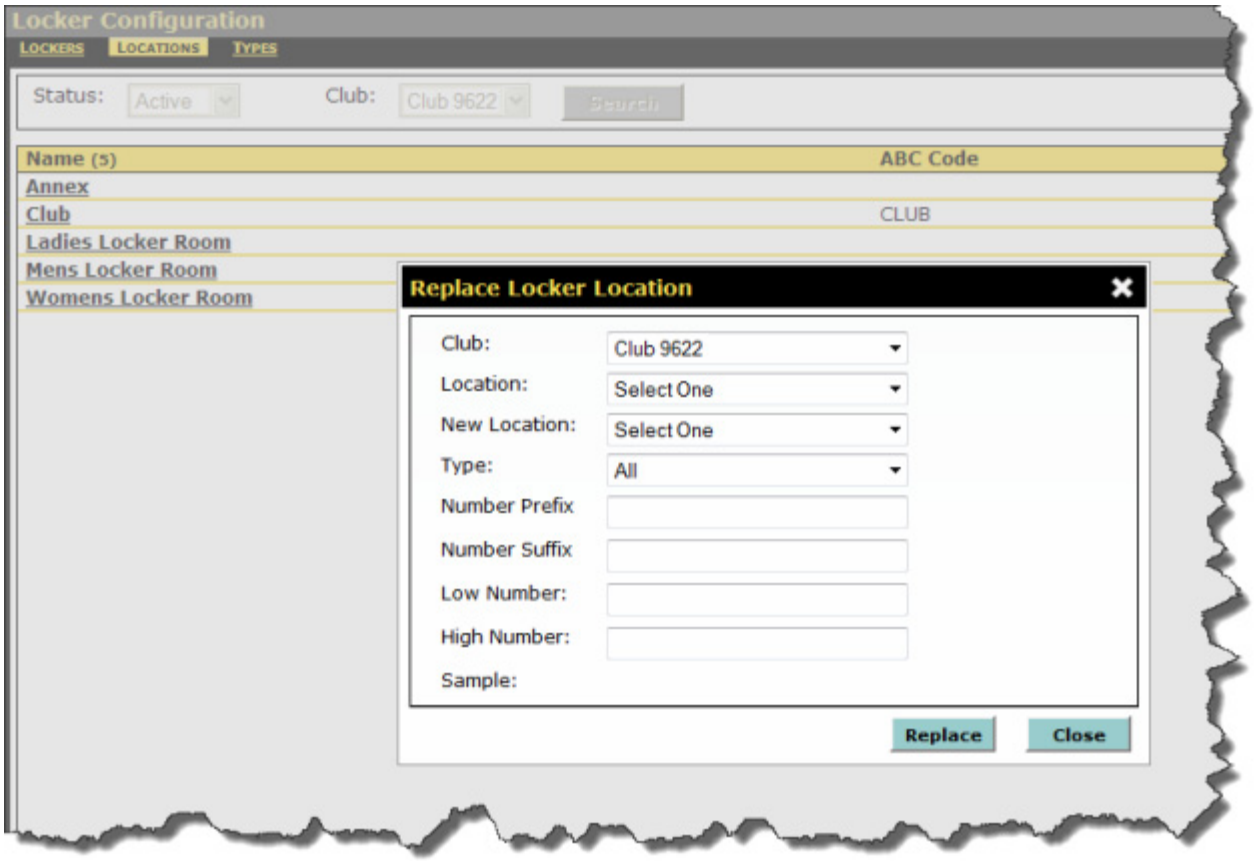
The Replace Locker Location dialog box appears.




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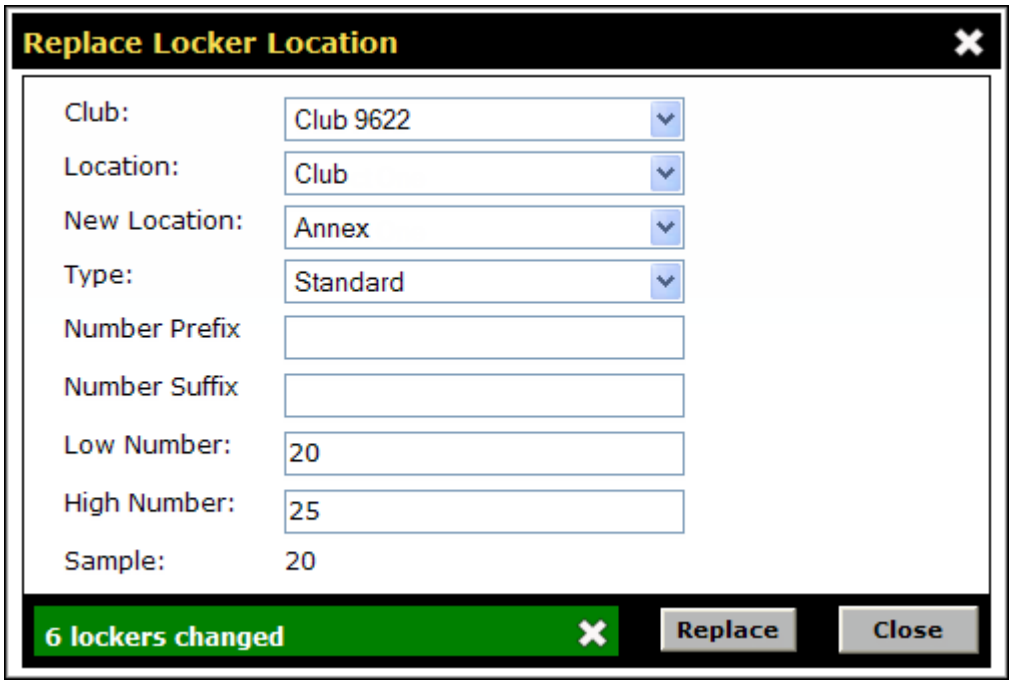
A confirmation message will appear indicating that the change was made.




