



## Using Activity and Trips for Online Reservations during COVID

In response to regulations on re-opening facilities across the country, VSI has produced a few options to allow patrons to reserve time at your facilities while allowing you to adhere to capacity limits. This document provides guidance on two (2) good options that can be used with WebTrac 3.1 to automate the reservation process for your patrons. Review this information and determine whether a workable solution is in your RecTrac environment.

### Activity

With the Activity Module, you can build an activity for each space you wish to use upon reopening. After building the activity, create a section under it for each time block, and set the section to "Enroll by Day." To reserve a time slot, patrons simply register for the section on the day(s) they want. Guest registration *is not allowed* with this solution. Patrons must have a household in your RecTrac database or they must create a new one before they can register.

### Setup Steps

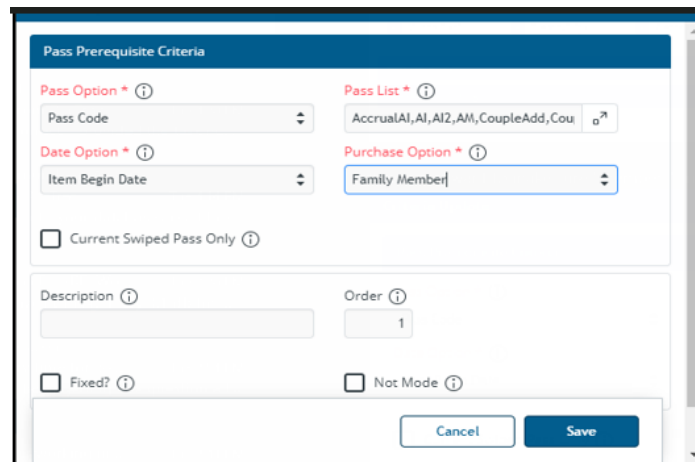
- 1** The first thing to do is create a parent activity record for the space you wish to use. *For example, you have a skate park. You would create a skate park activity, such as WEBSKATE.*
- 2** Once the parent record has been created, create individual sections for EACH time block you will be offering. Use the Description fields to denote the time block. *For example, if you were doing hourly time blocks from 9:00a – 12:00p and 1:00p – 5:00p at the skate park, you would end up with seven (7) sections under the Skate Park activity, one for each hour, such as 900a WebSkate Entry, 1000a WebSkate Entry, etc.*
- 3** The End Date for your sections can be as far into the future as you like. *For example, 2025.*
- 4** Set the maximum count for each section to the mandated capacity of your space at any given time during the day. *For example: if you're allowed 10 people in the skate park at any given time, then you would set your Maximum Enrollment Count to 10 for each section in the skate park activity.*
- 5** When setting up your sections, be sure to enable the *Allow Enrollments by Day* option. This allows you to manage a roster for each day. When members use WebTrac to reserve a time block, they will be prompted with a calendar to select the days they want at that time block. An example image appears below.



- 6 Finish setting up fees and rules as you normally would.
- 7 Repeat these steps for each space you intend to use. For example, you have a recreation center, a GYM, a pavilion, and skate park. You've already created the activity for the skate park space. You would repeat these steps for the recreation center (WEBREC), the pavilion (WEBPAV), and the GYM (WEBGYM)..

### Special Considerations

You can **limit registrations to members only**, if desired. To do this, simply create a Pass Pre requisite rule.



Optionally, you can **create a new Visit profile that allows "Activity" visits only**. Your patrons can swipe their regular membership card or key fob, but the visit will be denied unless they are registered for an activity that meets at the location within a certain time frame.

The **Visit profile • Capacity group** has built-in options for **tracking overall capacity** at the location where it is linked. When capacity is reached, you have the option to "warn" or "stop" visit processing until capacity is reduced.

If you want to **track which patrons are showing up for their reservation** (and which are not), enable the *Record Visit Attendance* option on your sections. Changes may be needed to your Visit profile(s) as well. Refer to: [Topic Doc - Activity Visit Processing](#).

If you are concerned some patrons may be **staying too long** (i.e. past their reservation block), enable the *Track Visit Swipe Out* option on your passes and remind patrons they must swipe in *and* swipe out. You can run reports that show sign out time by individual.

