UGA OUTDOOR RECREATION – OUTDOOR RECREATION CENTER – RUNNING ANNUAL REPORT DATA IN FUSION

Purpose: The purpose of this document is to outline the standard procedure by which the administrative team and/or ORC managers can run monthly sales/rental reports

Scope: The Outdoor Recreation Center (ORC) rents thousands of dollars' worth of inventory each year. The following protocol will provide a step-by-step guide by which an employee can retrieve report information for monthly/semesterly/annual reports.

Running Reports in Fusion:

I.   ORC - RETAIL SALES & FEES BY MONTH
   a.   Access "Reports," "Sales," and click on #37 "Product Sales Summary by Computer and Product Category"

   b.   Enter parameters (First day of month, last day of month)

   c.   Select RECORORC(3) as the computer*

        i.   *Note: the ORC computer changes in Fusion regularly and without notice—when in doubt, click all related to ORC.

   d.   Method of sale: select "In-person" sales

   e.   Select product categories: select "all" for products

   f.   Retail sales is the total in "Category: ORC Sales"

   g.   Subtract "Category: ORC Sales" total from the overall total to compute total revenue in late/damage fees.

II.   ORC - RENTAL SALES AND TOTAL UNIQUE RENTERS BY MONTH
   a.   Access "Reports" and click on #34 "Product Sales Detail by Computer and Product"

   b.   Enter parameters (First day of month, last day of month)

   c.   Select RECORORC(3) as the computer

   d.   Select "all" for products

   e.   You will need to subtract the non-rental revenue (sales/fees) from the overall total

   f.   To determine unique renters:

        i.   Export the file as an .xlsx document (Excel)
        ii.   Delete all columns other than "B" ("Sold To")
        iii. Click "Data" -- remove duplicates
              1.   You may need to unmerge/unwrap text (on "home" page)
              2.   The remaining names are the unique renters for the month

III.   WEATHER TRENDS
   a. Visit usclimatedata.com and type in the search parameters for Athens, GA and the month.

IV.   CLIMBING WALL – UNIQUE PARTICIPATIONS PER MONTH
   a. Access "Reports" and click #5 "Distinct Facility Usage by Membership Type and Facility"

   b. Enter parameters (First day of month, last day of month)

   c. Select "Climbing Wall" and "all membership types)

V.   CLIMBING WALL – TOTAL PARTICIPATIONS PER MONTH
   a. Access "Reports" and click #13 "Facility Usage by Membership Type"

   b. Enter parameters (First day of month, last day of month)

   c. Select "Climbing Wall" and "all membership types"

VI.   CLIMBING WALL – BELAY CLINIC TOTALS
   a. Access "Registrations"

   b. Click on "Climbing Wall" – Belay Clinic

   c. Under "Program Offering/Instance", sort by title (which will effectively sort by date)

   d. Count the number of participants per month

VII.   CLIMBING WALL – COME GET STRONG
   a. Access "Reports" and click #27 "Usage by Hour and Day Grouped by Membership"

   b. Enter parameters (dates, access readers, membership types, times, days of the week)

        i. Access readers:
           1. Access Reader: Facility: Climbing Wall
           2. Climbing Wall Mag Reader: Facility: Climbing Wall
           3. Climbing Wall Virtual HK: Facility: Climbing Wall
           4. CW Virtual HK: Facility: Climbing Wall

   c. Membership types

        i. Belay Certified
        ii. Come Get Strong

VIII.   CLIMBING WALL – SPECIAL EVENTS (i.e. TRY CLIMB)
   a. Determine date of special event

   b. Access "Reports" and click on # "Denied Access Event Log"

   c. Select timeframe (typically 7:45 – 10PM)

d. Run report and export the file to an .xlsx document.

e. Run a search (control-F) for "CW" (for Climbing Wall)

f. Count totals under "Climbing Wall" – Access Reader and CWVirtualHK

IX. COLLECTING PARTICIPANTS AND 810/811 FOR DSA REPORTING
   a. Belay Clinics

      i. Click on "Registrations" → Outdoor Rec → Climbing Wall → Belay Clinics
      ii. Select all programs, highlight all participants
      iii. Click "Print Preview" and select the image (paper with floppy disk)
      iv. Click on "Export" and export the list as an excel file
      v. Open the excel file, freeze the first pane, and delete all columns except "name" "external ID number" and "program name"

   b. Climbing Wall Access

      i. Access "Reports" and click on # 1 "Access Event Log"
      ii. Access readers:
         1. Access Reader: Facility: Climbing Wall
         2. Climbing Wall Mag Reader: Facility: Climbing Wall
         3. Climbing Wall Virtual HK: Facility: Climbing Wall
         4. CW Virtual HK: Facility: Climbing Wall
      iii. Click on "Export" and export the list as an excel file
      iv. Remove duplicates

   c. Trip and Clinic Participants

      i. Click on "Registrations" → Outdoor Rec → Trips and Clinics
      ii. Select all programs, highlight all participants
      iii. Click "Print Preview" and select the image (paper with floppy disk)
      iv. Click on "Export" and export the list as an excel file
      v. Open the excel file, freeze the first pane, and delete all columns except "name" "external ID number" and "program name"

   d. PEDB Courses

      i. For PEDB 1070 and 1331
         1. Access the courses in Athena
         2. Log in as faculty and click "summary class roll"
         3. Copy/paste the table and delete all information other than name and 810
      ii. For PEDB 1100 and 1090
         1. Email course instructors and request name/810 for class roster

   e. Challenge Course Groups 25 students or more

      i. Challenge course managers manually collect student group rosters (via paper and pencil) during student group courses; this information needs to be logged in a database throughout the semester