

# Managing Scheduling Associations

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January 17, 2012

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## About Scheduling Associations

Scheduling associations link together a member, an employee, and an event. This association makes it possible for members to schedule personal training through MYiCLUBonline without having to involve club staff.

You can create three types of associations:

- [Default Event Associations](#)
- [Employee Associations](#)
- [Member Associations](#)

Default event associations allow members scheduling training through MYiCLUBonline to select an employee associated with an event if no associations have been created yet for that member. If employee-member associations exist, then when members schedule events through MYiCLUBonline they can select those events and employees within their association.

For example, if member Jane Doe is associated with employees Bob Smith and Jim Jones for the event PT30, Jane can then schedule a personal training session through MYiCLUBonline with either Bob or Jim.

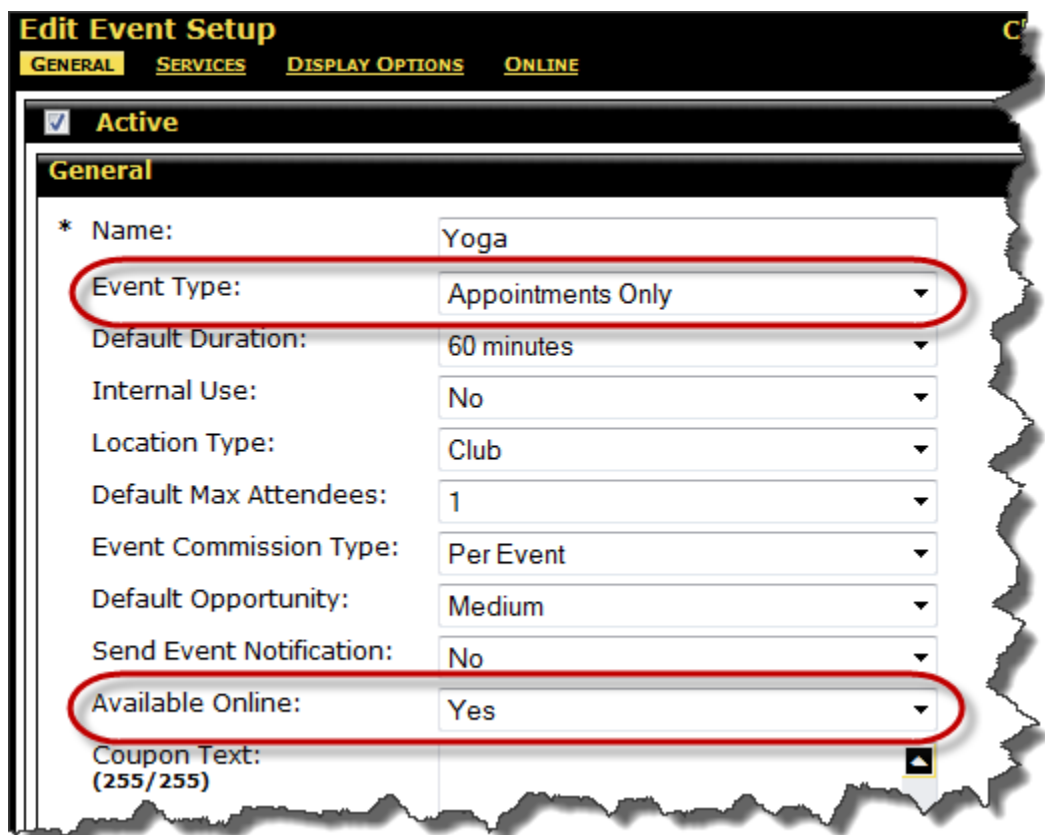
This document provides step-by-step instructions for creating event, employee, and member associations.

**Note:** You must have the appropriate [security roles](#) to create these associations.

## Default Event Associations

Default event associations allow you to associate employees to clubs, events, and levels so that if a member does not yet have associations set up with specific employees and events, that new member can select from the default employees when scheduling an event through MYiCLUBonline.

**Note:** You can only associate events that are in the Appointment category and that have the Available Online flag set to yes. For example, the image below of the Edit Event Setup page for the Yoga event shows that these options are selected.