**Access Tickets can be added in any module** and provide a good option for limiting access to your facilities. When patrons register for an activity, Access Tickets creates a scan-able/swipe-able ticket for each session. *For example, Elroy Jetson signs up for the 11:00am hour at the Skate Park on Monday, Tuesday, and Thursday. Along with the receipt, Elroy will get three (3) Access Tickets, one for each time block. To gain access to the Skate Park at the appointed time, Elroy will have to swipe the proper ticket during pass visit processing to get access. If opting to use Access Tickets, VSI advises you to link them at the Activity Level of hierarchy.*



## Reporting

Enroll By Day Roster

Activity Fees Report

Activity Visit Report



### Activity Roster Report (Enroll by Day)

Activity\_Section: ComboKey 340148\_02 Before & After School 2  
 Meeting Date: 02/10/2016  
 Time: 7:00 am - 6:00 pm  
 Location: Chelsea Recreation Center

Section: Max Count: 25 Enrolled: 3 Waitlist: 0 Status Active

Instructor(s):

Name	Gender	Primary Phone	Primary Email
Emily Bledsoe	4.75	Female	(623)523-8587 ebledsoe@suns.comx
Kiera Johnston	22.17	Female	(802)434-5988 kayakji@gmavt.netX
Mary Allendorf	0	Female	(802)899-2823 ssounds@together.netX

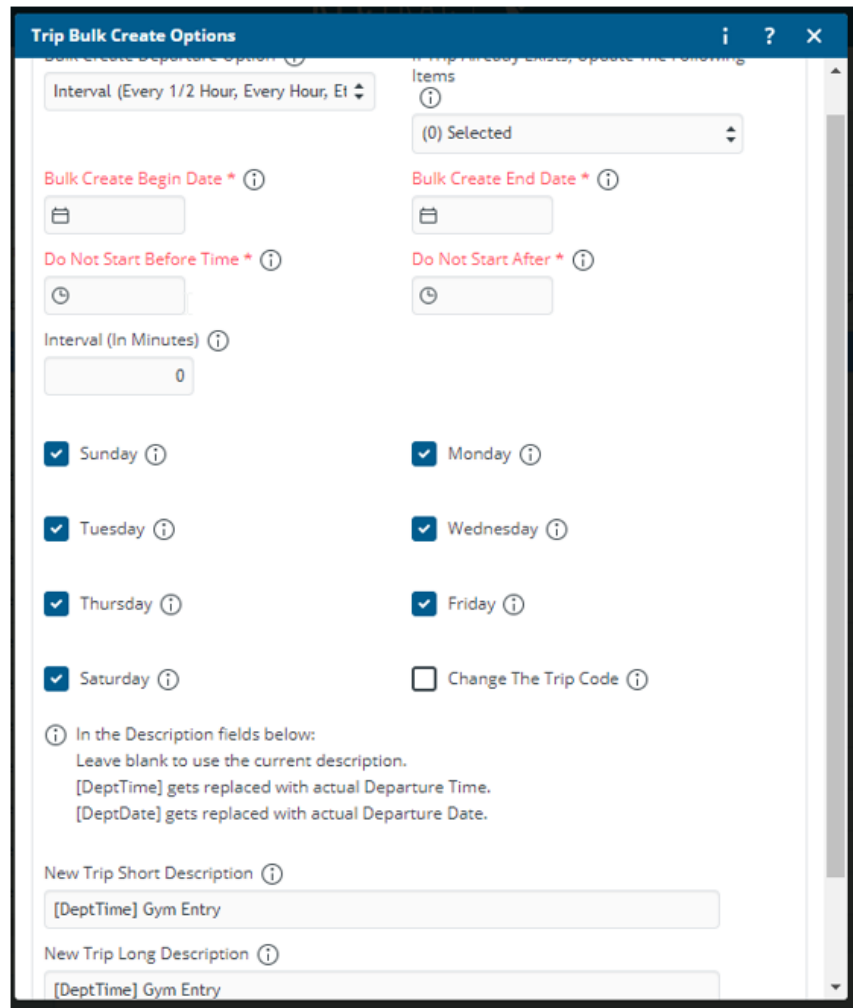
## Trips

With the Trip Module, you can build a trip for each space you wish to use upon reopening. After building the base trip, use the Bulk Create utility to make a new trip for each time block on each day going forward into the future. To reserve a time slot, patrons simply register for the trip(s) they want. Guest registration *is allowed* with this solution.

