

RecChat IntelliTrac Edition – Frequently Asked Questions

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Cost

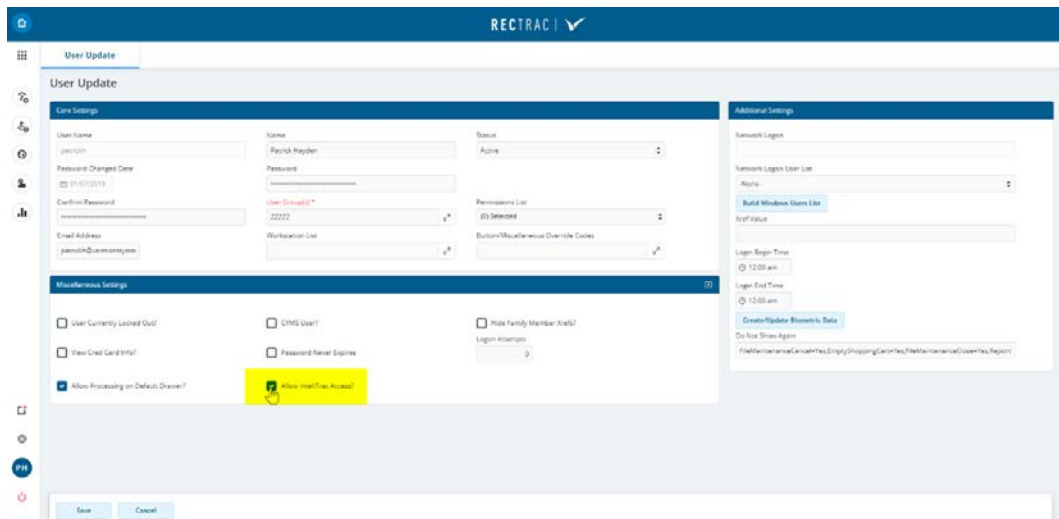
What is the cost?

IntelliTrac is a subscription with pricing based on the number of users that will have access. Please contact sales@vermontsystems.com for more information, an in depth demo, and a quote.

Access

Who has access to the dashboards?

Dashboard access is controlled by a toggle on each user that you wish to provide access to.



The screenshot displays the 'User Update' form in the RecTrac application. The form is divided into several sections:

- Core Settings:** Includes fields for User Name (patrick), Password Changed Date (01/01/2019), Card/Pin Password (XXXXXXXXXX), Email Address (patrick@vermontsystems.com), Name (Patrick Hayden), Status (Active), Password (XXXXXXXXXX), Permissions List (All Selected), and Workstation List (XXXXXXXXXX).
- Additional Settings:** Includes Network Logon, Network Logon User List (Admin), Build Windows Users List, and Logon Begin/End Times (12:00 am and 12:00 am).
- Miscellaneous Settings:** Includes checkboxes for 'User Currently Locked Out?', 'View Credit Card Info?', 'Allow Processing on Default Drive?', 'CYS User?', 'Password Never Expires', and 'Hide Family Member (Xref)?'. The 'Allow IntelliTrac Access?' checkbox is highlighted in yellow.

Buttons for 'Save' and 'Cancel' are located at the bottom of the form.



Is IntelliTrac accessible in my demo RecTrac environment?

Yes. IntelliTrac is accessible in demo, but the data seen in IntelliTrac is always your live data. We are not extracting data from the demo database and are not presenting separate demo dashboards.

Can I print the dashboards?

Yes – you can get individual widgets as images, which can be printed, and you can easily turn the entire dashboard into a PDF or an image to print or save.

Can I share a dashboard with a non-RecTrac user giving them the ability to interact with the data?

Not yet. Access to an IntelliTrac dashboard requires a RecTrac account with IntelliTrac access enabled. Currently you can share dashboards to non-RecTrac users as images, pdfs, and csv files only.

Data

Is the data I'm seeing in IntelliTrac real-time data?

Not quite. As a standard, IntelliTrac data is synchronized daily. This means IntelliTrac is typically one (1) day behind RecTrac in terms of data.

If the IntelliTrac data isn't being pulled directly from my database, where is it being stored? Do I have to allocate more resources if I want IntelliTrac?

Don't worry; you won't need additional resources to use IntelliTrac. IntelliTrac data is hosted by VSI and managed by our VSI Cloud and VSI Assist teams.

How is my data transmitted to VSI for use in IntelliTrac?

IntelliTrac data is sent to VSI via an HTTPS form post initiated by a scheduled event in RecTrac. As a standard, this event runs daily in the early morning hours so the IntelliTrac database can be updated for the coming workday.



Is VSI storing PII data from my RecTrac database for use with IntelliTrac?

No. PII data is excluded intentionally from IntelliTrac. Within IntelliTrac, a user can get to a household number, but no personally identifiable information such as name, email, address, etc. is included in IntelliTrac.

Does IntelliTrac have access to my data from the past?

Yes. During the onboarding process, our VSI Assist team will work with you to determine how much of your historical data you would like in IntelliTrac. A one-time bulk export will be run to update IntelliTrac with your historical information. From then on, the daily scheduled synchronization will keep your IntelliTrac data up to date.

When I make changes to my RecTrac data are those changes reflected in the IntelliTrac dashboards (Categories, Types, Locations, Descriptions, etc.)?

Yes. Static data, such as Facility Locations, Facilities, Activities, Categories, Types, etc. are updated in full on each daily synch from RecTrac. If you change an Activity Category today, you will see it update in IntelliTrac tomorrow.

Is there any data in IntelliTrac that we cannot get from reports in RecTrac?

Currently, nearly all the data available in IntelliTrac is also available via RecTrac reports. Exceptions to this would be the household addresses converted into plot-able points on a map. Although you have addresses in RecTrac, there is no way via a RecTrac report to get your households mapped. In addition, one of the advantages of IntelliTrac is the ability to connect to other data sources. Although we have not released standard dashboards utilizing external data sources, we do have plans to incorporate other data such as:

- Census/Demographic data to allow you to compare your participant demographics with those of your population easily.
- Weather data from trusted weather sources to align your sales data with historic weather information (particularly useful for golf courses and pools).
- Google analytics data from your WebTrac site to align web utilization statistics with sales information.
- And more!



Customization

Can I create my own widgets and dashboards?

Not yet. VSI is working to add designer capabilities to IntelliTrac in 2020. Stay tuned. In the interim, **VSI Assist** is here to help with the discovery and creation of custom dashboards to fit your needs.

Can I save dashboard filters for later use?

Currently, you cannot save multiple dashboard filters for use later. However, you can save a set of filters as your default for a dashboard. Your default filters can be applied at any time and will be remembered the next time you access a given dashboard.

Misc.

I noticed during the demo that the % of capacity for enrollments was more than 100% at one point, how can that be?

We noticed as well! That is a defect that we identified, specifically with "Enroll by Day" activities. We were accounting for all enrollments across all days, but for the capacity, we were not including the sum of the Section capacity across all days the program meets. This is being addressed.