**Edit Event Setup**

**GENERAL SERVICES DISPLAY OPTIONS ONLINE**

**Active**

**General**

\* Name: Yoga

Event Type: Appointments Only

Default Duration: 60 minutes

Internal Use: No

Location Type: Club

Default Max Attendees: 1

Event Commission Type: Per Event

Default Opportunity: Medium

Send Event Notification: No

Available Online: Yes

Coupon Text: (255/255)

You can create an unlimited number of default event associations.

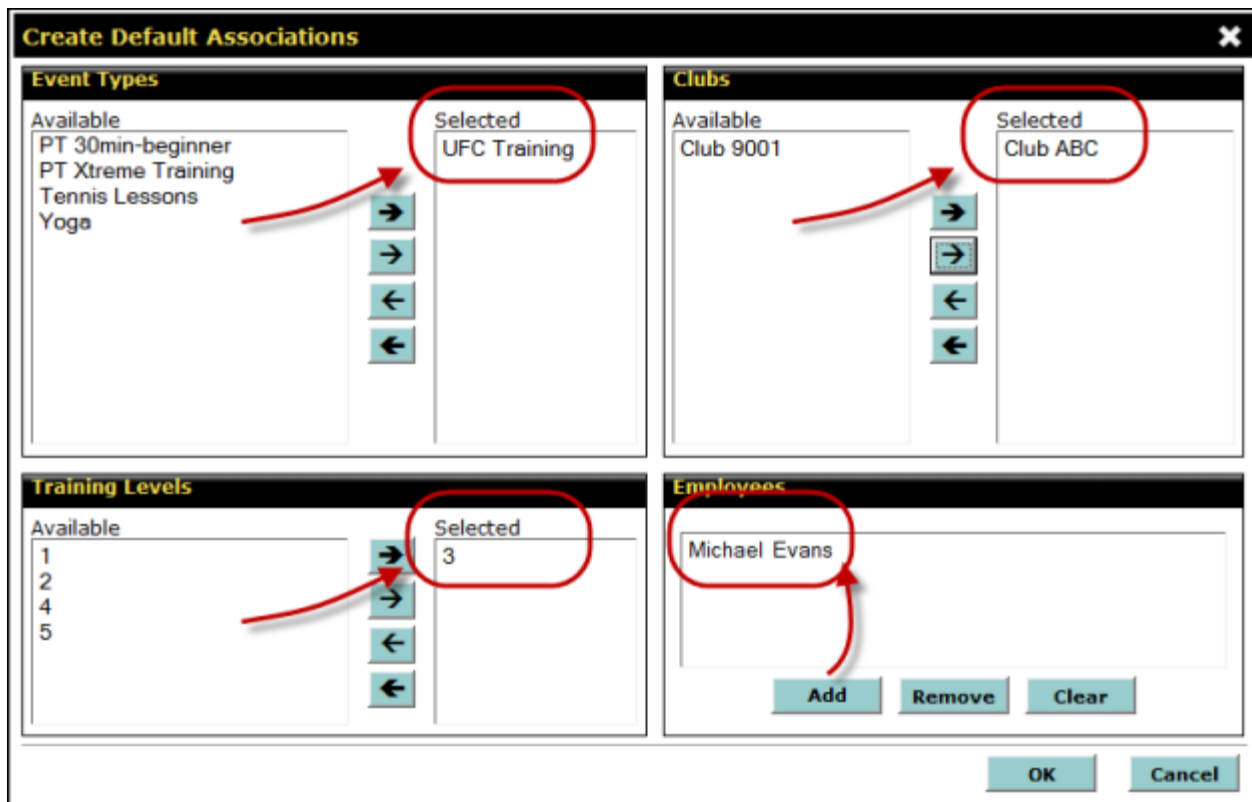
*To set up a default event association*

1. Click **Setup**.
2. In the Schedule Setup submenu, click **Default Associations**.
3. On the Manage Default Event Associations page, click **Create**.
4. On the Create Default Associations page
  - o Select the **Event Type**.

As mentioned in the note above, this list only displays events that are categorized as appointments and that are available online.

