![abc FINANCIAL]

Managing Your Scheduling Availability

October 18, 2011

Contents

About Availability

DataTrak's Availability feature allows you to indicate when you are available for scheduling on the calendar.

With the appropriate access to the Employee Tracking page you can

- Set the Track Availability flag.

- Set your availability to create a static or flexible schedule each week.

- Copy availability.

  o Copy within the calendar's booking window.

  o Copy a week's schedule to other weeks.

  o Copy availability for multiple employees at one time.

    Note: To copy availability for multiple employees, you must also have access to the **Manage Availability** page.

- Clear availability from the calendar.

- View past availability (for up to 21 days in the past).

By performing the actions listed above, you can quickly and easily set and manage your own availability, whether your calendar's agenda is the same from week to week or you have a flexible schedule.

Track Availability

To set your availability, you must first turn on the track availability flag. When the Track Availability flag is turned on, you can specify when you are available for scheduling. You can also set up alternate schedules from week to week.

When setting the Track Availability flag, please note the following:

- The default setting for the Track Availability flag is **No** (off): the calendar view shows your time as always available for scheduling.

- When the Track Availability flag is set to **Yes** (on), the default calendar setting becomes **Unavailable** until your available days and times are entered.

- If availability has been set but then the flag is changed back to **No**, the calendar view again shows your time as always available. However, DataTrak retains your availability and displays it once the flag is again set to **Yes**.
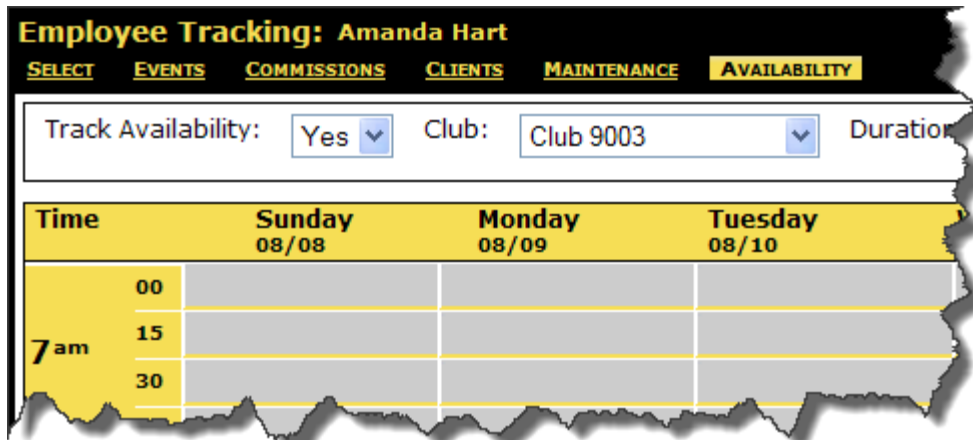
To set the Track Availability flag

1. Click **Menu**.

2. In the Schedule submenu, click **Employee Tracking**.

   The logged in employee is selected by default. If necessary, select another employee.

3. Click the **Availability** tab.

4. Set the Track Availability flag to **Yes**.
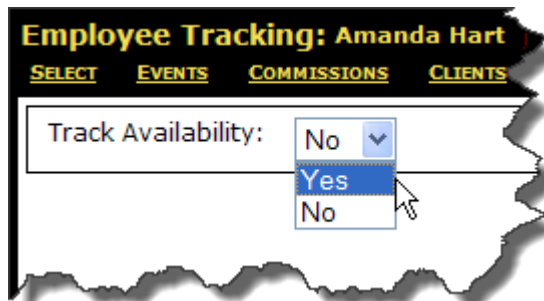
Once the flag is set to **Yes**, the calendar view appears allowing you to set availability.
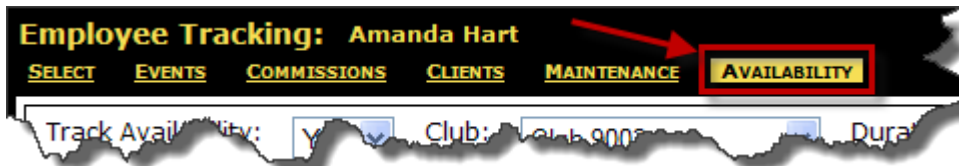
Set Availability