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.

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

- Creating locker types
- Replacing locker types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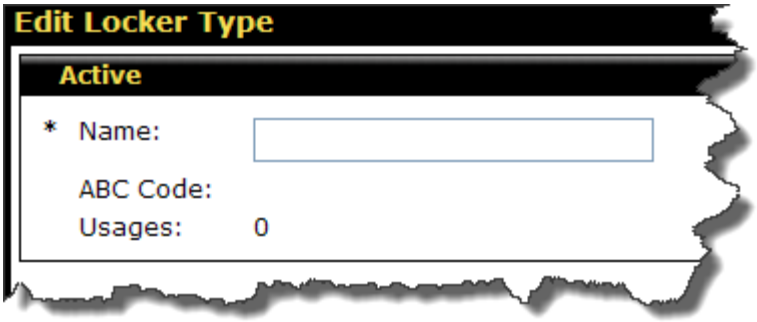
## Creating Locker Types

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.




5. Type a **Name** (required).
6. Click **Save**.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## Replacing Locker Types

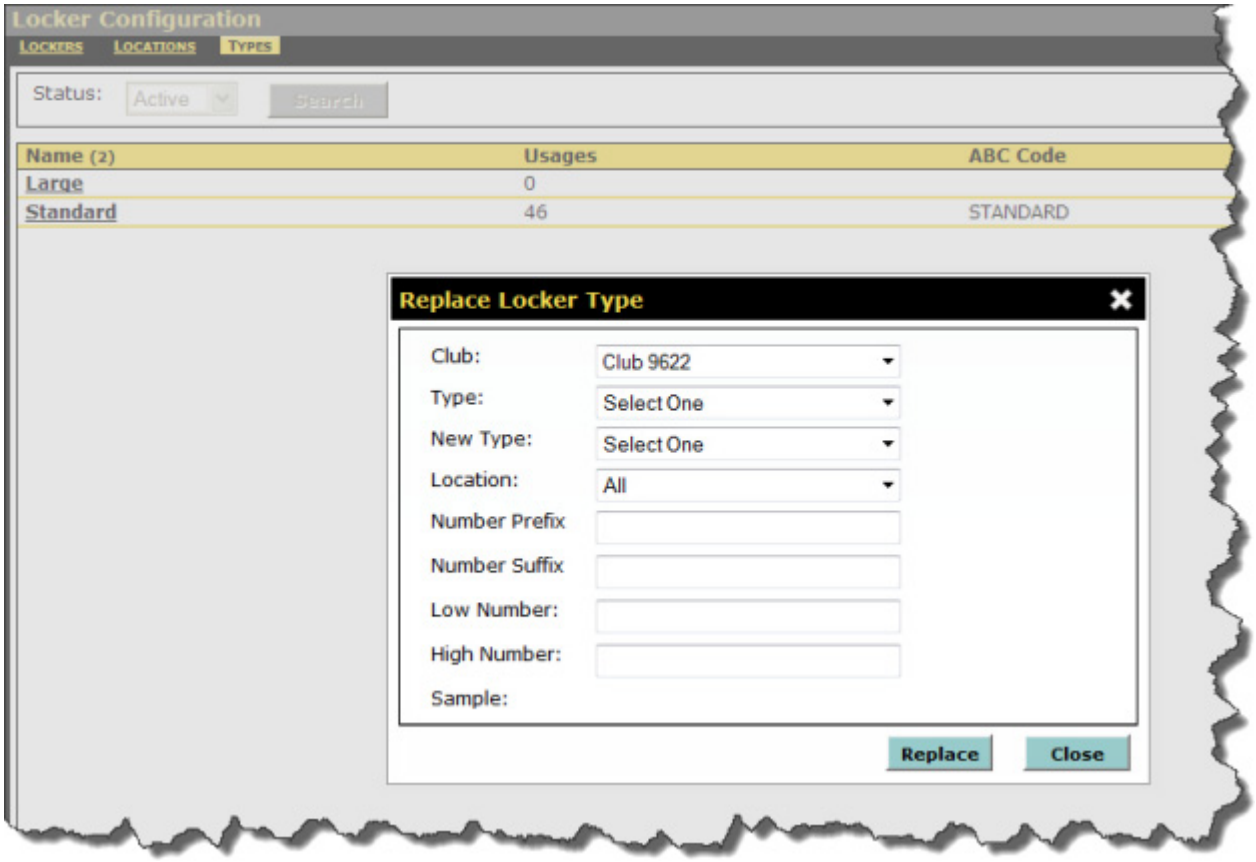
If your locker types change, you can replace the type assigned to particular lockers.

