

RecTrac 10.3 to 3.1 Upgrade Steps

12/10/2019





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10.3 to 3.1 Upgrade Steps

Live Migrations: ALL steps in this document are required.

Test Migrations: Only those steps marked ****TEST**** are required.

10.3 Server/Pre-Upgrade Steps – Completed In Advance by Customer:

- 1 **TEST**** Consider purging old data prior to the upgrade to speed up the conversion process. Refer to the Topic Doc – Period End Processes by using F1 help in RecTrac 10.3. Search for “End of year”. Purging old Pass Visit, POS History, Court Reservations and Tee Times can have a significant impact on the size of a database and the time it takes to convert.
- 2** Import any outstanding WebTrac Batch households prior to upgrade.
- 3** Run a Household Trial Balance report in 10.3 for all Debit and Credit balances from Reports • Global • Financial Reports. Save this report. Then, run a Household Balance Recalc for all households in 10.3. Re-run the Household Trial Balance. Review and address household balances that have changed.

There may have been incomplete transactions processed in 10.3 which resulted in a household balance appearing as one amount when it was truly something different. The 3.1 upgrade, in essence, recalculates all household balances. It is best to address these discrepancies sooner rather than later.

- 4** Run the Family Member Links report in 10.3 from Reports • System • Household Reports. Review for bad links (for example, mother linked to daughter in other HH). Family member links should only be linking the SAME person across two households. Clean up in 10.3 prior to the conversion as the upgrade will create/merge to only one person.
- 5** Run BadPrimary.r in 10.3 from Utilities • System • RecTrac Quick Fix Processor. This will create a BadPrimary.csv file in the Utilities • System • RecTrac File Explorer under \All Files in RecTrac Database\preupgrade. Review this file. Households listed are ones where the Primary/Secondary Guardian names are not found in the list of family members (for example, Primary Guardian = John, Family Member = Jon). The result after the conversion



will be duplicated members so these must be cleaned up in 10.3 before the conversion is run. The program can be downloaded from the FTP site in \File Updates And Drivers\RecTrac\3.1\latestUpgradeFiles

- 6 Did you use Medical records in 10.3? They are OK if they put in the additional FM screens in Member Maintenance but if they are kept as questions in the Medical button on the Family member they will not get created. Run sy0601.r from Utilities • System • Custom Program Loader to move the Medical questions to proper area.
- 7 ****TEST**** Update to the latest letter version of 10.3 and perform any post upgrade steps. Documentation and updates can be downloaded from the FTP site in \File Updates And Drivers\RecTrac \10.3\Program Level Updates.
- 8 Delete any files from the rtobj and updates folders in 10.3 - Utilities • System • RecTrac File Explorer.
- 9 ****TEST**** Verify and note the Household device in 10.3 that has your correct resident/non-resident fee codes.
- 10 ****TEST**** There is no longer a master password in 3.1 and blank passwords are not allowed. Make sure the ZZZ user has a password, and that you know that password. A VT2 generated password will work as an override password.

3.1 Pre-Upgrade Steps – Performed On the Planned Conversion Date:

- 1 ****TEST**** Check VT2 Tasks – with a tag of V3UPGRAD for any current known conversion problems. Usually, the problems just create additional post-upgrade steps.
- 2 ****TEST**** Update to the latest 3.1 build. Documentation and updates can be downloaded from the FTP site in \File Updates And Drivers\RecTrac\3.1\Updates
- 3 Verify the version of Progress that 10.3 is using. If the customer is running RecTrac 10.3 with Progress 11.3 on same server that will be used for 3.1, then 10.3 will be impacted because RecTrac 3.1.08.00 build uses Progress 11.7. Progress will make updates to the ubroker and conmgr when it run. This could temporarily take 10.3 offline and manual port changes would be needed to keep 10.3 running using Progress 11.3.



- 4 ****TEST**** Grab the latest Upgrade3.exe from H:\Chris\Scripts or if outside VSI from the FTP site in \File Updates And Drivers\RecTrac\3.1\latestUpgradeFiles
- 5 ****TEST**** Have the following folders available locally on the 3.1 server for the upgrade:
 - Needed FOR the conversion process:
 - Customer's 10.3 Filesystem folder (\VSI\RecTrac103\filesystem\ILDecatur)
 - Household Import .imp files
 - Touch button images (optional)
 - Needed AFTER the conversion process:
 - Photos of members – for photo conversion
 - Receipts – for receipt conversion
- 6 ****TEST**** If using the SUPT-UPGR-V3 server, update this Google Doc to claim your environment:
https://docs.google.com/spreadsheets/d/1LnIH0Xj8gIiXqj2QqsE7B_wEIDpd6Inr78c2ZWPjtL0/edit#gid=0
- 7 In the 10.3 database – Delete/Purge the VSI News device and delete the Scheduled Event for "VSI News." If this does not happen, then the customer will not receive VSISConnect alerts after upgrading to 3.1.