You can set availability for an infinite number of weeks, and each week can contain different availability hours. You can also copy a week's schedule to other weeks in the future. (For more information, see Copy Week and Copy Availability for Multiple Employees.)
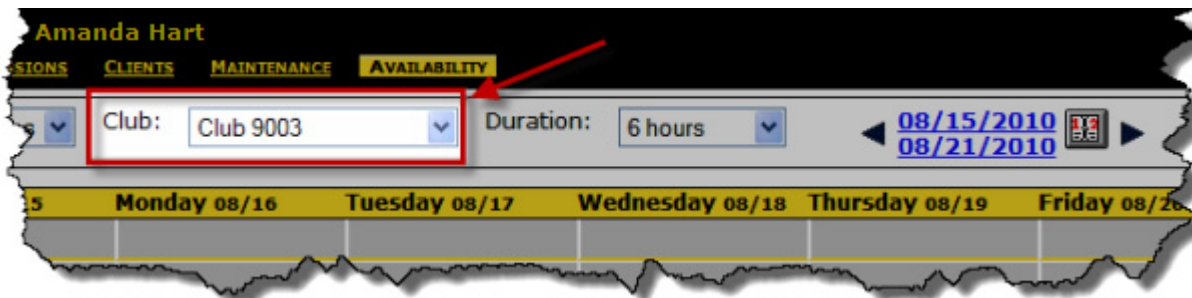
Depending on your security access, you may only be able to view your own availability on the Employee Tracking page.
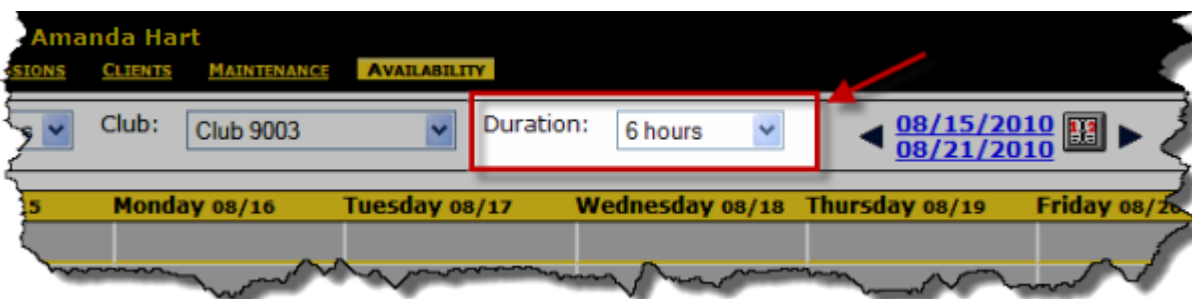
To set availability

1. Click **Menu**.

2. In the Schedule submenu, click **Employee Tracking**.

   The logged in employee is selected by default. If necessary, select another employee.

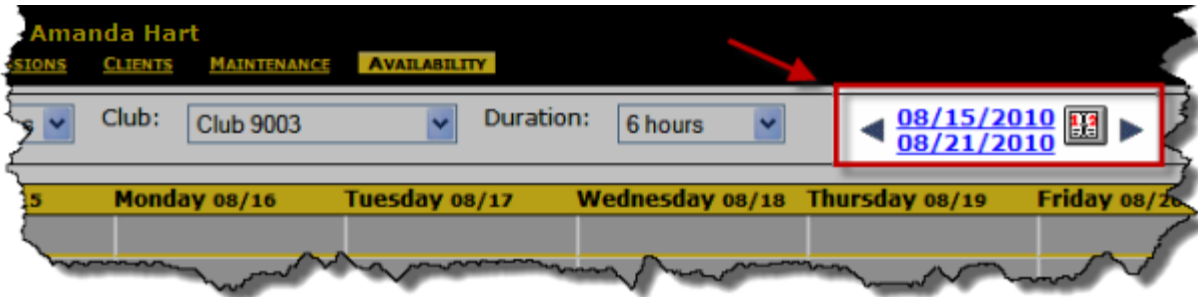3. On the Employee Tracking page, click the **Availability** tab.


4. Select the **Club**.

5. Select the **Duration**.

   The default is 1 hour.

