

3.1 Pre-Migration Training Plan

Welcome to your Pre-Migration training Plan. We've setup this learning plan to help you and your team get familiar with RecTrac 3.1 at your own pace after you test migration is complete. We recommend you watch the videos with your main migration team. There will be several setup options available for most processing topics, and you may want to adjust prior to letting your front-line staff into the system.

Check out our [migration Intro video \(6 min\)](#) with your team first, this will give you an overview of the migration process.

Introduction to Navigation and Daily Processing

Required Video RESOURCES

All staff should watch the standard RecTrac Lab videos as they will give users a good understanding of daily processing in the new version. After logging into your RecTrac 3.1 Test database, click on the **life preserver** icon on your left-hand side of your screen and select **RecTrac Lab**. From there you can access the Standard RecTrac Lab videos. [Accessing the RecTrac Lab](#)

In addition, you might find the below videos helpful.

[3.1 Highlights \(9 Min\)](#)

[Datagrids \(12 min\)](#)

[Global Sales Processing \(22 min\)](#)

Reporting Video Overview Series

[Running Reports 1 - Reporting Introduction](#)

[Running Reports 2 - Report Output Listing](#)

[Running Reports 3 - Report Screen Overview \(GL Report\)](#)

[Running Reports 4 - Report Templates and Scheduling Reports](#)

Follow Up Quesitons – What do you and your staff feel that you are not comfortable with after watching these videos? Are there particular processes that you feel are missing that you want to review? Make a list of the daily functions that you would like additional help with.

Admin User Training

These videos will review the most common **admin** setup topics. These are designed to provide basic knowledge so you can start to determine what items you want to adjust in your database. You may want to make some of these adjustments prior to letting your front-end users into the system.

Admin Video RESOURCES

[Module Question Cleanup](#)

Menus

Menu records control what items you can access in 3.1. Your 10.3 pull down access should have converted over with the migration, but some adjustments might be needed.

[Video 1 - Menu Introduction](#)

[Video 2 - Simple Menu Permission Setup](#)

[Video 3 - Customizing Menu Items \(Menu Management\)](#)

Questions – Are there any missing menu items? Any restrictions that are not in place that you need for certain user or user groups?

Touch POS

Touch buttons from 10.3 are converted over during the migration but the styles do **not**. You'll want to spend some time styling your screens and making sure you have all the functionality you need prior to the live migration.

[Video 1 - Touch Screen Introduction](#)

[Video 2 - Touch Screen Customization](#)

[Video 3 - Touch Profile Setup](#)

Questions – Can you customize your touch buttons in the test environment? Are there any buttons/functions that you feel are missing? Will you customize your buttons in your test database or wait until your live migration?

Supergrid

The supergrid is available in 10.3 but was not always used. The 10.3 availability calendars no longer exist in 3.1 so the Supergrid is now the primary tool for checking availability and processing reservations.

[Video 1 - Supergrid Introduction](#)

[Video 2 - Supergrid Basic Customization](#)

[Video 3 - Supergrid Daily Processing Settings](#)

[Supergrid Key \(PDF\)](#)

Questions – How many supergrid views do you need? Are you comfortable with customizing those views on your own? What additional changes do you want/need for the reservation process?

Fees

General Intro to [Fees \(12 min\)](#)

[Fees 1 - Introduction](#)

[Fees 2 - Creating Basic Resident/Non Resident Fees](#)

[Fees 3 - Moving Fees to the Activity Level](#) (Optional)

[Fees 4 - Section Bulk Change Fee Move](#) (Optional)

Questions – What fee changes are needed? (If any) If moving fees makes sense in your case, are you comfortable with that process?

Rules

General Intro to [Rules \(11 min\)](#)

[Rules 1 - Intro](#)

[Rules 2 - Activity Registration Date Solution](#)

[Rules 3 - Activity Registration Date Set Creation](#)

[Rules 4 - Activity Registration Date Set Link](#)

Reporting Video RESOURCES

[Customizing Reports 1 - Report Output Management Introduction](#)

[Customizing Reports 2 - Basic Report Customization](#)

[Customizing Reports 3 - Creating a Placeholder Roster Report](#)

[Customizing Reports 4 – Adding Question Answers to Reports](#)

WebTrac Video RESOURCES

We don't normally setup WebTrac in your test environment, but we can review any questions you might have as needed. You can also collect all of the info we'll need for WebTrac prior to your live migration. Updating to one of our newer splash page templates will be required so you have so your page will be responsive on all mobile devices.

[WebTrac Colateral](#) needed for Live implementation. (Logo, Brand Colors, Social Links)

Our current template options are [Hero Slider](#) and [Sections and Tiles](#) and [Sections and Tiles Login](#)

Image Sizes	Hero Splash	Sections and Tiles	Sections and Tiles Login
Top Large Image	1800px x 475px	1660px x 380px	350px x 350px
Bottom Boxes	350px x 350px	320px x 215px	275px x 275px

Misc Video RESOURCES

[Section Archive – Cleaning up and reusing sections \(Transfer To History\)](#)

[Code Conversions – Potential Cleanup step](#)

[Marking Items as Deleted – Potential Cleanup step after your live migration](#)

[Adjusting the Default Drawer Message in your test database](#)