

Scheduling System

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Scheduling System

The AAC Scheduling System may be used to set up activities/appointments for customers. Classes and appointments may be set up in the scheduling system. **Remember: classes set up in the Class Manager do not correspond with classes set up in the Scheduler. The Scheduler is completely separate from all applications except for Check in.**

To access the Scheduler, from the Menu Bar in Check-in or POS, select FrontDesk and then click on Scheduler

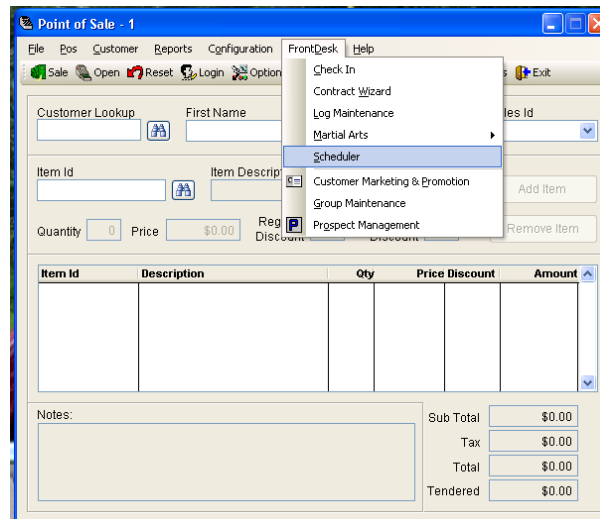


Figure 31-1.

Scheduled items for each individual customer may be viewed in Check-In. The scheduled items may be marked for attendance. This is the only functionality the scheduler has in the Check-In application.

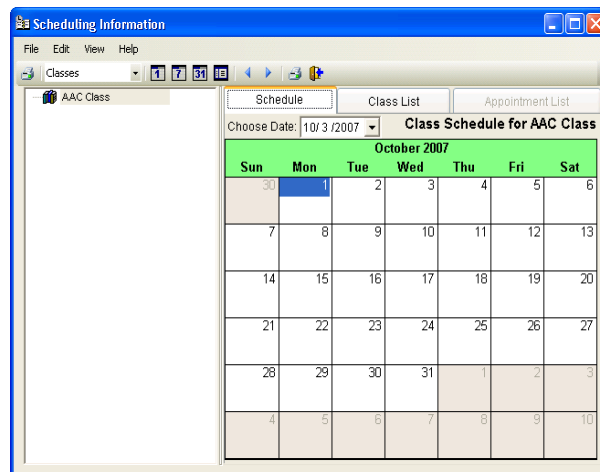



Figure 31-2.

The schedule can be viewed various way. Options include: by instructor, appointments, classes, groups, or students. It can also be viewed by day, week, or month .

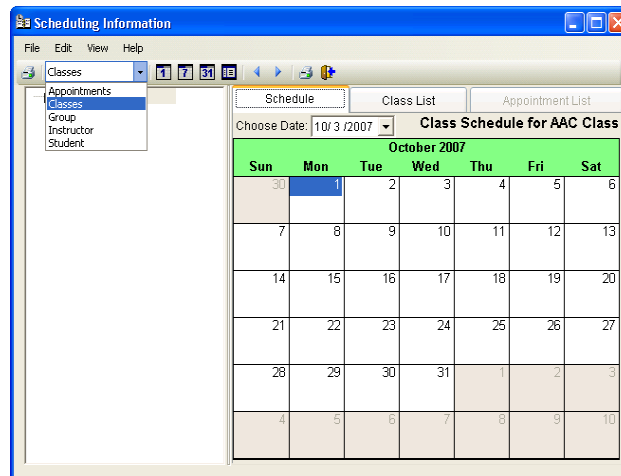


Figure 31-3.

Setting up Activities

Activities must be set up for scheduling. To do this, click on the edit drop down menu located at the top of the scheduler screen and choose Setup Activities.