6. Select the **Week**.

7. On the calendar, click the intersecting day and start time to set your availability.

   The calendar then displays the selected days and times that you are available.

   For example, in the following image the calendar indicates that availability is set for Monday, Wednesday, and Friday from 8:00 a.m. to 2:00 p.m.
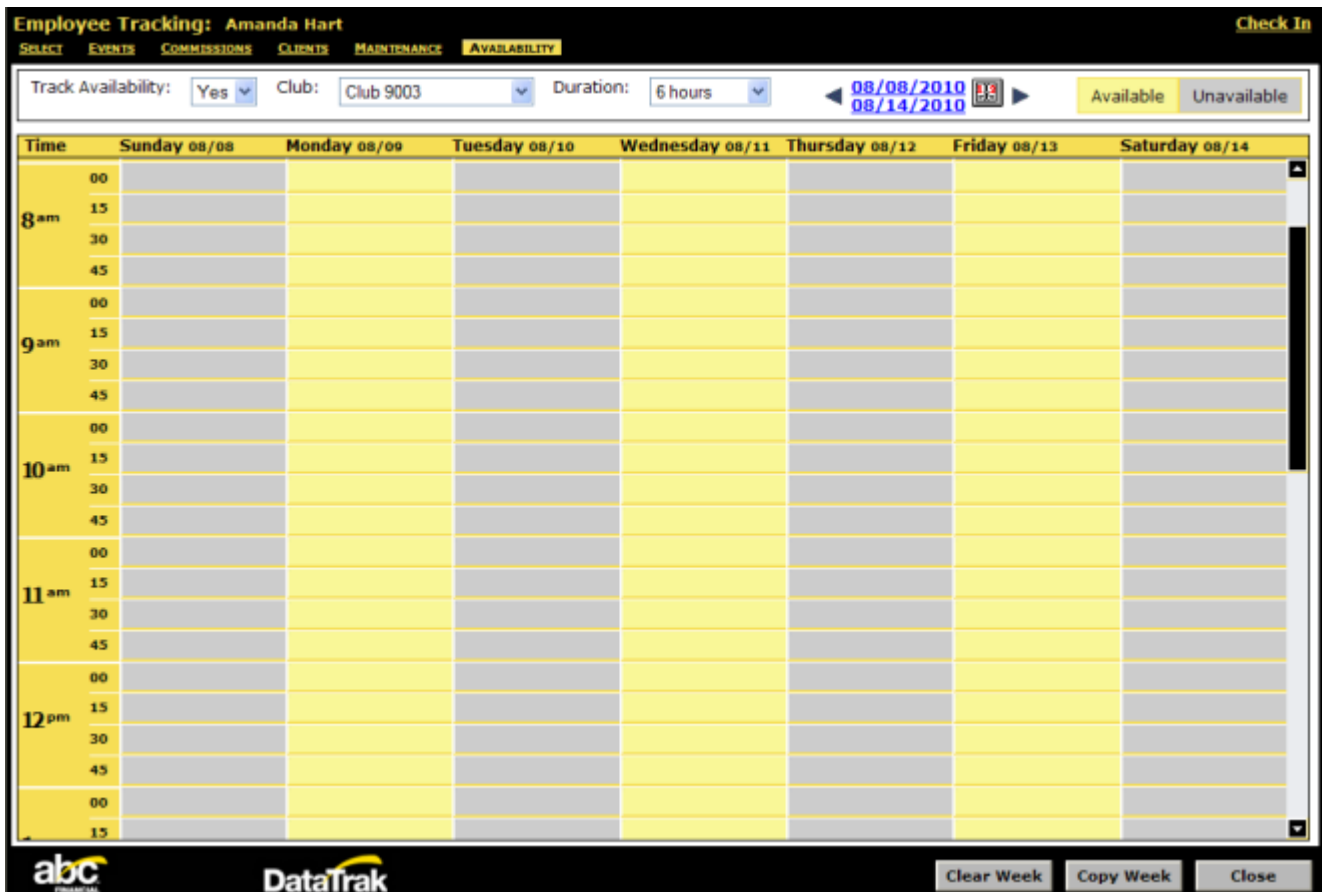
8. Once the week's schedule is set, select another week to set a different availability schedule or you can copy the current week to other weeks. (For more information, see Copy Week and Copy Availability for Multiple Employees.)