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.




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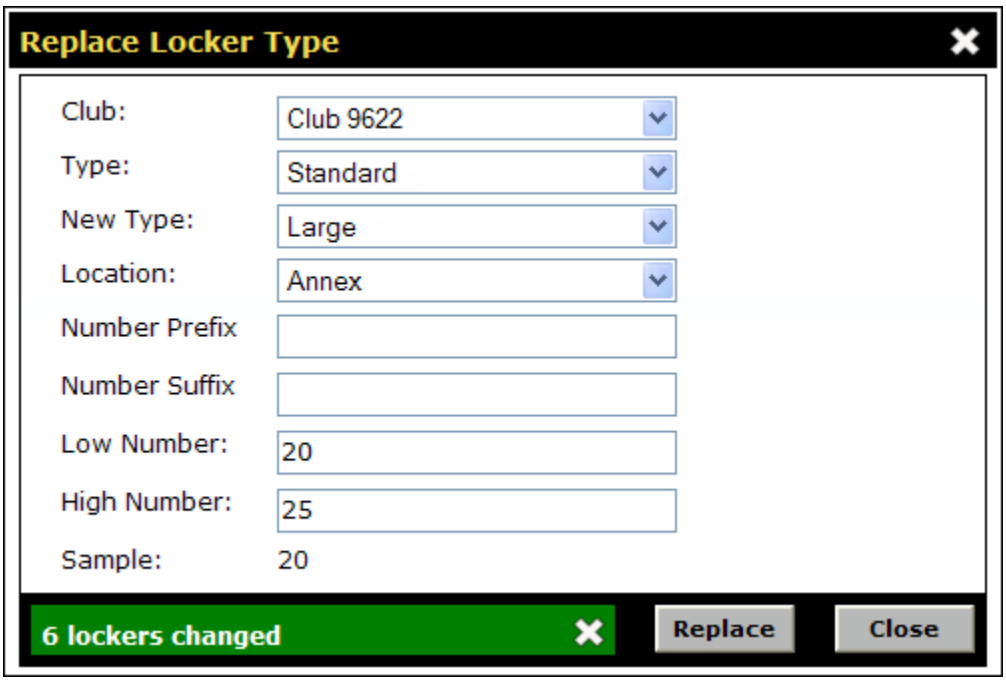
10. Type the **Low Number**.
11. Type the **High Number**.
12. Click **Replace**.

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




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:

- Creating a single locker
- Creating multiple lockers
- Editing lockers
- Viewing locker history
- Deleting lockers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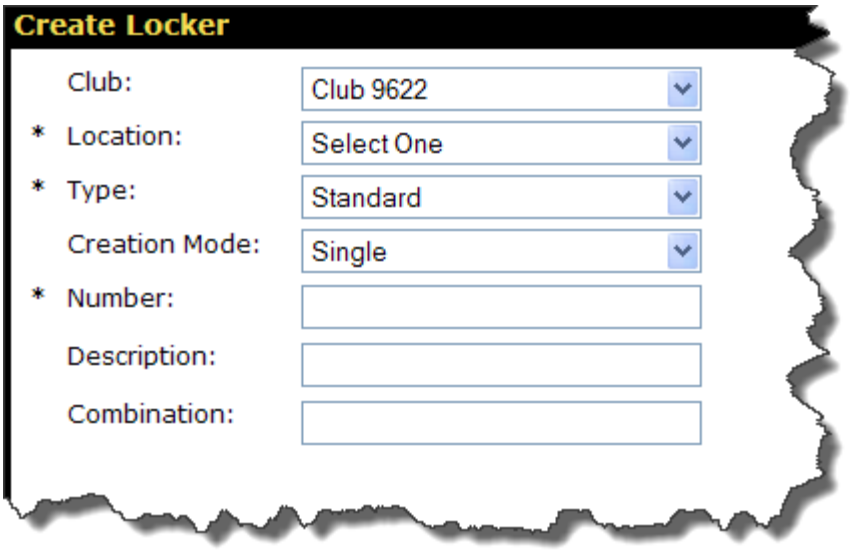
## Creating a Single Locker

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.




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

   Only the active locker locations are available in the list.
6. 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**.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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 "Locker Record.")

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).