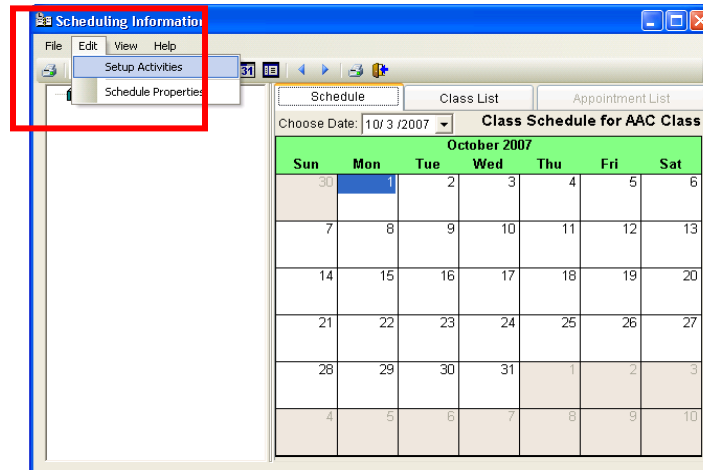




Figure 31-4.

Click on the **"New"** Button to setup an activity. The screen, as shown below, will allow individual classes and appointments to be set up for scheduling.

 Open the FD Scheduler Reports Application
 Undo Changes to an Existing Record.



 Save Activity Record.
 Delete an Activity Record.



Figure 31-5.

Activity Name: Identifiable name to be assigned for the new activity. Make sure that it is something that will be recognized.

Schedule Type: Choose whether the activity will be a class or appointment.

Show Groups: Click on this icon to show any groups that have been previously created or to create a new group.

Click on the **“New”** Button to enter a new group record and then click the Save Button. Groups may be deleted by highlighting the appropriate group in the Select Record Box and clicking on the **“Delete”** Button.

Figure 31-6.

Program Group: Select a group for the activity to be linked to.

Instructor: Consists of employees entered into the system. It is optional to choose an instructor for the activity.



Show Locations: If the classes or appointments are in multiple locations, use this icon to view or set up various rooms or buildings to attach to each activity.

Click on the **“New”** Button to enter a new room record and then click the **“Save”** Button. Rooms may be deleted by highlighting the appropriate room in the Select Record Box and clicking on the **“Delete”** Button.

Figure 31-7.

Locations: Attach the room or location in which the activity will take place.

Contact: Person that can be contacted for information about the activity.

Occupancy: The total number of people allowed in the class or appointment.

Activity Fee: Fee charged for the activity.

Activity Length: Length of time in minutes that the activity will last.

Apply Fees: Fees can be applied to the activity as a whole, or for each individual class or appointment.

Description of Activity: An optional description of the activity to further help identify it.

Select Record: Click on each listed activity in this list to see the entered information on it or to delete the record.

Click the **“Save”** Button to save a new record. Once it is saved, it will appear in the Select Record Box. From this screen a new record may be added by clicking on the **“New”** Button. After records are entered, they may be clicked on individually so their information may be viewed.

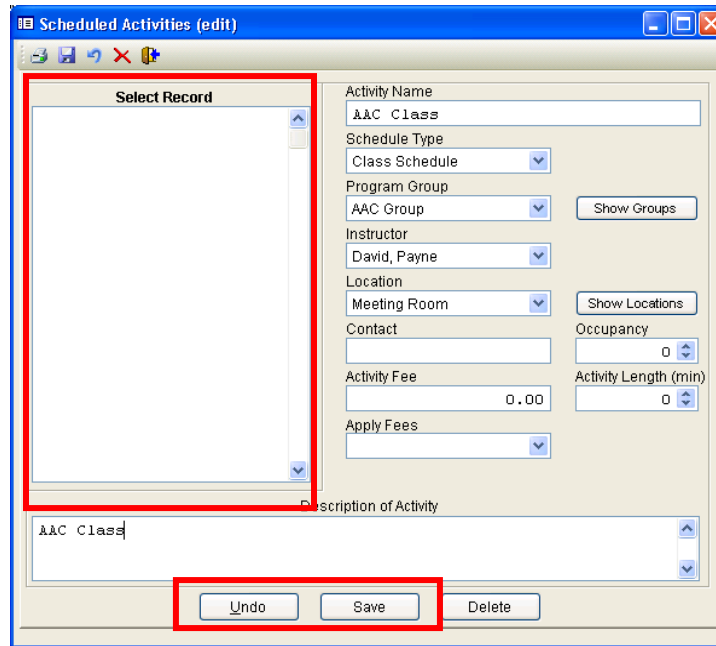


Figure 31-8.