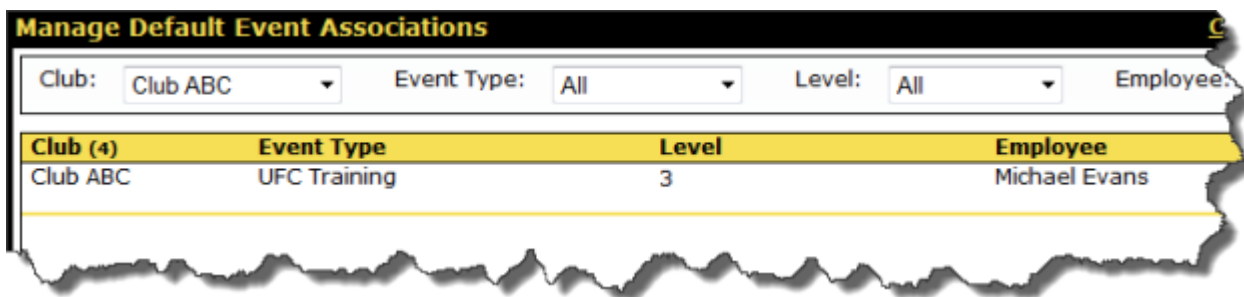
- o Select the **Club**.
- o Select the **Training Level**.
- o Select the **Employee**.

These selections are illustrated in the image below.



5. Click **OK**.

The default event association is displayed on the Manage Default Event Associations page. If the page lists multiple event associations, you can filter the view by Club, Event Type, Level, or Employee.



## Employee Associations

On the employee's Events page you can create associations between the employee, an event, and a member. You can also print the employee's associations or remove associations if necessary.

This section explains how to

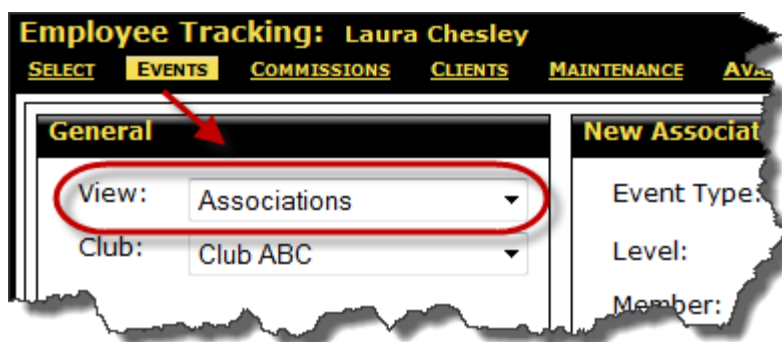
- [Create employee associations](#)
- [Print employee associations](#)
- [Remove employee associations](#)

## Create Employee Associations

You can create an unlimited number of employee associations.

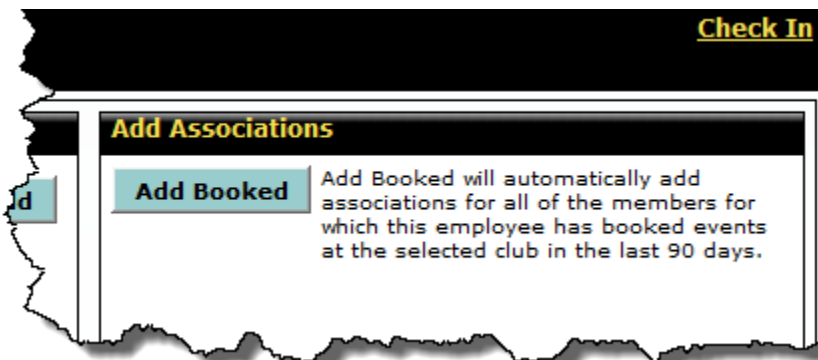
*To create employee associations*

1. Point to the main **Menu** and then in the Schedule submenu click **Employee Tracking**.
2. On the Employee Tracking page, select the desired employee.  
 The logged in employee is selected by default.
3. Click the **Events** tab.
4. In the General section
  - o Select **Associations** from the View list.