## Setup Steps

- 1 First, create a trip record for the first time block at a space you will be offering. The code should be something that makes sense to your situation. *For example, you have a GYM. You might name your trip, "WEBGYM."*
- 2 When creating the record, start both your *Short Description* and your *Long Description* start with the opening time for the block. *For example, 900a WEBGYM Entry.*
- 3 Make the *Departure Date* the first day you plan to offer you plan to offer online reservations.
- 4 Set the *Max Count* to the number of people who can occupy this space at one time.
- 5 Set up the fees and rules as you normally would.
- 6 After you have created the first record for the first trip, highlight it and select **Bulk Create**.
- 7 Change the *Departure Option* to "Interval" and then select the dates and times you will be offering this space. Use minutes for the interval (i.e. 60, 90, 120, etc.)
- 8 Lastly, go to the *New Trip Short Description* and *Long Description Fields*. Enter "[DeptTime]" (no quotes) and the trip name. *For example, [DeptTime] WEBGYM Entry.* When you run the Bulk Create, the system will auto fill the departure time for you in *Short Description* field.

- 9 Repeat these steps for each space you will using. For example, you have a recreation center, a GYM, a pavilion, and skating park. You've already created trips for the GYM space. You would repeat these steps for the recreation center (WEBREC), the pavilion (WEBPAV), and the skate park (WEBSKATE).



**Trip Bulk Create Options**

Interval (Every 1/2 Hour, Every Hour, Et)

Items  
(0) Selected

Bulk Create Begin Date \*

Bulk Create End Date \*

Do Not Start Before Time \*

Do Not Start After \*

Interval (In Minutes)

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Change The Trip Code

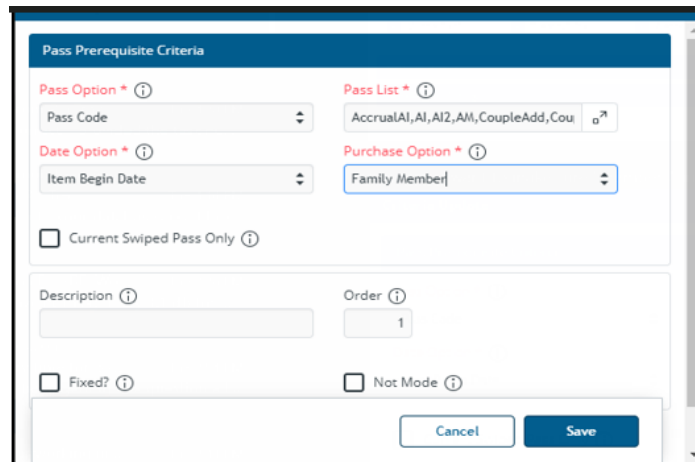
In the Description fields below:  
 Leave blank to use the current description.  
 [DeptTime] gets replaced with actual Departure Time.  
 [DeptDate] gets replaced with actual Departure Date.

New Trip Short Description  
 [DeptTime] Gym Entry

New Trip Long Description  
 [DeptTime] Gym Entry

## Special Considerations

You can **limit registrations to members only**, if desired. To do this, simply create a Pass Prerequisite rule.



The screenshot shows a web form titled "Pass Prerequisite Criteria". It contains several fields and checkboxes:

- Pass Option \*** (dropdown menu): Pass Code
- Pass List \*** (text input): AccrualAI, AI, AI2, AM, CoupleAdd, Cou
- Date Option \*** (dropdown menu): Item Begin Date
- Purchase Option \*** (dropdown menu): Family Member
- Current Swiped Pass Only
- Description** (text input):
- Order** (text input): 1
- Fixed?
- Not Mode
- Buttons: Cancel, Save

**Access Tickets can be added in any module** and provide a good option for limiting access to your facilities. When patrons register for a trip, Access Tickets creates a scan-able/swipe-able ticket for each session. *For example, Elroy Jetson signs up for the 11:00am trip at the Skate Park on Monday, Tuesday, and Thursday. Along with the receipt, Elroy will get three (3) Access Tickets, one for each time block. To gain access to the Skate Park at the appointed time, Elroy will have to swipe the proper ticket during pass visit processing to get access.*

You can run the **Trip Roster Report** to see who will be arriving

## Watch Luc Set It Up!

VSI Implementation Consultant, Luc LeBlanc, created this short video!