Scheduler Properties

Click on the edit drop down menu and choose Schedule Properties to set the start and end times for scheduled activities.

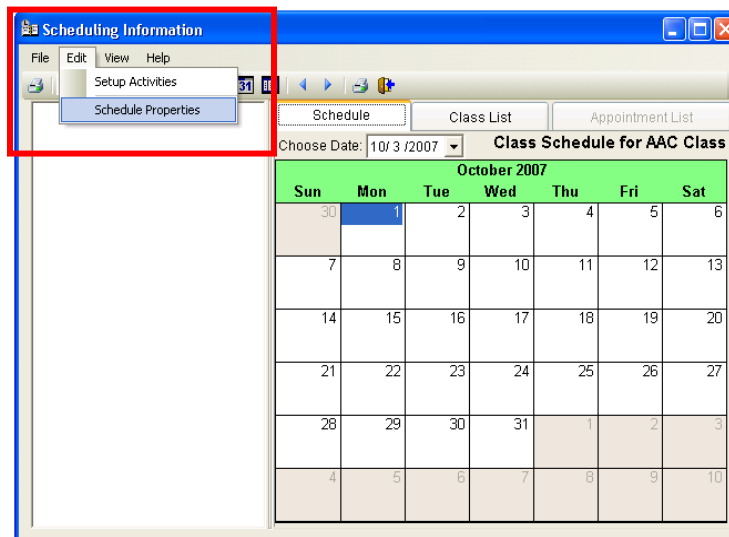


Figure 31-9.

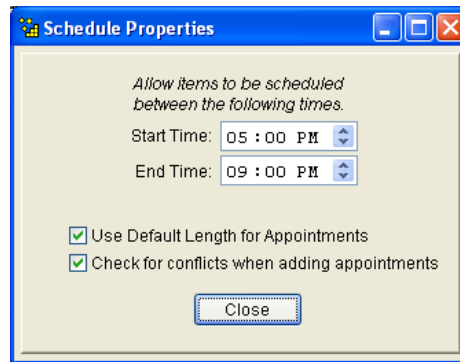


Figure 31-10.

If a start time and end time are set in the scheduler properties window, no appointment or class can be scheduled before the start time or after the end time. A default length can be used for appointments and the scheduler can check for conflicts when new appointments are added.

After everything has been set up in the AAC Scheduler, activities may be scheduled for customers. These activities are either classes or appointments and can be recurring or non-recurring events.

Scheduling Single Appointments & Classes

Basic Steps for Scheduling Classes and Appointments:

1. Choose a view. Then highlight the item being scheduled in blue. Double click on the date in which the activity will occur.

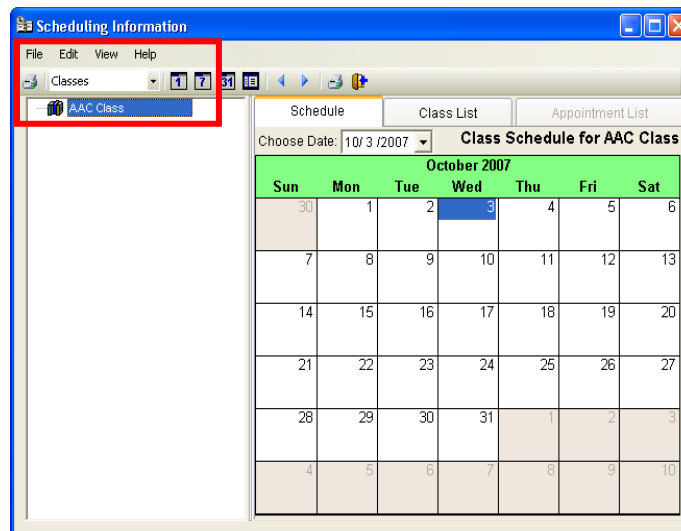


Figure 31-11.



- Use the Class Schedule Properties window to add new class schedules as well as delete scheduled classes. The Appointment Schedule Window may be used to schedule single appointments. If an appointment is being entered, select a customer by clicking on the "Binocular" Button.