9. When finished, click **Close**.

Copy Availability

The Calendar's booking window determines how far into the future you can copy availability. You can copy availability for a single individual or multiple employees.

Note: Although the Calendar's booking window determines how far into the future you can *copy* availability, you can still *manually* set availability beyond the booking window. (For information on manually entering availability, see Set Availability.)

This section contains the following topics:

* Booking Window

* Copy Week

* Copy Availability for Multiple Employees

Booking Window

The booking window is set on the Company Schedule Options page. It defines the scheduling time frame for the Calendar, which determines how far into the future you can copy availability.

Important! The booking window is a company-level setting that is intended for use with the Calendar. Changing the booking window changes the time frame in which events can be booked on the Calendar for all clubs within the company.

The find and view the booking window

1. Click **Setup**.

2. In the Schedule Setup submenu, click **Configuration**.

3. On the Schedule Configuration page, click the **Company Options** button at the bottom of the page.

   The **Booking Window** option is at the top of the Company Schedule Options page.

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Copy Week

You can copy a week's worth of availability to other weeks by specifying a date range in the future. The booking window determines how far into the future you can copy availability. You cannot copy a schedule to a week in the past, but you can copy a past schedule to a week in the future. DataTrak retains up to 21 days of past availability.
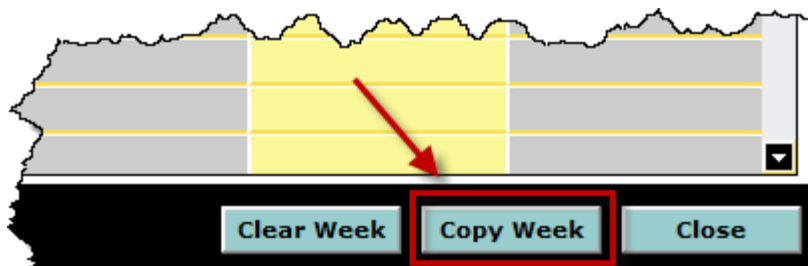
Important! The **Copy Week** feature deletes any availability that exists within the begin and end dates you choose and then replaces it with the availability that is copied from the selected week.

To copy a week

1. On the Availability page, select the week you wish to copy.
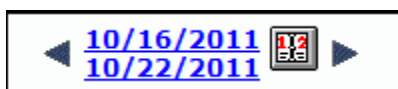
2. Click the **Copy Week** button at the bottom of the page.

3. When the Copy Availability dialog box appears

    o   Select the **Begin Date**.

        This date must be after the last day of the selected week.

    o   Select the **End Date**.

        This date must be after the begin date.

    o   Click **OK**.

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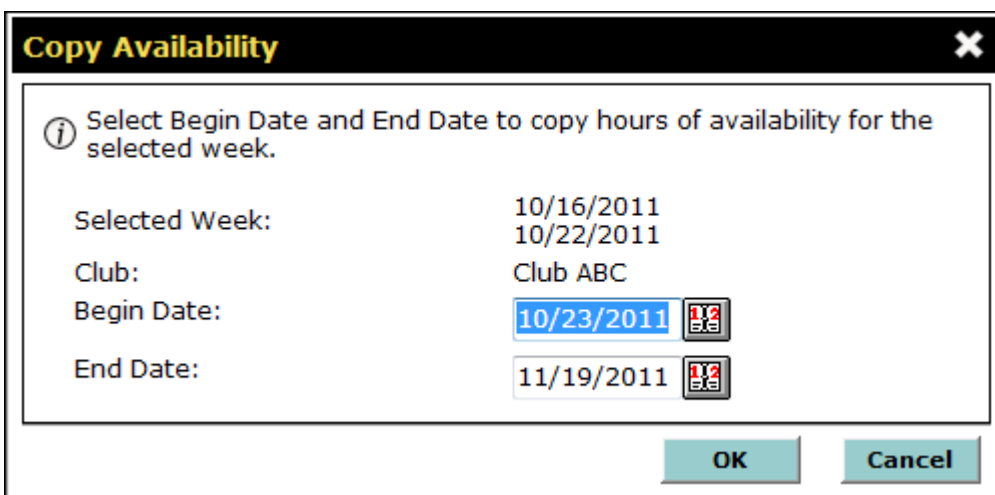
Copy Availability for Multiple Employees

The Manage Availability page allows you in one action to copy availability for multiple employees for up to two (2) years. The booking window determines how far into the future you can copy availability.