Upgrade Steps:

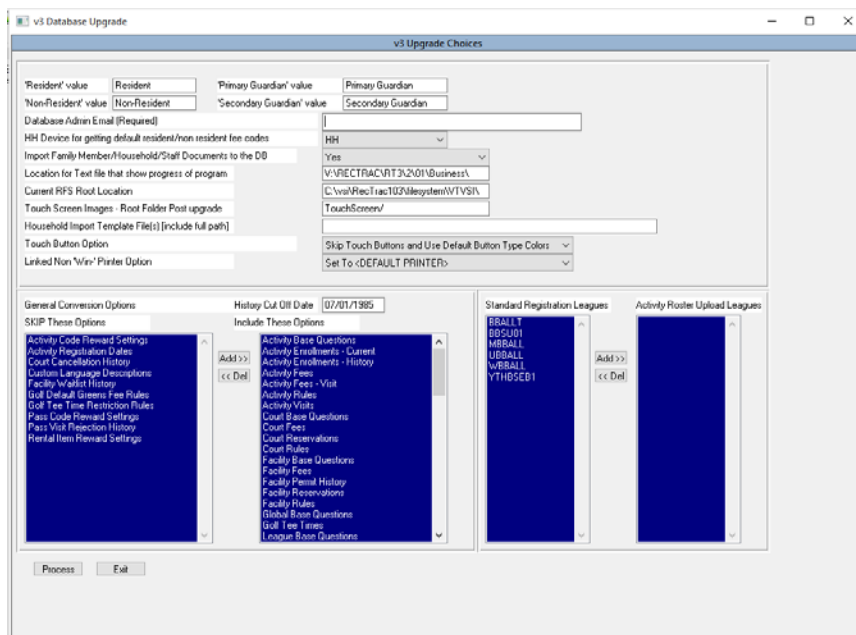
Note: Determine whether you will be using files by restoring a backup or if you are copying contents of the \RTDATA folder on their 10.3 server

Steps 1-4 are for copying the contents of the \RTDATA folder.

Start with **Step 5** if using a backup file.

- 1 ****TEST**** Stop the 10.3 database in OpenEdge Explorer 10 – <http://localhost:9090> on the 10.3 server.
- 2 ****TEST**** Stop the 10.3 WebSpeed broker wsrtlive. Set wsrtlive to not auto start.
- 3 ****TEST**** Copy the 10.3 database to the 3.1 server. These locations are suggested:
 - On the VSI SUPT-UPGR-V3 server:
 - E:\VSI3\RecTrac\Data\ENV1, ENV2, ENV3, ENV4. These folders have database engines and Appservers set up if needed).

- On the customer's server or your laptop:
 - \\VSI3\RecTrac\Data\rtdata. The location doesn't truly matter since the upgrade script is going to copy the DB from this location to \\VSI3\RecTrac\Data\UPGRADE first.
- 4 ****TEST**** Update the 10.3 rectrac.st file and repair the DB using the 3.1 DB Utilities, **selecting 10.3 database version.**
 - 5 ****TEST**** If using a backup file you can simply restore the backup to the proper ENV folder using the .st file provided. **NO** need to update the .st or run a repair, the restore process will repair the DB.
 - 6 ****TEST**** Stop any 3.1 WebSpeed brokers or Appservers in OpenEdge Explorer 11 - <http://localhost:9093>. The default username and password is "admin".
 - 7 ****TEST**** Right-click on Upgrade3.exe and select "Run as administrator".
 - 8 ****TEST**** On the welcome screen, click Next. Browse to the location of the 10.3 DB you are going to upgrade. Click Upgrade. If you are on supt-upgr-v3, choose the environment you are using and click Next to upgrade.
 - 9 ****TEST**** The v3 Upgrade Choices screen will appear. Important options are described below. Please read.

