

## 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](http://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