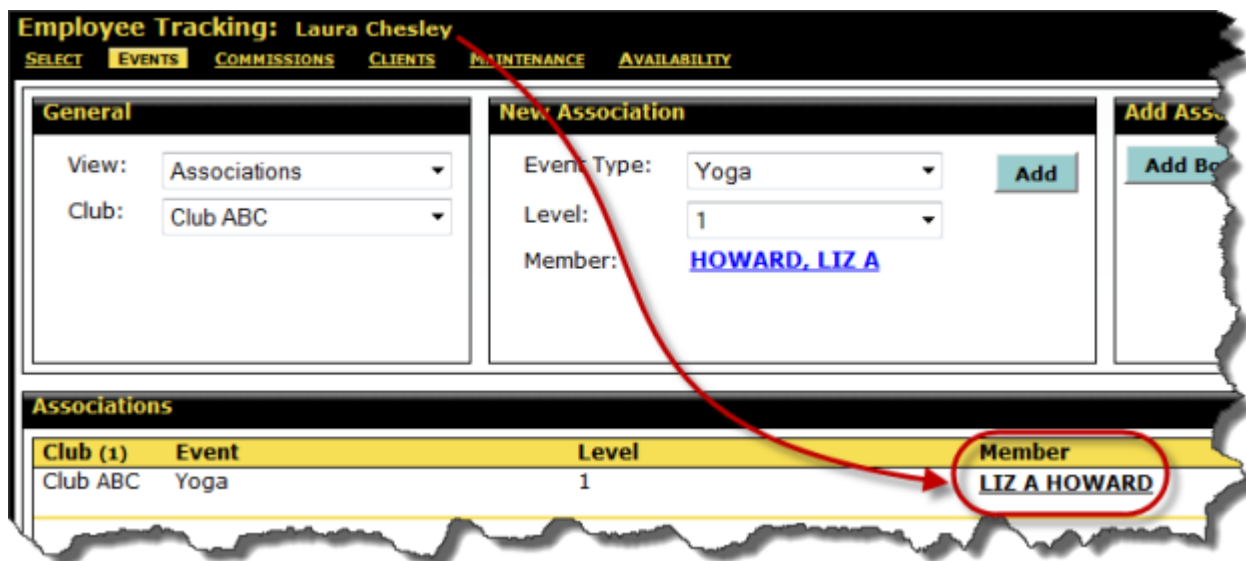
- o Select the **Club**.  
 You must select a club to create or add an association.
5. To create a new association
    - o In the New Association section select an **Event Type**.  
 This list only displays events that are categorized as appointments and that are available online. For more information, see [Default Event Associations](#).
    - o Select the event **Level**.
    - o Select the **Member**.
    - o Click **Add**.

6. To add an existing association, click **Add Booked** in the Add Associations section.



This option automatically adds associations between this employee and all members for which this employee has booked events at the selected club in the last 90 days.

The associations you create or add appear in the Associations section on the employee's Events page as illustrated in the image below.



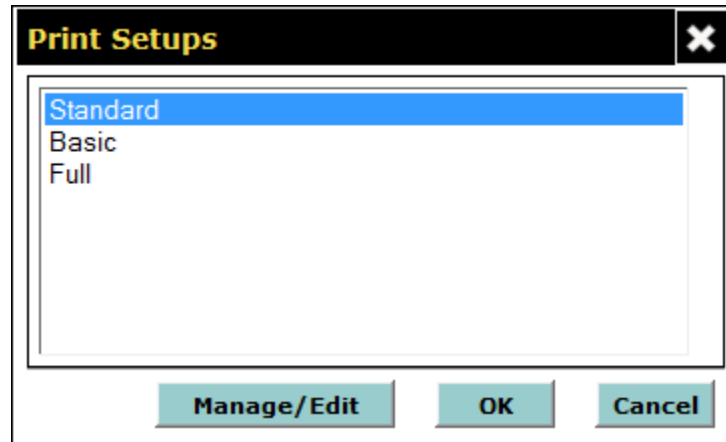
## Print Employee Associations

You can print the employee's associations.