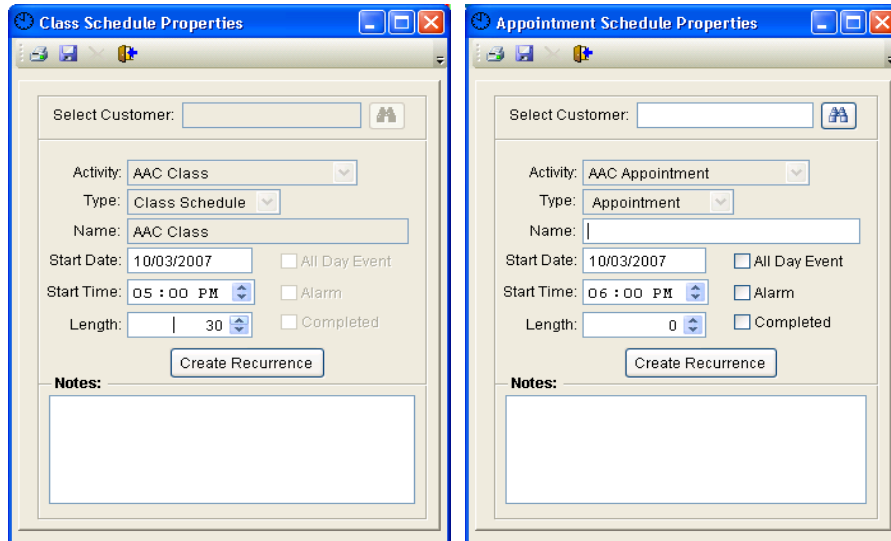



Figure 31-12.

- Enter the date and start time of the single event.
- Choose how long the appointment or class will be.
- Add any notes if desired to the entered appointment or class.
- When finished, click on the "Save" Button  located at the top of the window.

Important Information about Scheduling Single Classes:

When scheduling a class for the day, click on the Class List tab and select the customers attending the class. The class list tab will show the occupancy of the class and will decrease the number of spots available as customers are attached to the class.

Select students by highlighting them in blue on the left hand column and clicking on this symbol (>). Students can also be added by double clicking on each individual name in the left hand column. Their name will appear in the right hand column.

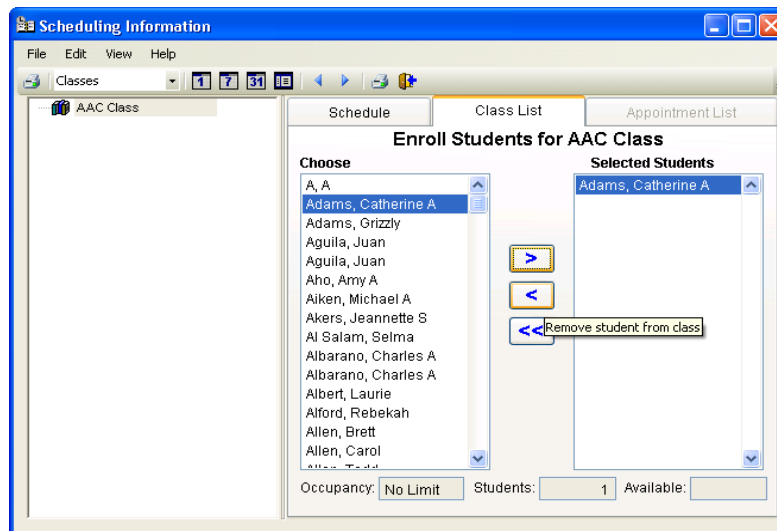


Figure 31-13.

Important Information about Scheduling Single Appointments:

Select the appointments view located in the top left of the scheduler window and choose one of the appointments that have been created. The appointment list tab will show all scheduled appointments for the chosen class.