Note: To copy availability for multiple employees, you must have appropriate access to the Manage Availability page.

Perform these steps for each club and each department within the club as needed.

To copy availability for multiple employees

1. Click **Setup**.

2. In the Employee submenu, click **Availability**.

   The Manage Availability page appears.

3. Select the **Club**.

4. Select the **Department**.

   All employees in the selected department who have their Track Availability flag set to **Yes** appear in the Selected column. The system copies each person's availability for the selected week.

5. In the **Copy From Dates** section, select the week to copy.

6. In the **Copy To** section, select the date range.

   o The **From** date cannot be before or during the week being copied. If you attempt to set the **From** date on or before the copy date, DataTrak displays an error message as shown in the image below.
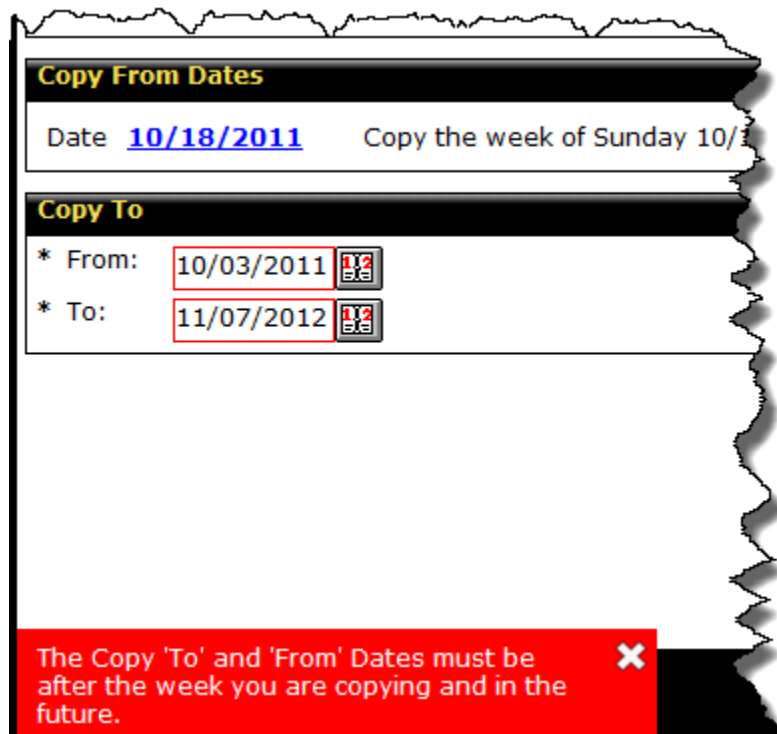
o   The **To** date (maximum copy date range) is determined by the booking window setting and today's date.

For example, if the booking window is set to 24 months you cannot set the **To** date beyond that time frame. If you attempt to set the **To** date beyond the booking window, DataTrak displays an error message as shown in the image below.

7. When finished, click **Save**.

Clear Week

You can remove availability for a single day by selecting the duration for the amount of time to clear and then clicking a block of availability on the calendar.

If necessary you can use the **Clear Week** feature to remove availability from one or more weeks.
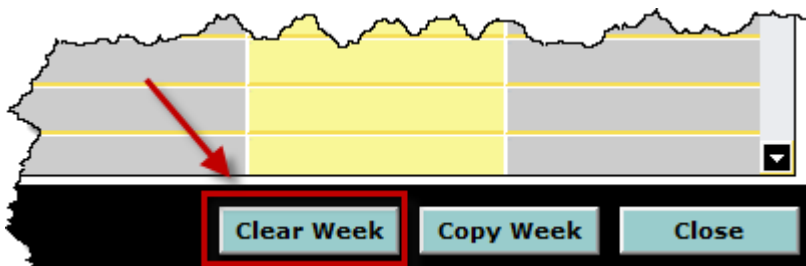
To clear availability for one or more weeks