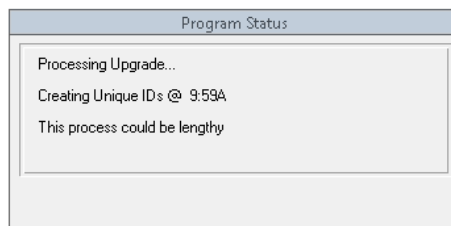


- **HH Device:** Choose the household device that has your correct resident/non-resident fee codes.
- **Location for Test File that shows progress of DB conversion:** If you are using supt-upgr-v3, change this to E:\VSI3\Temp1, \Temp2, \Temp3, or \Temp4. Otherwise leave as default.
- **Current RFS Location:** The full path to the RFS directory, accessible from your upgrade machine. (E:\VSI\RecTrac103\filesystem\ILDecatur\). Used for importing of HHDocs, StandardDocs, wbimages, and a pointer for TouchPOS images, if you choose to use them in 3.1.
- **Touch Screen Images:** Leave with the default TouchScreen/ path. Any touch buttons you want to use in 3.1 should by default get copied to \\VSI3\RecTrac\WebServer\GUI\images\TouchScreen on the DB server.
- **Household Import Template File(s):** These are the .imp files used in 10.3, and get converted/imported into the DB during the conversion. This is a comma separated list with full paths and no spaces.
- **Touch Button Option:**
 - Skip Touch Buttons and Use Default Button Type Colors (preferred). Touch bmp and jpg files will be ignored and 3.1 will give buttons different color backgrounds based on whether they are service items, tickets, inventory, visits, groups, payment, etc.
 - Link To Touch Buttons: Assumes you have images for *ALL* of your touch buttons. Not recommended.
 - Only Link To Buttons If Found in Propath/RFS: For each button during the conversion if a jpg or bmp file is found in the TouchPOS filesystem folder, the image path will be linked in Touch Screen Management, the image will be set to cover 100% of the button, and the Label will be deleted. If no jpg or bmp is found, then the conversion will leave the label and color the background according to the type of button. If customer insists on converting touch buttons from 10.3, this is the option to choose.
- **Linked Non Win-Printer Option:** Any non-Windows linked printer devices (Star, Ithaca, etc.) will be left as is or set to <DEFAULT PRINTER>. You will need to update printer profiles from the COM port or share path to the actual printer name in Windows after the upgrade, so <DEFAULT PRINTER> is recommended.
- **Module Specific Conversion Options:** Choose which fees, rules, base questions, enrollments/reservations, or history to convert or skip.
Recommended/commonly skipped items are on the SKIP side by default.
 - History Cut Off Date – Choose whether or not you wish to skip carrying over older unnecessary history.
 - Enrollments, Reservations, Memberships, etc. – Note that any household who "owed" on an item skipped will essentially have this balance cleared out.

- Module Base Questions – They are the hardcoded questions under the Add Info buttons in 10.3 Global Sales – Roster Note, Transportation Pickup/Drop-off, Pass Notes/Features/Feature Expiration Date, etc. They are easy to inactivate or delete later from Module Management or Set Management in 3.1.
- **Leagues:** Any leagues Moved to Activity Roster Upload leagues will not have their team households converted. (These are the league households in your 10.3 DB that show with the Team Names of 999999 – Team: 01, etc.) The team and the registrations that are current are still created, just not the unnecessary household.

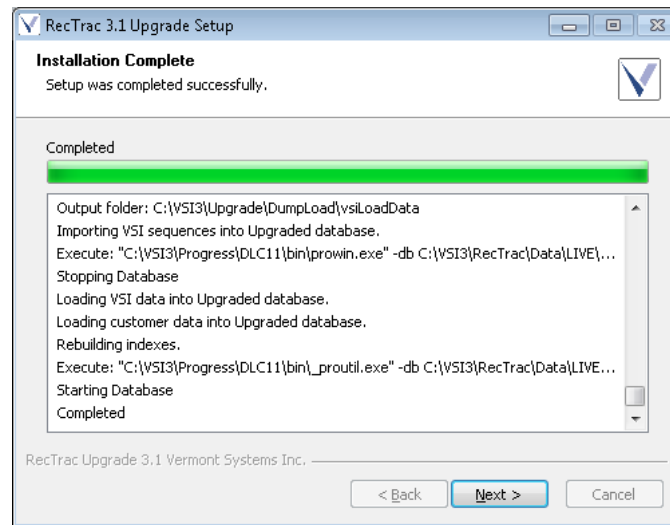
Click **Process** to begin the conversion process.

- 10 **TEST**** This part of the conversion can take hours, as it is converting all of the 10.3 data to fit in the 3.1 DB. It is normal for the Program Status window to be unresponsive.



If you're unsure of whether or not the upgrade is still running, you can check the modified date on the database files in the \\VSI3\RecTrac\Data\UPGRADE (or ENV1, 2, etc.) database directory. The temp location specified in the last step will have a V3DBConversion.log, which will be updated frequently during the conversion.