<https://www.screencast.com/t/i7edunVMiDt>



## Final Thoughts

### Which Module – Activity or Trips?

Use this checklist as a starting point to see which module you should use to allow people to book time slots online. Keep in mind what modules you already utilize, and the features that you are looking for the most.

<b>Feature</b>	<b>Activity</b>	<b>Trip</b>
<i>Guests Can Register</i>		✓
<i>Registered Households Can Register</i>	✓	✓
<i>Charge Fees Online</i>	✓	✓
<i>Enforce Rules Online</i>	✓	✓
<i>Check-In Option</i>	✓	✓
<i>Access Ticket's Can Be Linked</i>	✓	✓
<i>Restrict to Member Only (Optional)</i>	✓	✓
<i>Have Pre-Set Time Blocks</i>	✓	✓
<i>Run a Roster Report</i>	✓	✓
<i>Mobile - Friendly</i>	✓	✓

1. When selecting a module, keep in mind the whole process. The sale online, the reporting, and the check in process
2. Think about modules that you already use, the set up may be easier with a module you are familiar with
3. Think Mobile! When setting these new options up for your patrons, look at it from a mobile perspective.
4. Keep Reporting in Mind! You will want to know how many people are taking advantage of this feature!
5. Think about the check in process. Are you going to utilize an access ticket option?



<b>Feature</b>	<b>Activity</b>	<b>Trip</b>
<i>Calendar View</i>	✓	✓
<i>Listing View</i>		✓
<i>Need Module License</i>	✓	✓
<i>Anticipated Setup Time</i>	30-60 min	30-60 min

6. Think about the check out process, are you going to make people leave after their designated time? Do you have to space time blocks out to account for a transition?

## Licensing

In the event you want to use a module you do not own, please [contact VSI Sales](#) for pricing options and a quote.





## RecChat Spotlight: Reserving Time at Facilities during COVID

### General Questions

When today's session is done, will you share the video?

Yes, this will be available afterwards. All RecChat videos are posted to <https://support.vermontsystems.com/support/RecChat/>

Will you be discussing best practices or suggestions for those of us who do not use online reservations, registrations, or payments?

The setups we're talking about today are not limited to just WebTrac. Everything being shown can be processed in-house using RecTrac.

Is there a way to allow a person to cancel their own reservation & receive a refund? Can we set a deadline, such as 24 hours in advance or something like that?

WebTrac usually is configured to not allow cancellations, but it is possible to enable this option. To do so, go to the Daily Processing profile. There should be a setting to allow cancellations for the modules you choose. When this is enabled, there should be a cancel option under My Account, when patrons log in to WebTrac.

The Payment profile would control what refund options we will give the customer.

Can a patron cancel their reservation?

Not by default, but you could allow cancellations if you wanted to.

Are we able to use this as appointment scheduling for tours and/or front desk appointments for other departments?

Yes, this could certainly work for a wide range of applications. Trips may also be valid to do that. Your "class" descriptions may just need to be specific enough. Maybe you have some quick links that do the search criteria for people.



Note: Activity registrations require a household in RecTrac, but Trips can be booked as a guest.

In Activity, we can make a membership rule for enrollment. We set all memberships to Suspended status. Can the system auto-activate their membership when they register?

No. The pass will need to be valid/active to satisfy the criteria. This is true regardless of what module you're working in.

Do you think there will be any issues since so many people will be trying to register at the same time when registration opens?

That is a tricky one. I do not think this will create a huge load on your system/WebTrac. I have not heard of other departments having any load issues when they launched.

What is the best way for reserving pool lanes? Activity or Trip? For example, Lane 2 in the large pool?

I would suggest using Activities as it provides more flexibility and less setup than Trips.

