



Employee Portal 1.0.0 Release Notes

August 7, 2012

The following is an overview of this release:

Release Date:	Tuesday, July 24, 2012
Release Number:	1.0.0
Enhanced Areas:	<p>Introducing the Employee Portal! A web-based application that trainers can use to view and manage their schedules online.</p> <p>The Employee Portal is part of our Premium MYiCLUBonline. Contact your Account Executive to add the Employee Portal.</p> <p>For full details, refer to the following sections:</p> <ul style="list-style-type: none">• About the Employee Portal• Sign in to the Employee Portal• Schedule• Availability• Clients• DataTrak Security

About the Employee Portal

As a trainer, you may need to manage your schedule while at home or away from the club. Now you can through the Employee Portal! You can set your availability, add members to classes, set up personal training sessions, complete or cancel events, and more! The Employee Portal can be accessed from the web or on a mobile device. It gives you access to DataTrak's scheduling features without having to be logged in at the club.

The ability to access and edit features online is governed by [DataTrak Security](#). If you do not have access to perform a particular function, there is no override ability within the Employee Portal.

Add the Employee Portal for your Club

The Employee Portal is part of our Premium MYiCLUBonline.

The web site for Employee Portal is portal.myiclubonline.com.

For information about how you can add the Employee Portal for your club, please contact your Account Executive.

Supported Browsers

The Employee Portal is supported in the following browsers:

- Internet Explorer 7, 8, and 9
- Firefox (latest version)

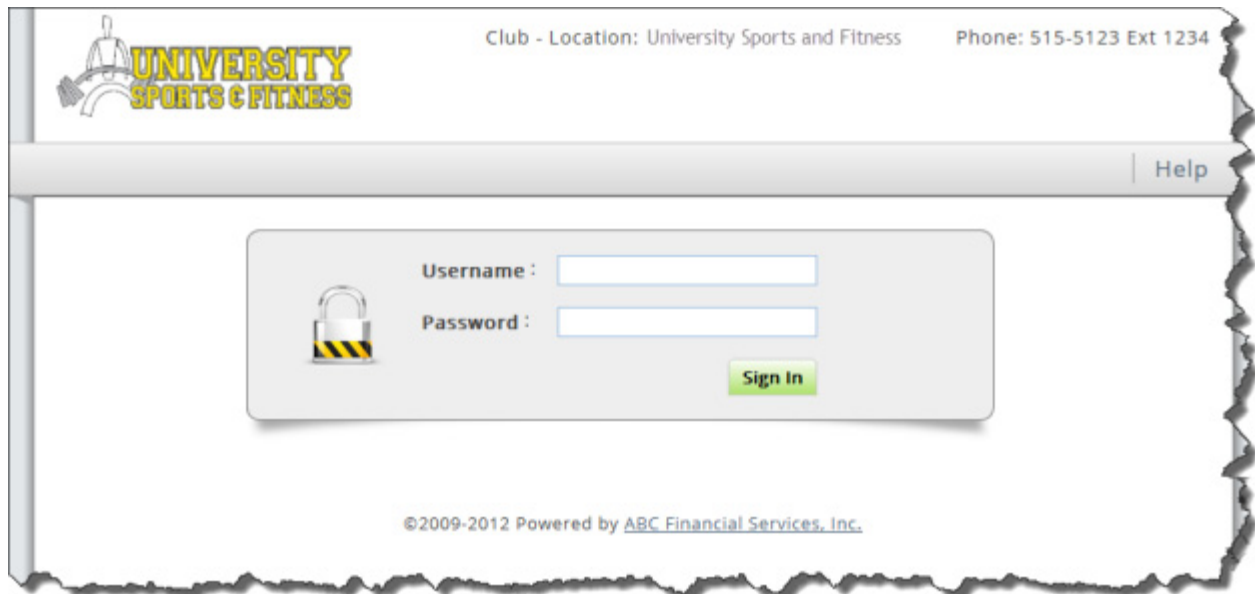
- Chrome (latest version)
- Safari (latest version)
- Ipad2

Sign In to the Employee Portal

To sign in to the Employee Portal you must have a DataTrak username and password. If you are signing in to the Employee Portal using a generic URL which includes the club number, you must have the appropriate club number.

Note: The sign in page does not provide links to reset passwords or retrieve user names. If you forget your DataTrak password or username, you must have the club reset your password or retrieve your user name in DataTrak.