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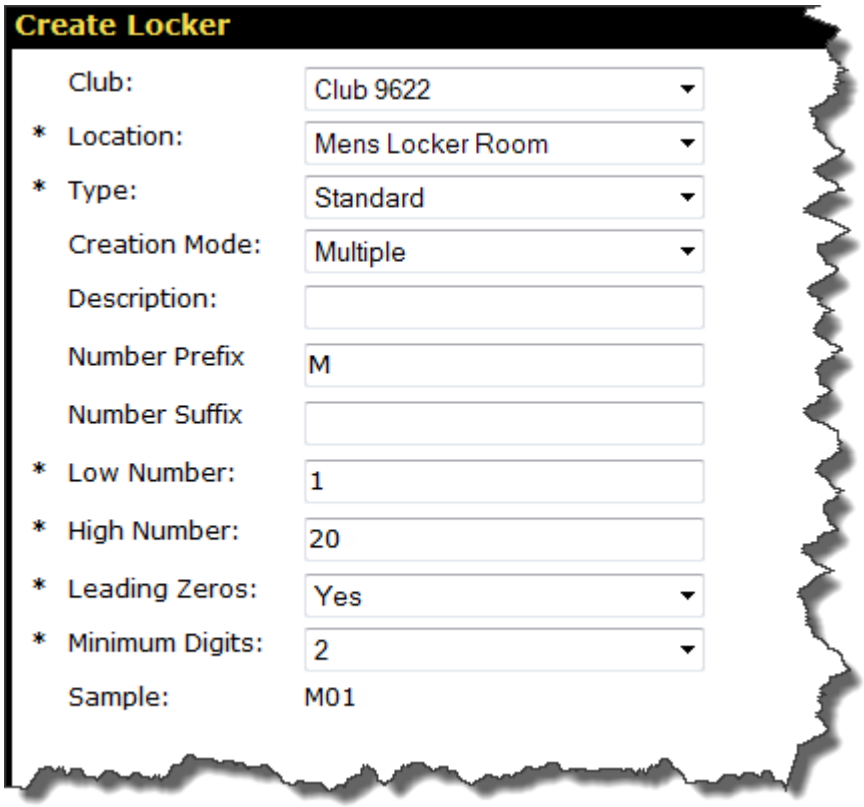
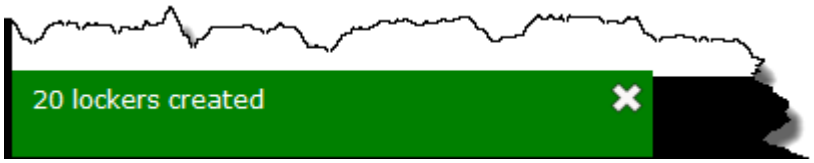
The following is an example of the completed page.




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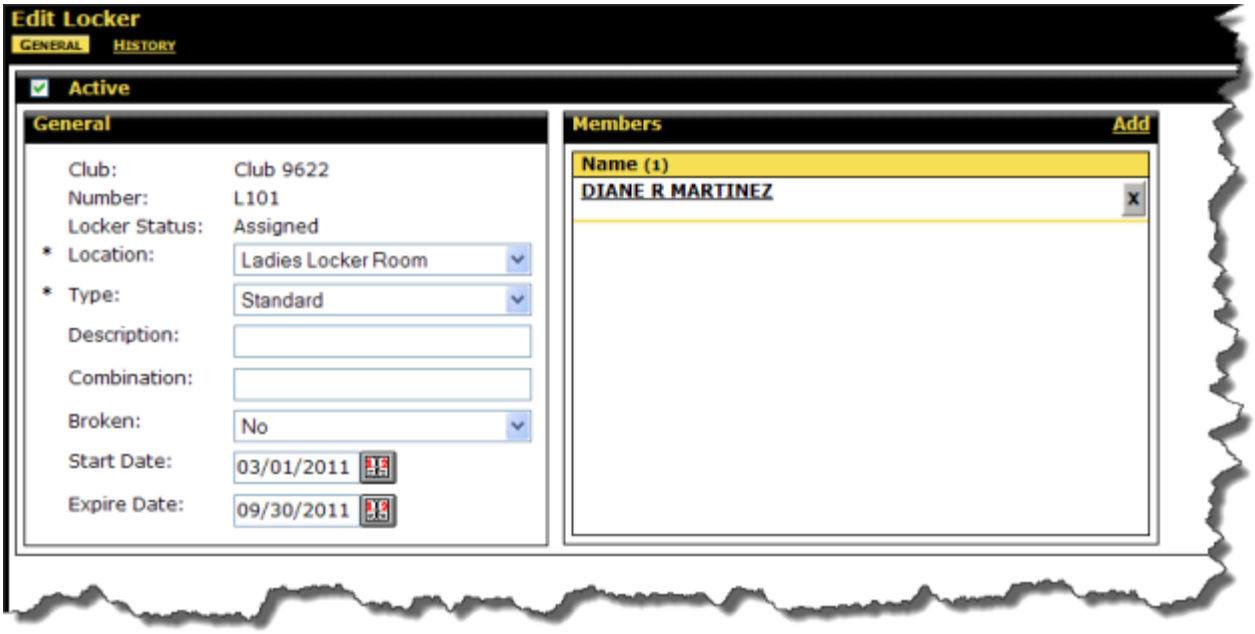
3. On the Locker Configuration page, click the desired locker number link in the **Number** column.

   The Edit Locker page appears.