*To print the employee's associations*

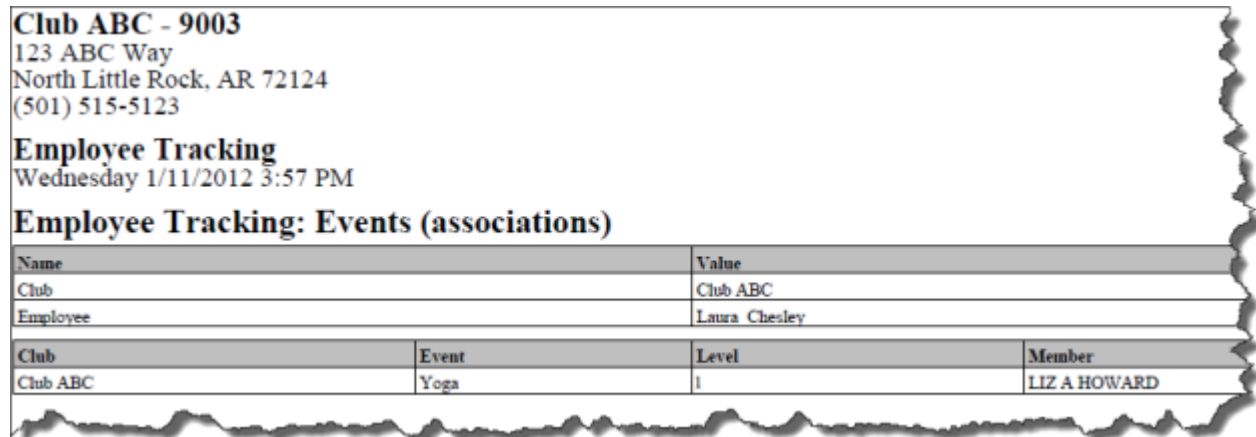
1. Click **Print** at the bottom of the employee's Events page.

The Print Setups dialog box appears.



2. Click **OK** to use the Standard setup or select a different setup option if available.

A PDF appears as shown in the example below:




3. Print the PDF.

## Remove Employee Associations

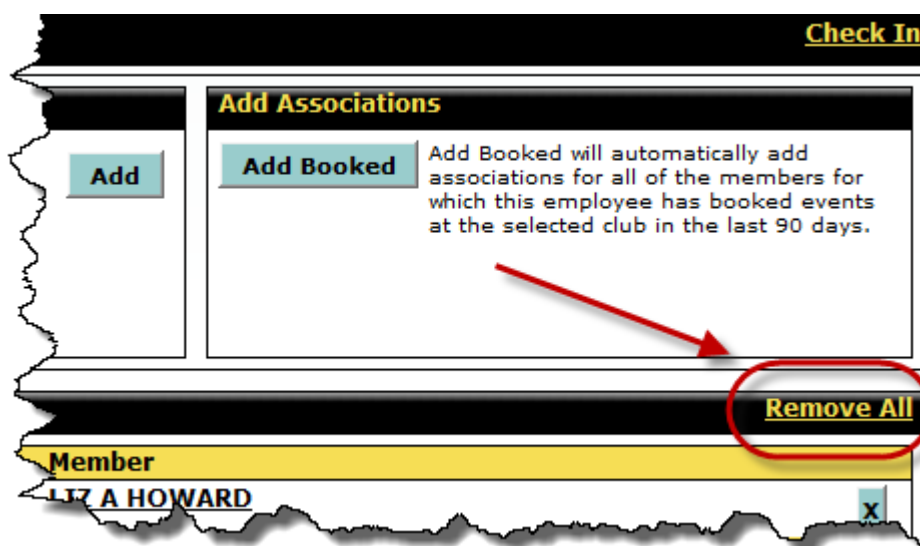
If necessary you can remove one or more employee associations

*To remove a single association*

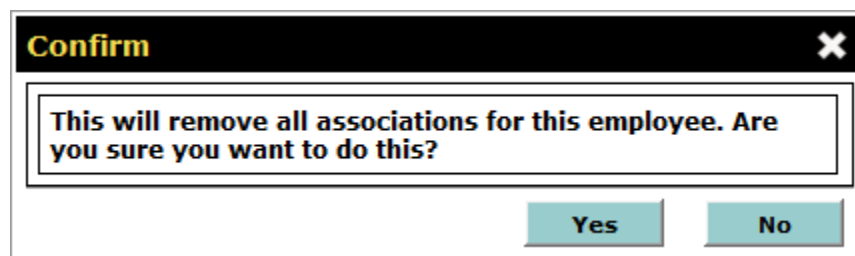
1. In the Associations list, find the desired association.
2. Click the delete button .  
This only removes the single association.