An example of the sign in page is shown below:



UNIVERSITY
SPORTS & FITNESS

Club - Location: University Sports and Fitness Phone: 515-5123 Ext 1234

Help

Username :

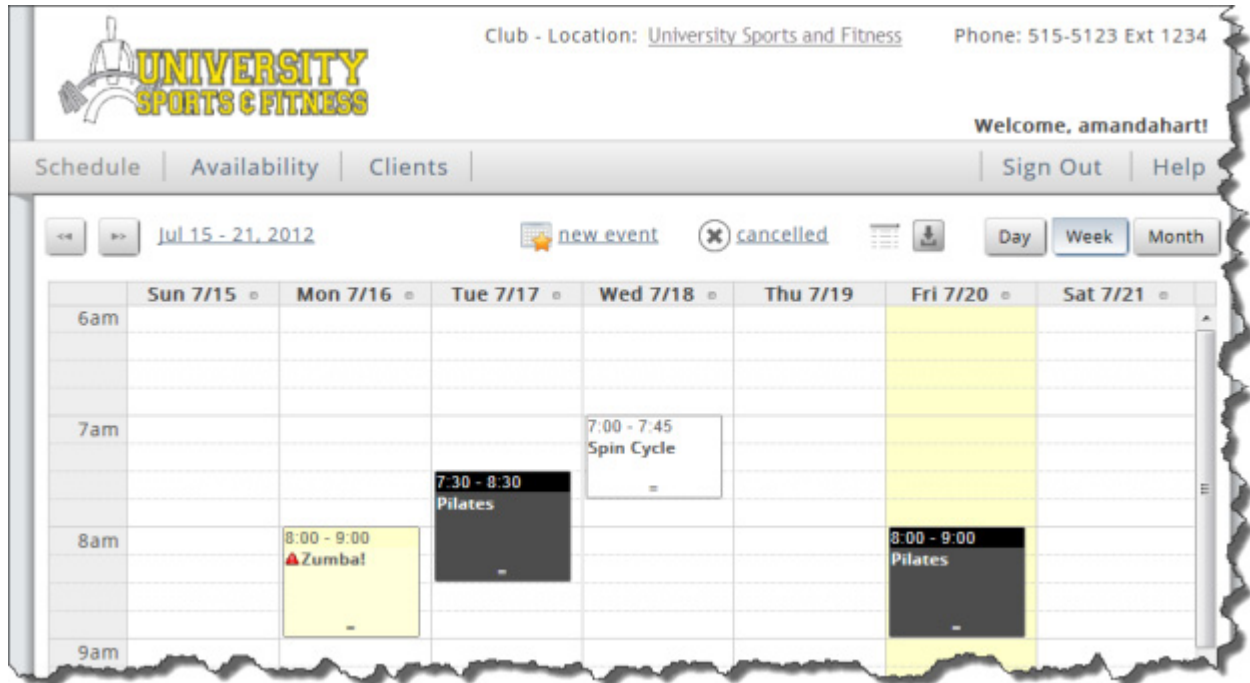
Password :

Sign In

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Schedule

When you log in to the employee portal, the first thing you will see is the Schedule page. An example of the Schedule page is shown below.



You can select a time frame and view events by day, week, or month within that time frame. You can see your scheduled events in Calendar or List format, and you can download your schedule. If you click an event you will see details about that event.

Note: In the Employee Portal you can only view your own schedule. To view other trainer's schedules, you must log in to DataTrak.

In addition to viewing your schedule, you can also perform the following tasks:

- **Create events** – When you create an event you are automatically attached to that event. You can create an event for a member or prospect regardless of the assigned associations; the member does not have to be associated with the event, level or trainer. If the event allows overbooking, you can add more clients than the max number of attendees for that event.
- **Change an event's date or time** – You can drag and drop events to another date or time, or you can open and modify the event.
- **Add or remove members from events** – You can add active primary or secondary members or prospects to an event. A member or prospect can be added to an event whether or not they have paid in advance for a service to fund the event.

Note: An event's Online booking and cancellation windows do not apply to the Employee Portal; they only apply to MYiCLUBonline.