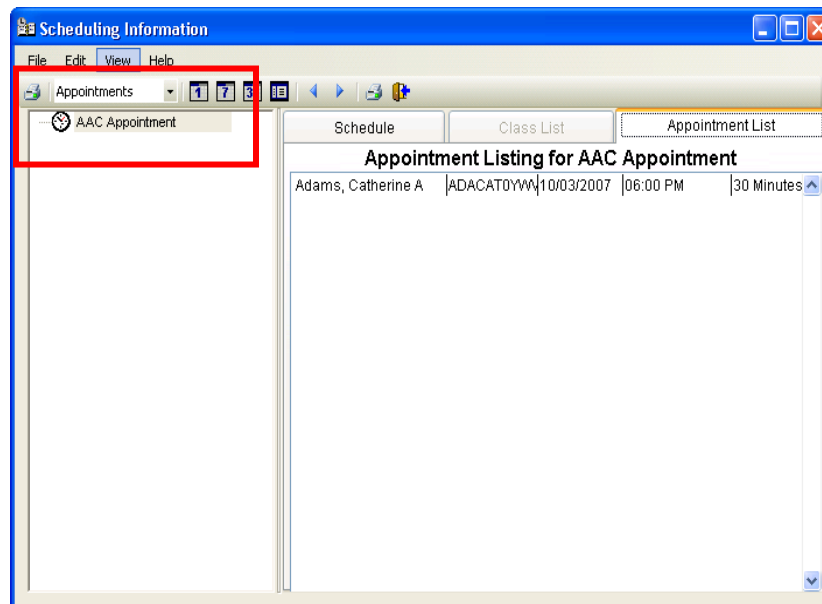


Figure 31-14.



Scheduling Recurring Appointments or Classes

When scheduling recurring events, the basic setup on the Class and Appointment Schedule Properties is the same as described on previous pages.

Once the basic scheduling information has been entered, click on the “**Create Recurrence**” Button. A new window will open as shown below.

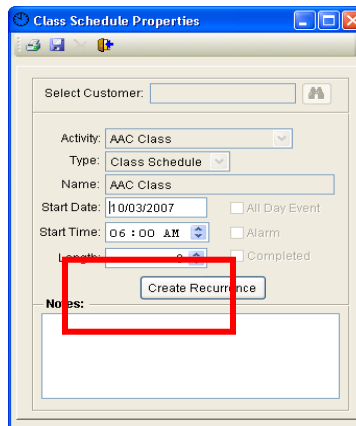


Figure 31-15.

Recurrence Choices

None: A recurrence will not occur.

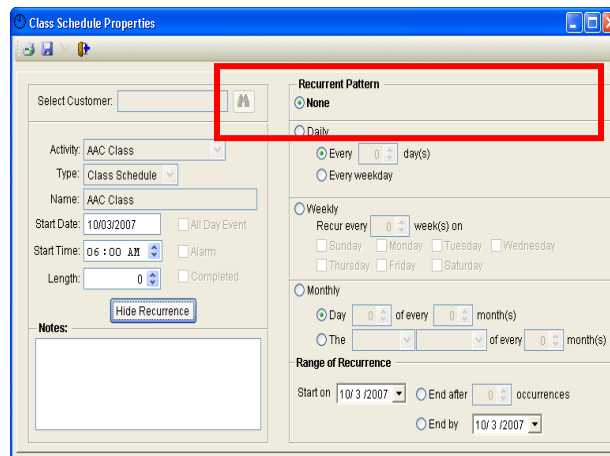


Figure 31-16.

Daily: The activity will happen every day. The event may take place every weekday or the number of days between occurrences can be set.

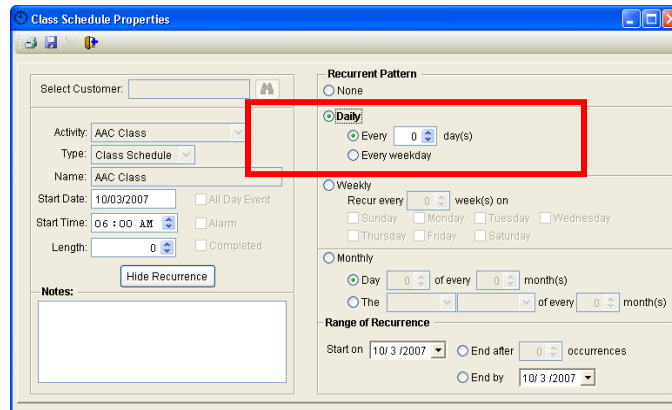


Figure 31-17.

Weekly: It will take place on a weekly basis. The activity may be set to occur between so many weeks, or a day can be chosen for the event to occur on every week.