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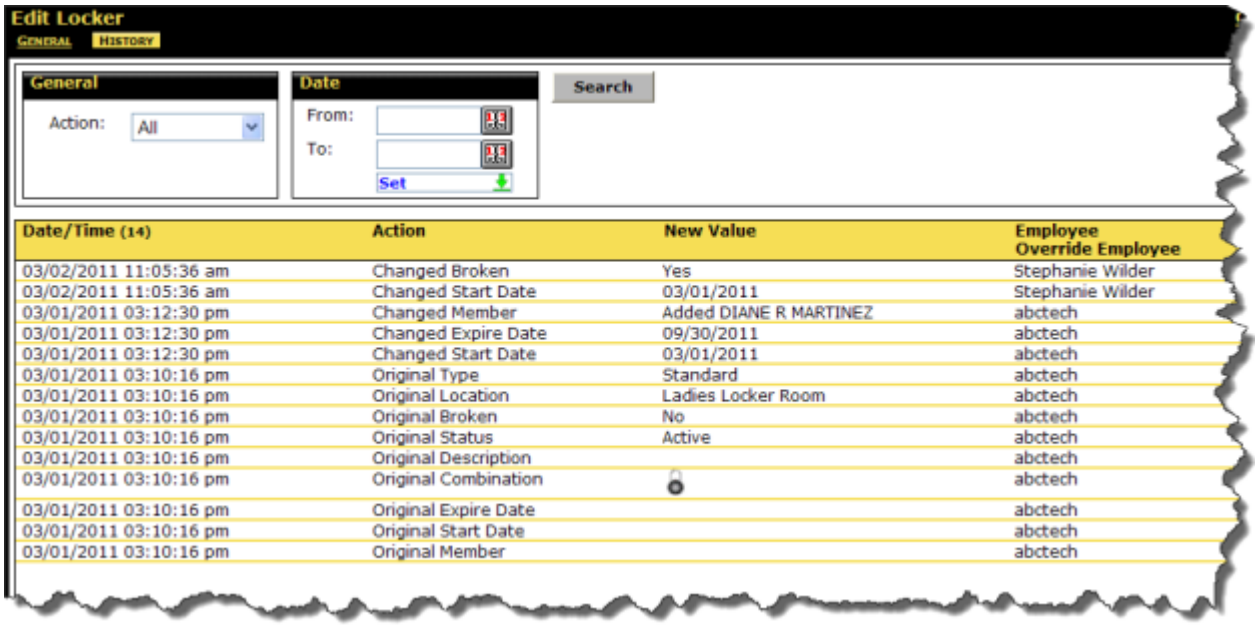
## Viewing Locker History

*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.




| Date/Time (14) | Action | New Value | Employee<br>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 | | 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**.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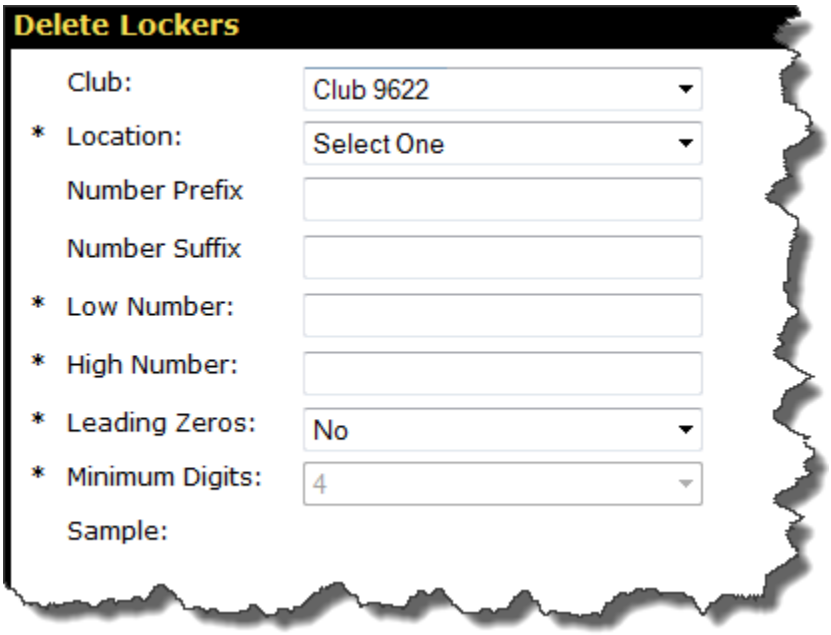
3. On the Locker Configuration page, click **Delete**.

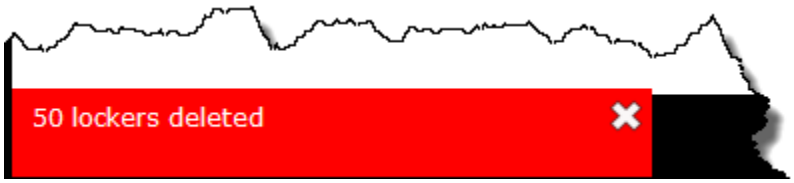
   The Delete Lockers page appears.