*To remove all associations*

1. Click **Remove All**.



2. When the Confirm dialog box appears, click **Yes**.



All associations are removed.

## Member Associations

On the member's Events page you can create associations between the member, an event, and an employee. You can also print member associations or remove associations if necessary.

This section explains how to

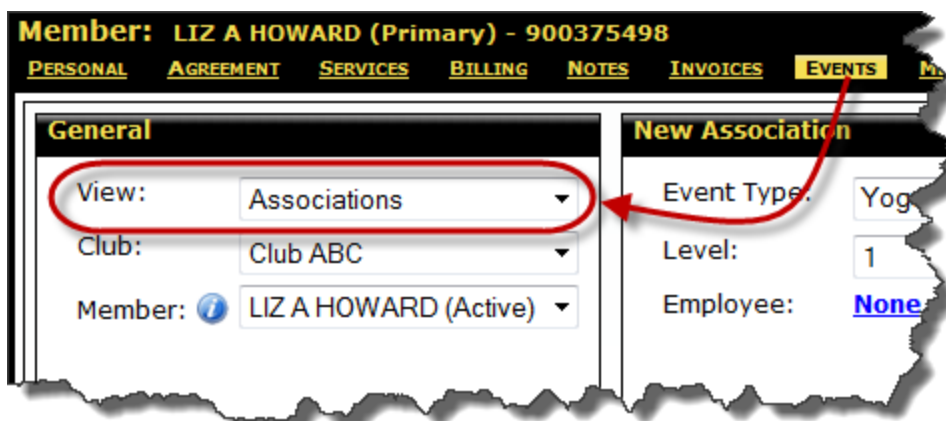
- [Create member associations](#)
- [Print member associations](#)
- [Remove member associations](#)

## Create Member Associations

You can create an unlimited number of member associations.

*To create member associations*

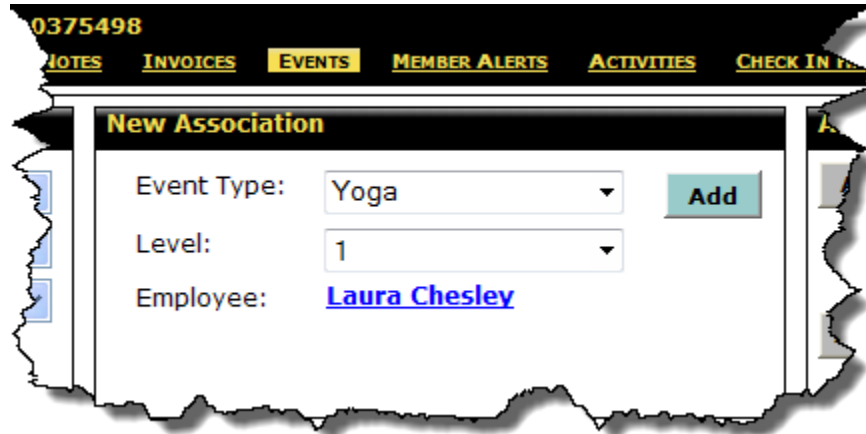
1. On the members page, click the **Events** tab.
2. In the General section
  - o Select **Associations** from the View list.



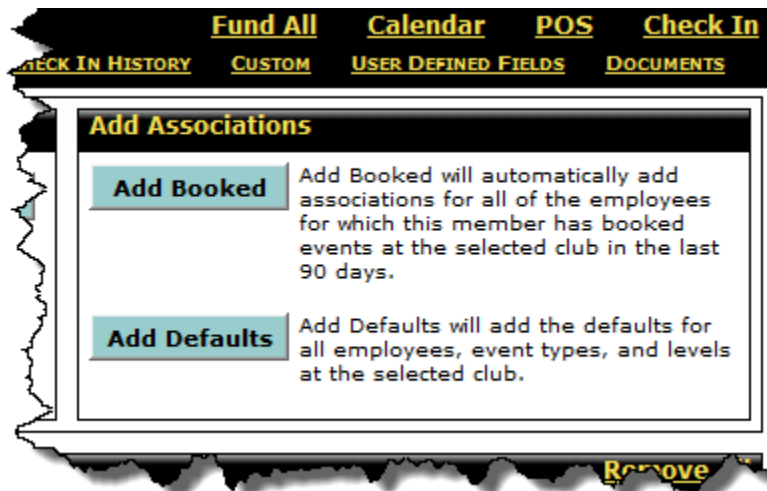
- o Select a **Club**.  
 You must select a club to create or add an association.
- o Select the **Member**.  
 If the agreement does not have secondary members, the primary member is the only option.
3. To create a new association
  - o In the New Association section select the **Event Type**.  
 This list only displays events that are categorized as appointments and that are available online. For more information, see [Default Event Associations](#).
  - o Select the event **Level**.