## Activity

Just to clarify: basically enrollments by day is kind of treating each day as a separate activity/roster?

Correct, with enroll by day, each single day has its own roster because you are not required to attend the entire class. Just the day you sign up for. There are unique reports for this.

How does the enrollment by day look in the section inquiry?

Looks no differently. When viewing each day, there is the Enrollment Count button that you will need to use to view each day's enrollments.



We set up 2-hour daily blocks using POS Tickets. Is there any benefit to setting it up as an Activity instead?

Activities take less time, and with the enroll by day toggle, you would be able to quickly reuse sections for enrollment.

Can you limit how many days/times a patron can register for?

Yes, you may create a rule that limits the number of registrations are allowed.

A major concern of ours is people monopolizing the schedule. How can we prevent this?

Add a rule to the Activity with an advanced criteria to set restrictions on how many days a patron can sign up for over a certain time frame.

Can it be set up to know whether someone registering for work out time has a health club membership? We would only be open to members.

Yes, you can have a rule based on valid Pass memberships.

Is there a way to see multiple time blocks in the same calendar by day option?

The time blocks are just the dates/times you setup for the Section(s). Just a matter of making them as needed.

Suppose we have several "areas" set up – pool and fitness, for example - and we still want to restrict to one visit in one area per day. Can this rule be applied to cover across both activities?

You set the Item Category, so if they all share the same activity Type, etc. it would apply.



Is there a way to have daily enrollment toggle work for different same Activity that takes place at different times on different days? For example, Drop-in Hockey takes place at 6 am on M/W but at 12 pm on T/R. And can you alter individual days, e.g. push a single session back 15 minutes

You would need to create different sections if there are different time variables.

Is there anything that would keep a patron from logging off and back on again to acquire another registration?

You can restrict them if using the Activity module. You can set max registrations per day or per week or per facility.

If they completed their enrollment by day registration. When they come back to the same class will it allow to register again for additional dates on the same program numbers or will it say a duplicate enrollment?

The enroll by day toggle will let them register for multiple dates without flagging them as a separate enrollment.

Can the activity be linked to visit check-in?

There is, here's the topic doc to setup:

[https://demoapps1.vermontsystems.com/wbwsc/vsidemort.wsc/help.html?file=/Topic\\_Docs/t\\_d\\_a\\_r\\_visit\\_processing.html](https://demoapps1.vermontsystems.com/wbwsc/vsidemort.wsc/help.html?file=/Topic_Docs/t_d_a_r_visit_processing.html)

Do we need to set any fee as "Daily" instead of flat with the daily enrollment?

You can just use the flat fee, and RecTrac will charge that fee multiplied by the amount of reservations.



If there are different hours on the weekends, do you have to create a separate Activity?

Not necessarily. While you could create a new activity, the better option would be to create a custom schedule unique to the dates/times.

If we wanted to limit users to one visit per week (for example) would that setting be floating days? That way it is a fluid week versus the standard week options?

Yes, that would be a floating day setting for a week from the last purchase.

Somewhere along the line we removed the "Allow Enrollments by Day" option from Activity Section Update. How do we go about adding it back? Menu Management?

This would be done in Management Screen management under the Activity Section Update screen.

In Activity, can you have a roster max for the whole building (activity number), but divide that between different sections?

Yes and No.

No. You cannot divide overall building capacity between *Sections*.

Yes. You can use Advanced Enrollment Count settings to link multiple *Activities* together. They use one total enrollment count and limit across all the *Sections* in each *Activity*. This is set at the *Activity* level.

Is there a cheat sheet for patrons on how to use the enrollment by day feature or would we need to create one?

This would need to be created manually based off your configuration.



## Is it possible to get a Roster per day report?

You would use the VSI - Activity Roster Report (Enroll by Day) report under Activity Enrollment Reports.

Can one family member register for other members of their HH for time blocks as well. For example, if they want the whole family to go to the pool, they can reserve a slot for each member.

Yes, you can only link one family member to each time slot reservation you make.

Is there a means to set up "clean up" or "set up" time between intervals or set it up so that if someone takes one-time block, the block immediately after becomes unavailable? For example, if we have hour long time blocks, and someone makes a reservation at 9am, can 10am be blocked off so no one can make a reservation?