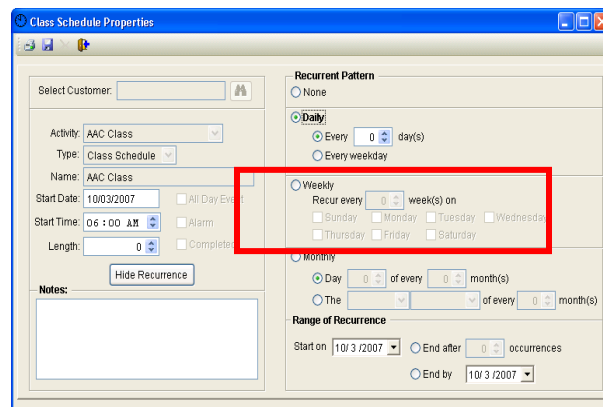


Figure 31-18.

Monthly: Set a day every month or between a specified numbers of months for the activity to occur.

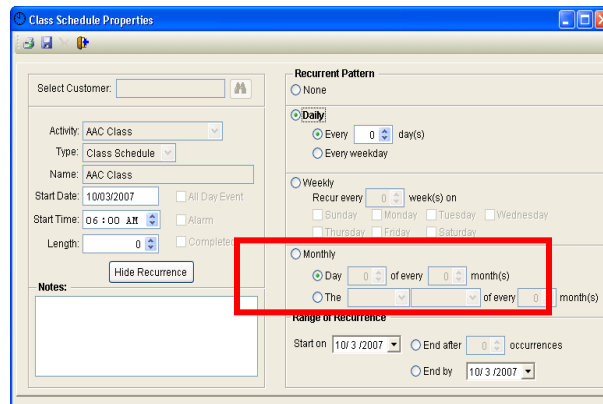


Figure 31-19.



Range of Recurrence: Choose the start date and the end date or the activity can end after so many occurrences.


The screenshot shows the 'Class Schedule Properties' dialog box. The 'Range of Recurrence' section is highlighted with a red box. It contains the following fields:


- Start on:** 10/3/2007
- End after:** 0 occurrences
- End by:** 10/3/2007

The 'Recurrent Pattern' section is also visible, showing 'Daily' selected with 'Every 0 day(s)'.

Figure 31-20.

Scheduling Reports

Reports may be run based on activities, classes, appointments, students, or instructors. To run the scheduler reports, click on the **"Printer"** Button  located at the upper left side of the scheduler window and the FD Scheduler Reports window will open as shown below.

 View Report before Printing

Activities Tab

Choose Activity: If only one activity is highlighted in blue, the reports will show the information for that activity.

Activity Listing: Will show a listing of all activities with name and description.

Activity Detail: All information entered during the creation of each selected activity will be shown.

Select All Activities: All reports will provide information for all listed activities.

Totals Only: The report will have no details. For example the Activity listing will show a total of 4 but no other information.

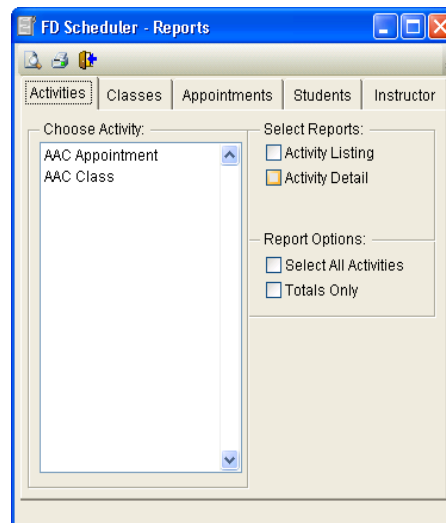


Figure 31-21.

Classes Tab

Choose Class: If only one class is highlighted in blue, the reports will show the information for that activity.

Class Roster: Listing of all customers attached to the class and totals at the bottom of the report.

Class Schedule: Scheduled dates and times for the chosen class with totals at the bottom.

Tracking Sheets: Shows each student in the class, their member type and the date their membership was entered. There is a checkbox for each student that can be marked to show that they came for the class. The date can be written at the top of the sheet, and totals are shown at the bottom.

Select All Classes: All listed classes will be shown in the reports.

Totals Only: The report will show no details of the class, only totals.