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**.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# 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

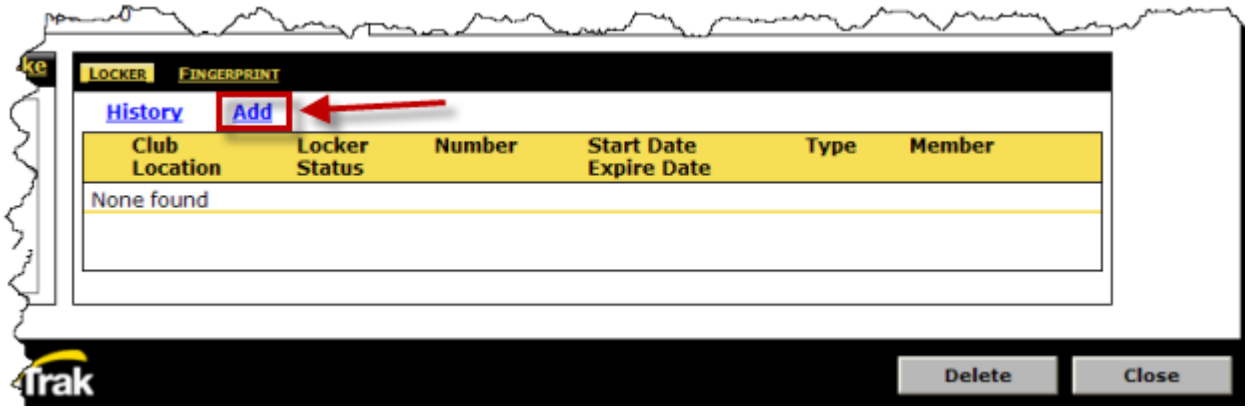
- Add a locker
- Release or change a member's locker
- View a member's locker history

## 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 Edit Locker 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**.





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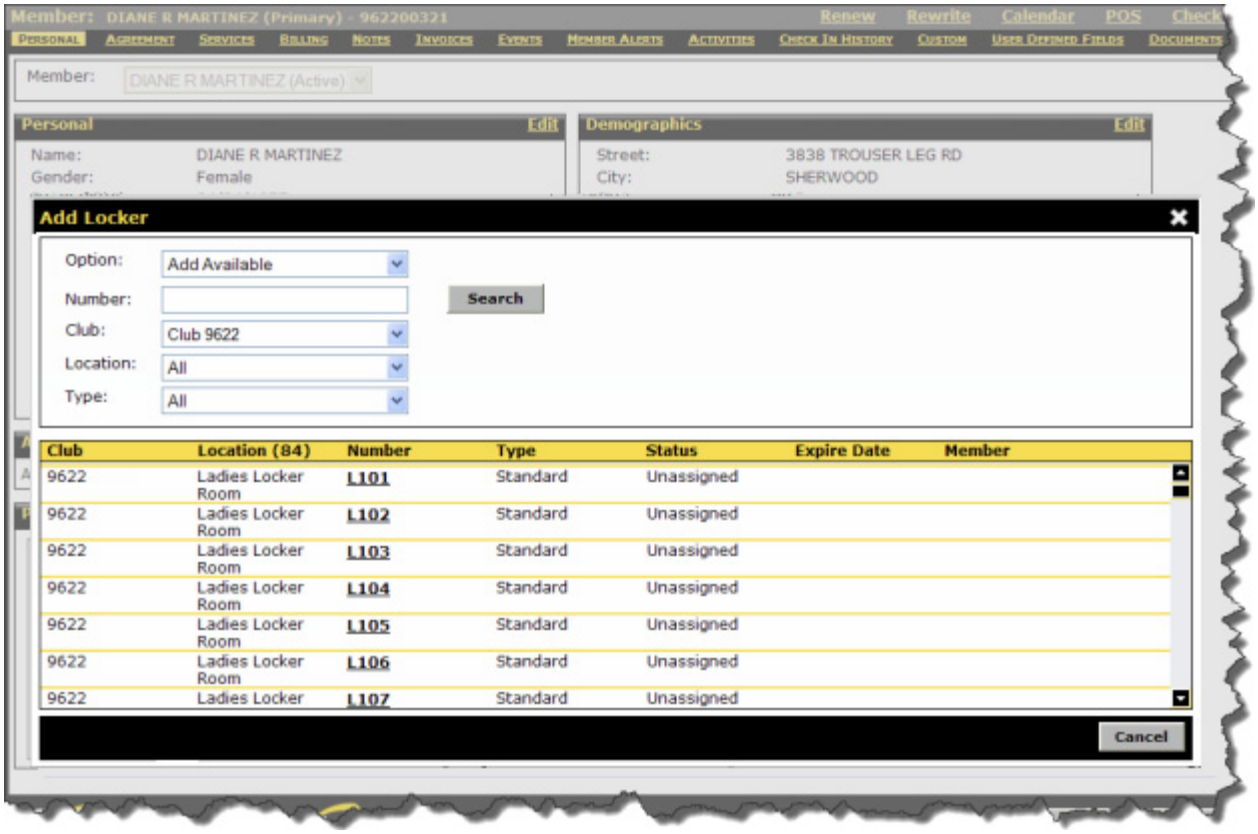
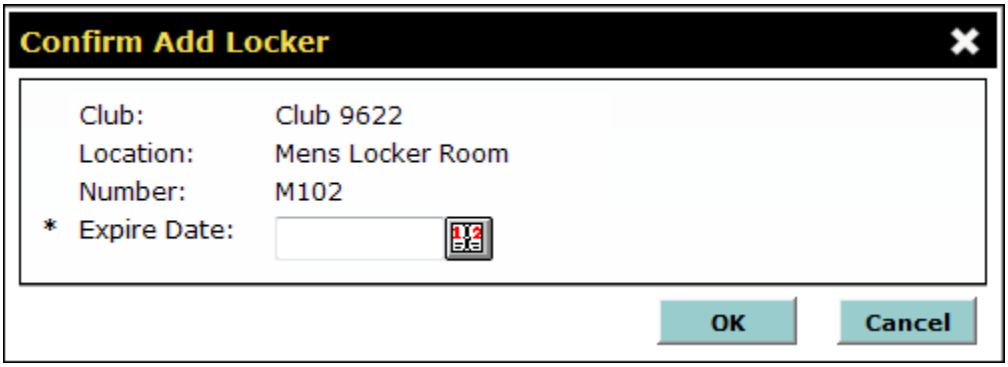
The Add Locker page appears.