- **Complete events** – You can complete your own events online. The event must be funded by all members in the event. If the event requires an employee, member, or location to complete, those items must be added before you can complete the event.
- **Cancel events** – You can cancel your own events by selecting Cancel Event (charge) or Cancel Event (no charge).

Availability

The Availability page allows you to set your hours of availability online.

Note: You can only view or change your own availability.

An example of the Availability page is shown below:

Club - Location: University Sports and Fitness Phone: 515-5123 Ext 1234

UNIVERSITY SPORTS & FITNESS




Welcome, amandahart!

Schedule | Availability | Clients | Sign Out | Help















<< >> Jul 22 - 28, 2012 new recurrence clear copy week


	Sun 7/22	Mon 7/23	Tue 7/24	Wed 7/25	Thu 7/26	Fri 7/27	Sat 7/28
8am		8:00 - 5:00		8:00 - 5:00		8:00 - 5:00	
9am							
10am							

- **Set availability** – You can set availability on a week-to-week basis.

To set availability, click the new recurrence button  [new recurrence](#) at the top of the page. When the Set Recurring Availability dialog box appears, you can select your available days and times. If necessary, you can click the plus  or minus  buttons to add or remove rows.


Set Recurring Availability at University Sports - North Little Rock ✕

Day of Week	Start Time	End Time	Start Date	End Date		
Sun	select	select	07/20/2012	08/20/2012		
✓ Mon	08:00 AM	05:00 PM	07/20/2012	08/20/2012		
✓ Tue	08:00 AM	02:00 PM	07/20/2012	08/20/2012		
✓ Wed	10:00 AM	04:00 PM	07/20/2012	08/20/2012		
Thu	select	select	07/20/2012	08/20/2012		
✓ Fri	10:00 AM	02:00 PM	07/20/2012	08/20/2012		
✓ Sat	09:00 AM	03:00 PM	07/20/2012	08/20/2012		

 Existing availability is cleared before setting new availability for selected days.

Cancel Set recurring availability



- **Clear availability** – You can clear all availability for the entire week in one click; you do not have to clear each day individually.


To clear a week of availability, simply click the clear  [clear](#) button at the top of the page. When the Clear Availability dialog box appears, select the days of the week and the time frame to clear.

Clear Availability ✕


Clear availability at University Sports - North Little Rock for days of week:

Sun Mon Tue Wed Thu Fri Sat

from  through 

 Clearing availability does NOT remove existing events on those days.



- **Copy availability** – You can copy a week of availability by specifying a date range in the future. The club's booking window determines how far into the future you can copy availability.


To copy availability, click the copy week button  [copy week](#) at the top of the page. When the Copy Availability dialog box appears, select the time frame in which you wish to copy the week.

Copy Availability ✕

Copy your availability at University Sports - North Little Rock from week:

Sunday, July 22, 2012 through Saturday, July 28, 2012

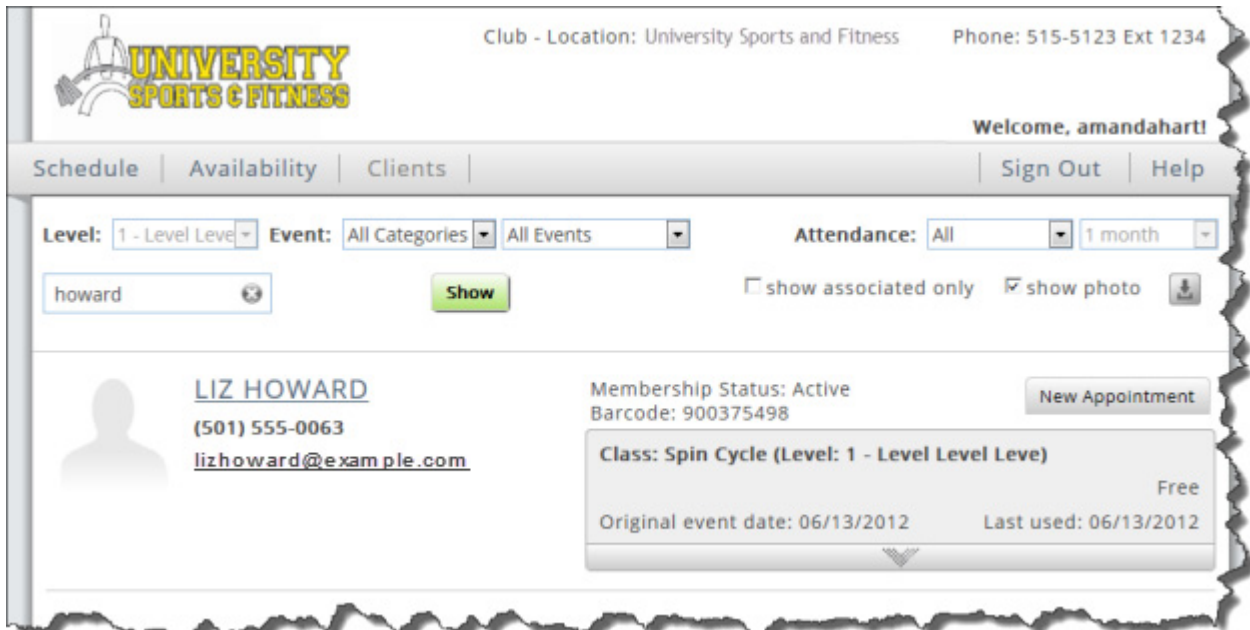
to  through 

 Existing availability is cleared before setting new availability for selected days.

Clients


The Clients page lets you search for members and prospects with whom you have scheduled an event. You can then download and save your search results.

- Filter the Client List – You can filter the list based on the following criteria:
 - o Training level
 - o Event type
 - o Attendance – Will see in, Not seen in, or Seen within a specific time frame (1 month, 2 months, 3 months, 6 months, 9 months, or 12 months)
 - o Association – Show only those members with whom you are associated.
- Search for a member or prospect – Enter the member’s first or last name to find a specific member.



- Show member details – Once you have found the desired member, you can view details about that member based on your security roles.

Client Details ✕



LIZ HOWARD (501) 555-0063 Birthday: Apr 1st Age: 32
11205 MAPLE STREET Barcode: 900375498
SHERWOOD, AR 72124-1234 lizhoward@example.com

Events | Emergency Contact | Check-in History | Membership | Session Balance | Notes

07/20/2012 to 07/27/2012 show comments

THU 07/26/2012	Description	Healthridge - North Little Rock
8:00pm - 9:00pm	Zumba! with Stephanie Wilder	✓ funded Break

DataTrak Security Roles


We added security roles in DataTrak to control access to the Employee Portal. These security roles are divided into the following sections: Members Security, Event Security, and Employee Tracking.

- **Members Security** - These security roles allow you to grant access to member information. The Members Security roles are shown below.

Edit Security Access Roles

General

* Name: Description (50/50)

 Click on a security function for a description of its usage.

Functions [Expand All](#)

— No (All) **Employee Portal All Access**

— No (All) **Members Security**

- No Member Address - Access
- No Member Barcode - Access
- No Member Birthday and Age - Access
- No Member Check-in History - Access
- No Member Email Address - Access
- No Member Emergency Contact - Access
- No Member Events - Access
- No Member Membership Details - Access
- No Member Notes - Access
- No Member Phone Numbers - Access
- No Member Session Balance - Access
- No Member/Prospect Notes - Create
- No Member/Prospect Notes - Delete

+ No (All) **Scheduling Security**

+ No (All) **Employee Tracking**

- **Event Security** – These security roles allow you to grant access to perform various tasks related to events. The Event Security roles are shown below.

Edit Security Access Roles

General

* Name:

Description (50/50)

Click on a security function for a description of its usage.

Functions [Expand All](#)

- **Employee Portal All Access**
- + **Members Security**
- **Scheduling Security**
 - **Event Security**
 - Add/Drop Clients in Event - Perform
 - Cancel Charge Event - Perform
 - Cancel No Charge Event - Perform
 - Complete Event - Perform
 - Create Event - Perform
 - Event Comment - Create/Edit
 - Event Details Edit - Perform
 - Event Duration Edit - Perform
 - Skip Verification - Perform
- + **Employee Tracking**

- **Employee Tracking** - Allows you to grant employees the ability to view the Manage Employee Tracking page.

Edit Security Access Roles

General

* Name: Description: (50/50)

Click on a security function for a description of its usage.

Functions [Expand All](#)

- No (All) **Employee Portal All Access**
 - + No (All) **Members Security**
 - + No (All) **Scheduling Security**
 - No (All) **Employee Tracking**
 - No Employee Tracking - Access