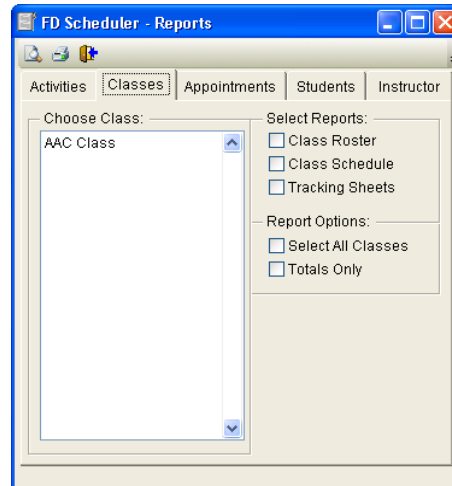


Figure 31-22.

Appointments Tab

Choose Activity: If only one activity is highlighted in blue, the reports will show the information for that activity.

Appointment Schedule: Shows the customer name, date of the appointment, time of the appointment, and the length with totals at the bottom.

Tracking Sheets: Same as the appointment schedule report with a checkbox to the side of the name for attendance marking.

Select All Activities: All listed activities will be shown in the reports.

Totals Only: The report will not show details of the activity.

IMPORTANT: Appointment reports can be pulled by date range. Make sure the date range is entered before running the report.

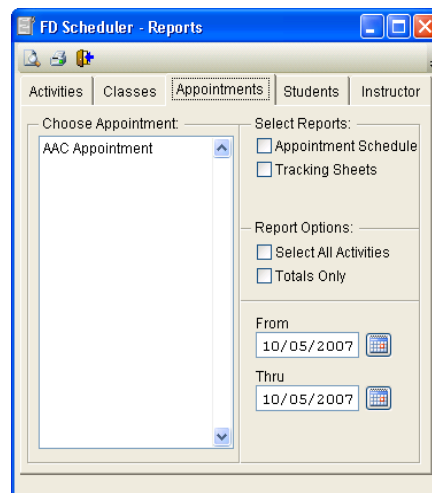


Figure 31-23.



Students Tab

Choose Student: If only one student is highlighted in blue, the reports will show the information for that particular student. To see all students, check the box next to Select All Students.

Scheduled Classes: Shows activity name and description with totals at the bottom.

Scheduled Appointments: Shows activity name and description with each appointment listed below. Date, time and length of each appointment will also be shown.

Select All Students: All listed students will be shown in the reports.

Totals Only: The report will not show details for the student(s).

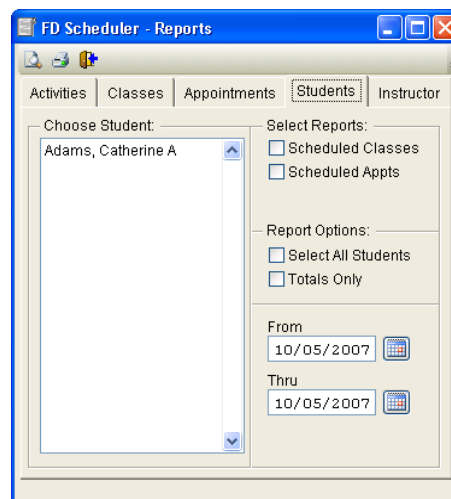


Figure 31-24.



Instructor Tab

Choose Instructor: If only one instructor is highlighted in blue, the reports will show the information for that particular instructor. To see all instructors, check the box next to Select All Instructors.

Scheduled Classes: Shows the activity name and description along with the detailed information for each class listed.

Scheduled Appts: Shows the same information as the scheduled classes report but for appointments.

Select all Instructors: Shows classes or appointments for all instructors.

Totals Only: The report will not show details for the instructor(s).

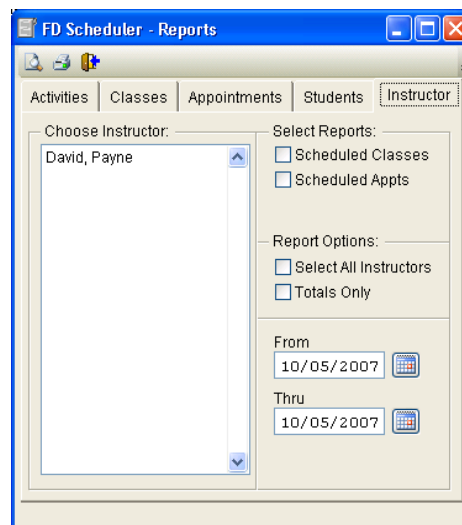


Figure 31-25.