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.




7. Enter an **Expire Date** if appropriate.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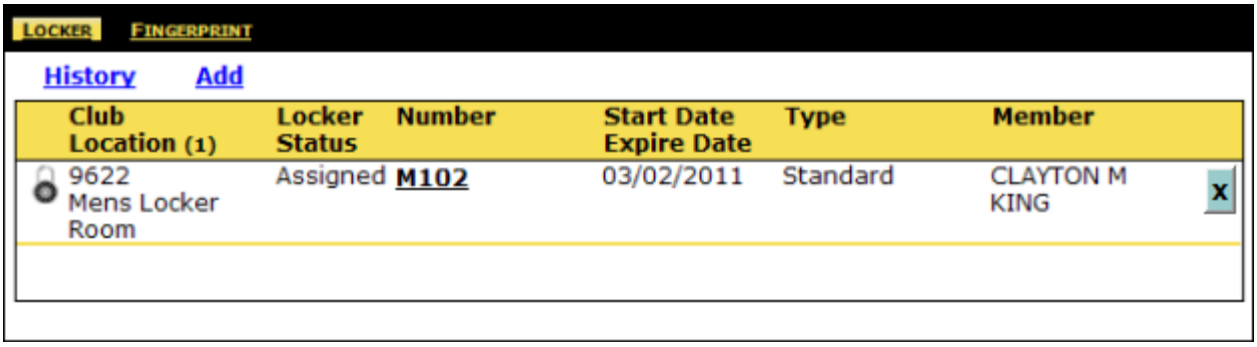
8. Click **OK**.

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




# Releasing or Changing a Member's Locker

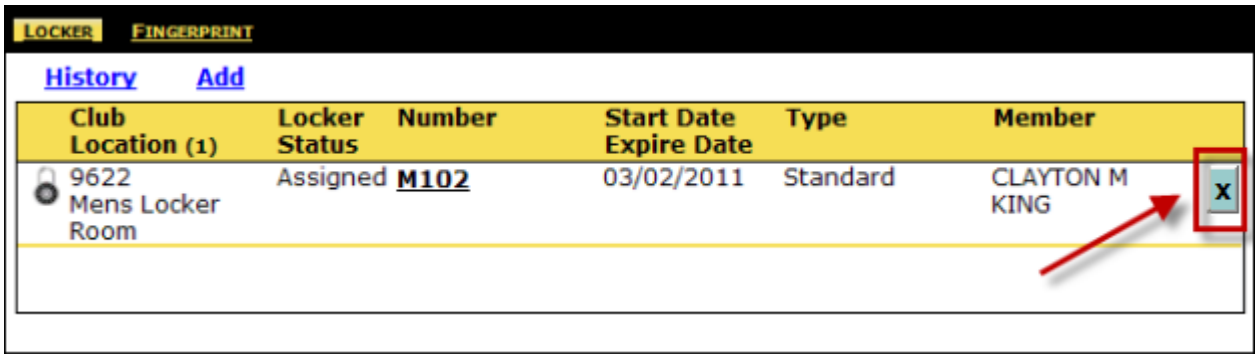
You can easily release or change lockers for members in the manage member section.

**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.




*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.
   - 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.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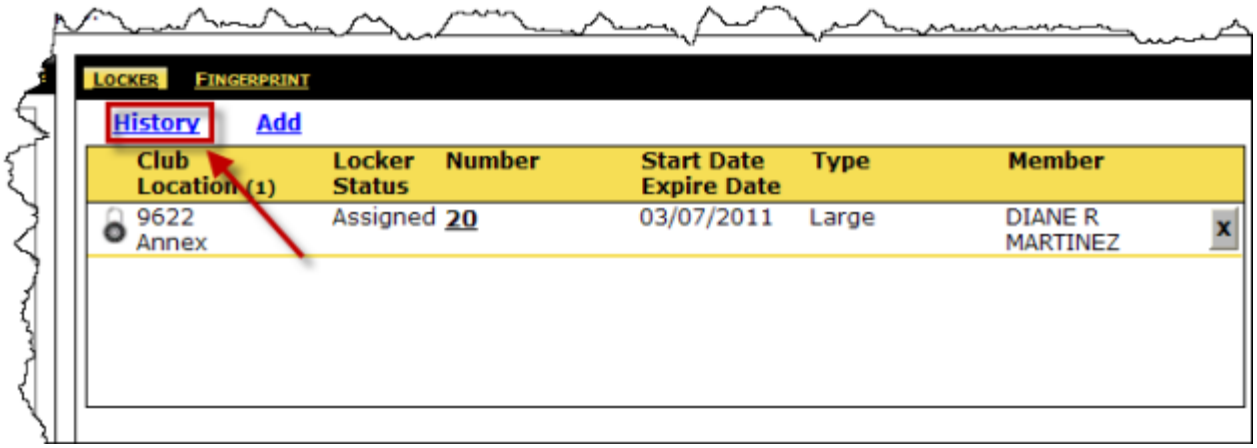
# Viewing a Member's Locker History