- o Select the **Employee**.  
 The employee's level must meet the minimum level required per the level selected above.
- o Click **Add**.



4. To add existing associations, select the appropriate option in the Add Associations section:



- o **Add Booked** – Automatically adds associations between a member and all employees that the member has booked events with in the last 90 days.
- o **Add Defaults** – Automatically adds associations default employees, events, and levels at the selected club.

The associations you create or add appear in the Associations section on the members Events page.

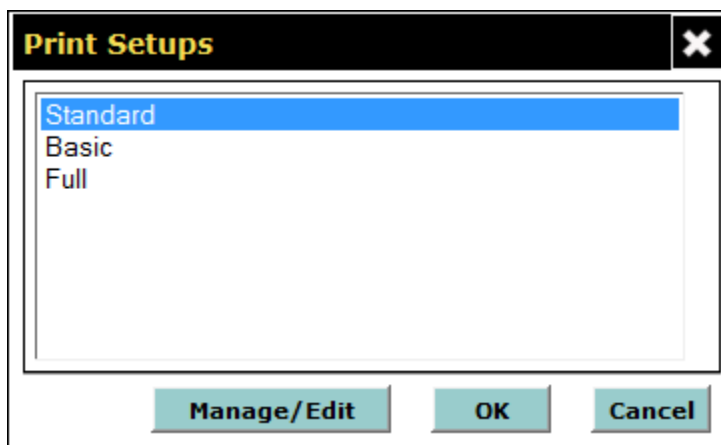
## Print Member Associations

You can print the member's associations.

*To print the member's associations*

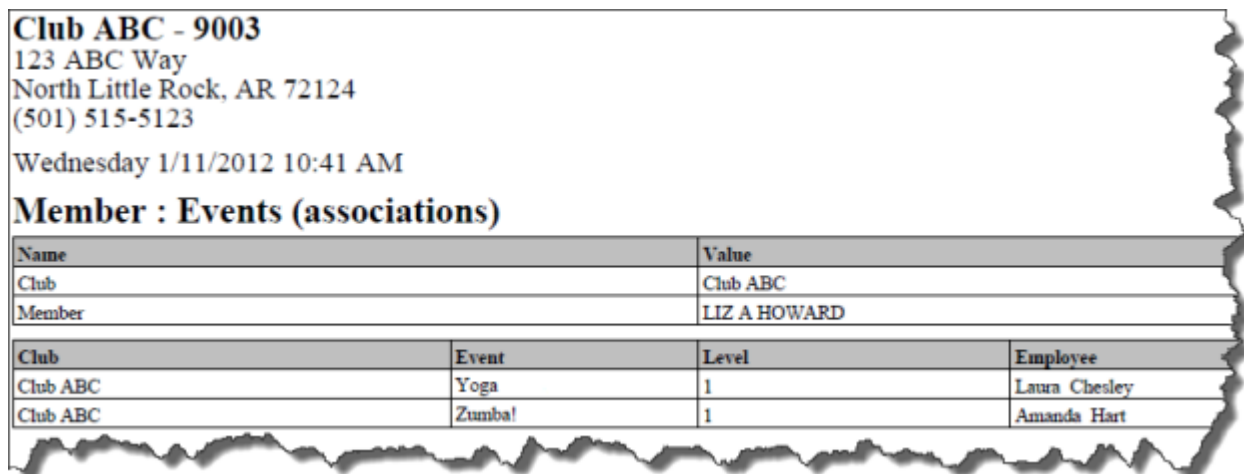
1. Click **Print** at the bottom of the member's Events page.

The Print Setups dialog box appears.