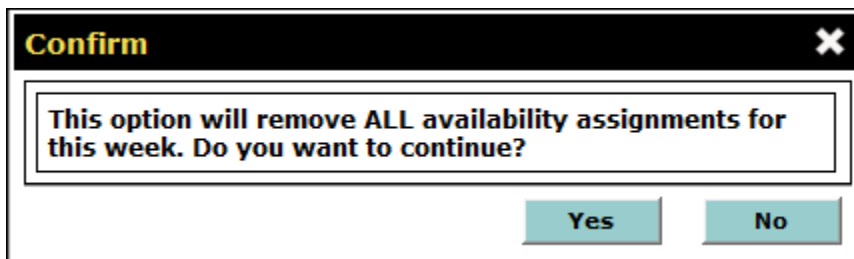1. On the Availability page, select the week you wish to clear.

    In the following example, the calendar shows available times in yellow and unavailable times in gray.
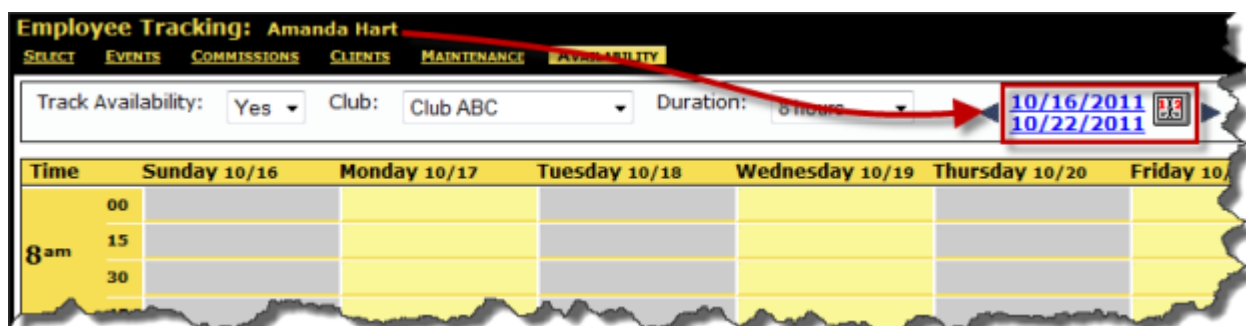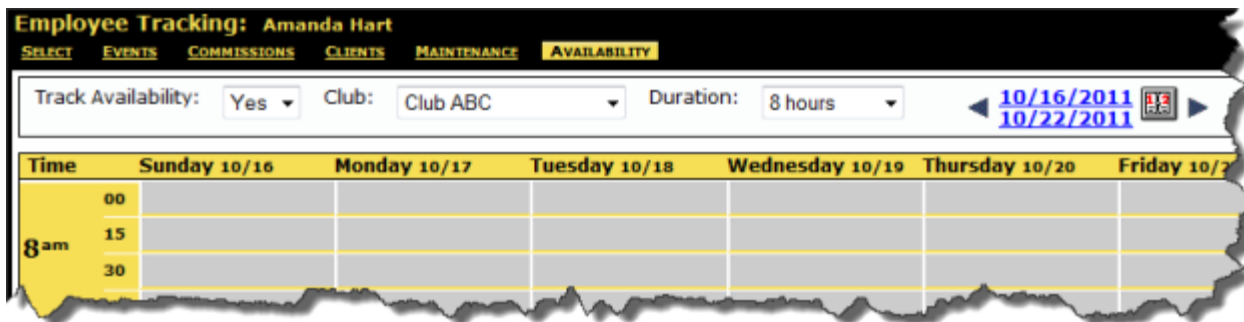

2. Click the **Clear Week** button at the bottom of the page.

3. When the confirmation dialog box appears, click **Yes** to continue.

The calendar for the selected week displays an unavailable status in gray, as shown in the image below.

4. To clear additional weeks, click the **Copy Week** button and copy that cleared schedule to the desired weeks.

5. When finished, click **Close**.

View Past Availability

You can use the date selector on the Availability page to view up to 21 days of past availability. DataTrak retains only three weeks of past availability to ensure optimal performance.

If you attempt to view information for more than 21 days in the past, DataTrak displays an error message as shown in the following image.