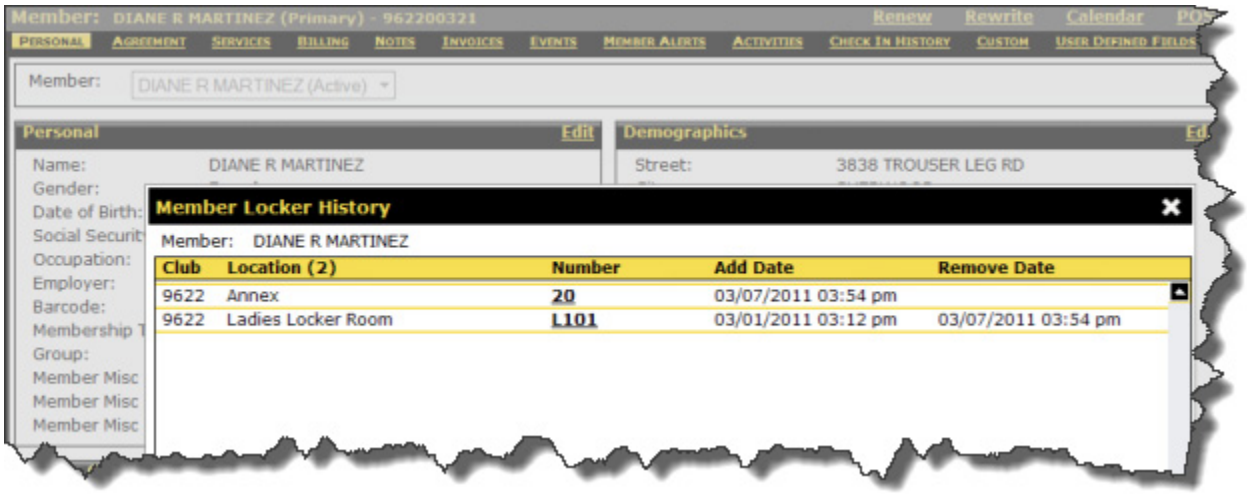
In addition to viewing the history for a particular locker, you can view a member's locker history.

*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.





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# Running Reports

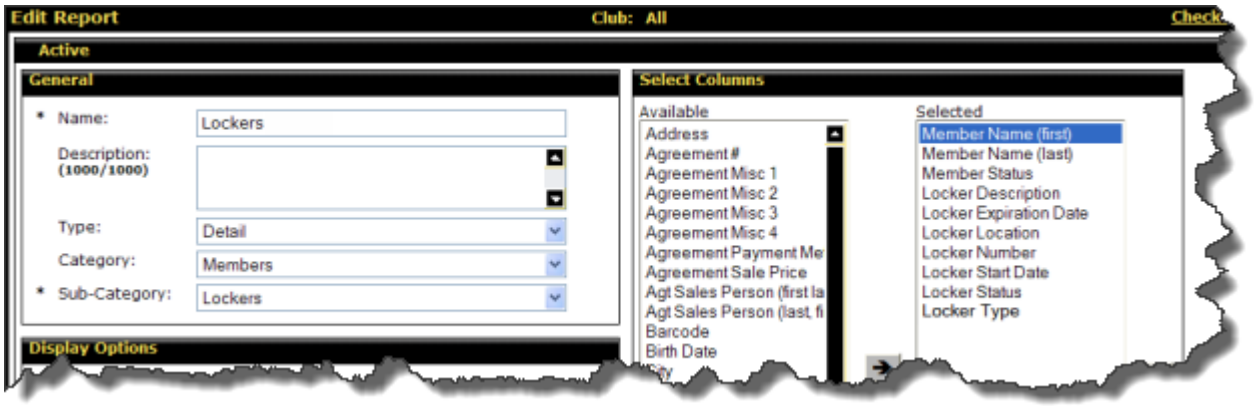
You can create custom reports to provide a variety of information. For example, to create a report showing all lockers that are assigned to someone, regardless of whether the locker is expired, broken, or assigned, you can build a report and create a filter for **Member Name is not Blank**.

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.




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.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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
    - Click **Add**.
    - On the Set Filter Values page, set filter criteria.
    - 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.

Lockers

| 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 |
| - | Womens Locker Room | F00105 | | Unassigned | Large |


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