2. Click **OK** to use the Standard setup or select a different setup option if available.

A PDF appears as shown in the example below:




3. Print the PDF.

## Remove Member Associations

If necessary you can remove one or more member associations.

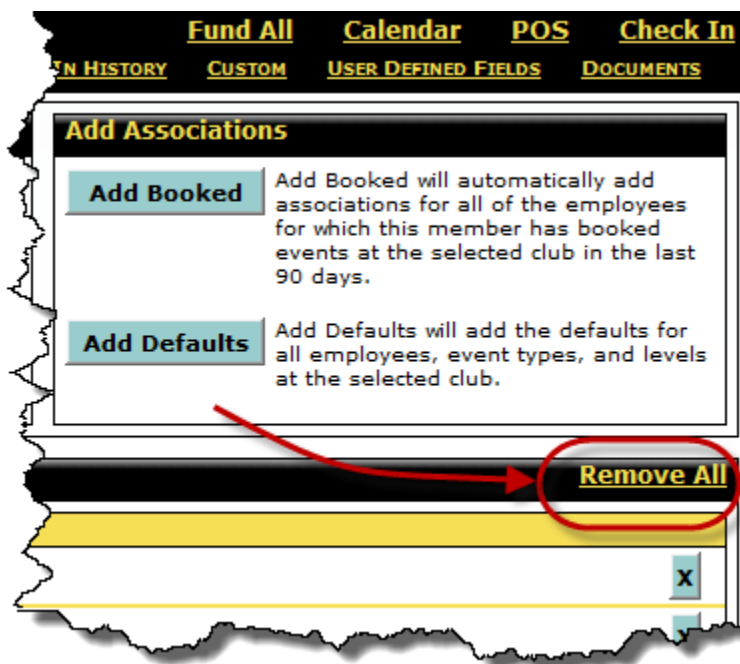
*To remove a single association:*

1. In the Associations list, find the desired association.
2. Click the delete button .

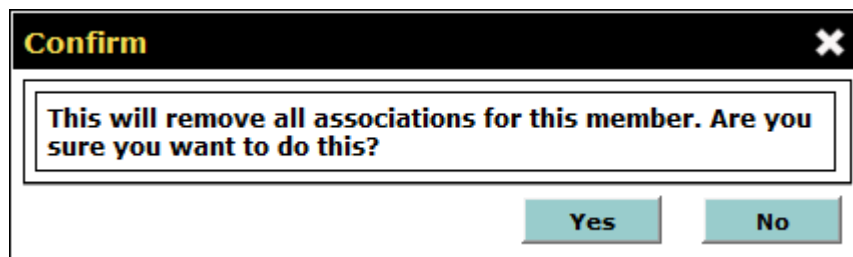
This only removes the single association.

*To remove all associations:*

1. Click **Remove All**.



2. When the Confirm dialog box appears, click **Yes**.



All associations are removed.

## Security Roles for Scheduling Associations

Security roles govern the ability to view or manage scheduling associations.

**Note:** To manage scheduling associations, you must already have the **Employee Tracking - Access** security role.

In the Scheduling Security > Scheduling Associations section, select Yes for the security roles you wish to activate.

The available security roles are described in the table below:

Security Role	Description
<b>Associations - View</b>	Allows access to the association section on the Employee Tracking page.
<b>Associations Add Any - Perform</b>	Allows employees to add associations between any members and employees.
<b>Associations Add Self - Perform</b>	Allows employees to add associations between members and the logged in employee.
<b>Associations Auto Add - Perform</b>	Allows employees to automatically add associations between <ul style="list-style-type: none"> <li>• a member and all employees that the member has booked events with over the past 90 days.</li> <li>• an employee and all members that the employee has booked events with over the past 90 days.</li> </ul>
<b>Associations Remove Any - Perform</b>	Allows employees to remove associations between any members and employees.
<b>Associations Remove Self - Perform</b>	Allows employees to remove associations between members and the logged in employee.
<b>Default Associations - View</b>	Allows employees to view default associations.
<b>Default Associations Create - Perform</b>	Allows employees to created new default associations for employees to be set for new members at a particular club, event type, and training level.
<b>Default Associations Remove - Perform</b>	Allows employees to remove default associations.