Not automatically after a booking. You would need to schedule block times manually, so all blocked off time would need to be predetermined.

## Trips

Do you need the Trip module to set these up?

Yes, you will need the module. A free trial is available. Please [contact Sales](#).

We do not have the Trip module. What kind of pricing is that? Is there special short term COVID pricing just to have it for a while? I like the "no household" option in trips.

[VSI Sales](#) is certainly trying to work with customers. We can turn it on for 30 days and see if you like it, etc.



Is there an advantage to Trips over Tickets? Tickets also allow them to purchase as a guest and we can still require some basic info and print out a list.

These modules are similar. The disadvantage is there is no bulk create for tickets, where trips, you can make a while month within a few minutes.

Are we able to change the wording on "total headcount" if we decide to use the Trip module?

We may be able to change that using screen design although that will only change the wording on the processing screen. The receipt would still say "headcount"

Can members use a Punch Pass for Trip visits?

No. Trips does not offer this function at this time.

Are you able to have multiple rates in the Trip module?

Yes, you can create different rates for the time slots.

In Courts there is a bug with wavier code, and you cannot do a max past four (4). Does Trips have any known issues with these two things?

Those are limitations to courts only. Trip waivers are in working order and you should be able to sell as many at a time that are available unless restricted by rules.

With the interval and Trips, is there a way to put in a break in between the intervals for cleaning the facility?

You could run the bulk create program multiple times to manually create breaks. You would not be able to do this in one run.

Can you put a limit on the headcount?

You can setup rule using Headcount criteria on the Trip to limit.



Is it possible to get a time slot roster report on trips?

Yes. There are various outputs you can look through to your liking.

## Other Modules

Is there a reason you WOULDN'T recommend using the Rental module and creating facilities with time blocks and a rental type of Quantity to control capacity? We have been spending a lot of time configuring this. Not sure if you could comment on why NOT to do it this way. Thanks for doing this, guys!

Rentals with Capacity would likely work well. We just tried to narrow down the options a bit. We know others have gotten POS Tickets working well.

What about the Facility module for pool lane reservations?

You could use that module for pool lanes if only one person is allowed to be in a certain space at a time. Facility only allows one (1) household to reserve a space. For example, if one person only is allowed in the pool at a time, then that would work. If four (4) people are allowed in the pool at a time, then that wouldn't work, unless you made four (4) "pool" facilities.

Activity and Trip allow more than one reservation.

I was able to set up this issue for us using Facility, although we are not using it yet, is there a reason you are not offering that as a suggested option?

The one downside is only one person can book a slot with Facility module.

Can you see a downside to using Courts for this? It is a module we have, and I think would still work.

The downside is that Courts seem to only allow a max of 5.





## Fees and Rules

With fees, can you charge different rates based on ages?

Yes, just use the Age Criteria for each fee to set the different age rates.

Is there a rule that we can create that when a person reaches a certain payment threshold, that the rest of the sections/time slots would be free for the month?

You can put an advanced criteria on the fee itself that would give a discount until a certain amount of time slots have been reserved.

For fees, when you say "flat," are you saying that we set-up the fee as a flat daily fee? For example, one registration is \$6 and that is the fee?

The fee would just be a flat fee, and RecTrac would know it would be \$6 for every time slot.

Is there a way to set up a rule in RecTrac that might enable a 24-hour break between reservations for a campsite or cabins while still handling reservations online? For example, if a customer makes a reservation, there is a 24-hour period after the reservation they cannot make another reservation.

Yes. You should be able to use a rule with an advanced criteria that would limit someone from making a reservation <X> number of hours after the previous reservation.

## RecTrac 10.3

Can this be used for those of us still on 10.3?

The Trip module is valid, but the setup is a bit different. For Activity, you might look at using Day Care.



So, if we are on 10.3 and do not have the Trip Reservation module, will there be any useful information in today's RecChat?

I do not think you would be able to take what you see today and jump right into 10.3 and try to set it up. I believe [VSI Sales](#) would work with you on test driving Trips in 10.3 if you wanted to try it out, etc.