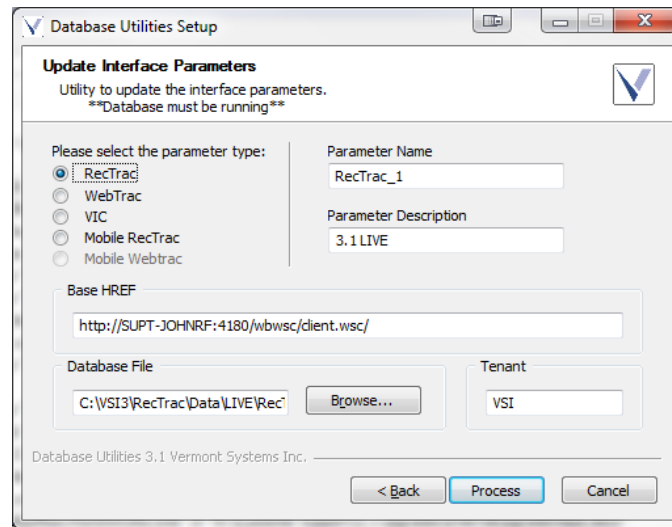
- 11** Consider taking this time to make the 10.3 DB accessible to administrators only for future reference and comparisons by locking out user accounts in the database. Copy receipts and photos to the new server. If you opted to link touch button images, copy them to \\VSI3\RecTrac\WebServer\GUI\images\TouchScreen
- 12 **TEST**** The RecTrac 3.1 Upgrade Setup program will perform additional upgrade tasks after the 3.1 conversion window closes.



Once it is completed, click **Next**.

- 13 b Move the upgraded database to the LIVE data folder and update the rec trac.st file with the new paths.
- 14 ****TEST**** Run Database Utilities from C:\VSI3\Misc or Start • All Programs • VSI3 to Repair the DB.
- 15 ****TEST**** Start the Database, CLIENT WebSpeed, and EVENT AppServer from OpenEdge Explorer - <http://localhost:9093>. The default username and password is "admin".
- 16 ****TEST**** Run Database Utilities from C:\VSI3\Misc or Start • All Programs • VSI3 to Update Interface Parameters.

Enter and select valid Base HREF and Database File paths. Click Process. Click Close when the utility completes.



Base HREFs if you are on supt-upgr-v3:

<http://supt-upgr-v3:4180/wbwsc/clientenv1.wsc/>

<http://supt-upgr-v3:4180/wbwsc/clientenv2.wsc/>

<http://supt-upgr-v3:4180/wbwsc/clientenv3.wsc/>

<http://supt-upgr-v3:4180/wbwsc/clientenv4.wsc/>

17 View the V3SkippedTDSPresets.xml file in the temp location used by the upgrade. Entries listed within were not updated to the equivalent 3.1 table/field name, and will need to be updated in Template Design Studio. If there are items that you feel should have been converted, email this to Dave Ball so he can make it happen.

18 ****TEST**** Verify you can log in to the upgraded database.

Note: If you are using the VSI-UPGR-V3 server or your laptop, log out of RecTrac, stop the database and WebSpeed engines, and zip up the database to move it to the customer's server.

19 ****TEST**** If you are using SUPT-UPGR-V3, once the database has been copied to the customer's server:

- Clean out the TEMPx and ENVx database folders.
- Remove your customer backups and ConvertedENV1ENVx.backup from the backup folder.

- Update the Google Doc and clear your environment:
https://docs.google.com/spreadsheets/d/1m7p0A8birx6CzVjx_ThlUij3GsDFMHEYRswgk6rUokY/edit#gid=0

20 **TEST** Perform post update steps.

Post-Upgrade Steps:

Note: * <Task Number> * Denotes future automation in the database conversion process. As of today, these are not automated processes and require manual configuration.

- 1 **TEST**** Check VT3 Tasks – with a tag of V3UPGRAD for any current known conversion problems. Usually, the problems just create additional post-upgrade steps.

Scheduled Events

Note: These events must run on the server where the upgrade was conducted before the database is moved**

- 1 **TEST**** The first startup of EVENTlive will run Business/V3DBConversionBulkSave.p. Check "My Events" for all users and make sure it completes. Don't stop EVENTlive until it does. This performs numerous post update steps.
The following 5 events must complete before you move the database from the upgrade server to production. This is particularly critical if DB will be going to hosted solution.
 - "RunningBalanceStartPoint"
 - "TP Enrollment Recalc"
 - "AR Enrollment Recalc"
 - "HouseholdImportRecords"
 - "V3DBConversionBulkSave"
- 2** Schedule the Photo File Conversion
- 3** Schedule the Receipt Conversion
- 4** Reschedule the Backup (ensure that the path is correct in the backup profile before doing this step)
- 5** Reschedule other reports or events unique to the customer.



WebTrac

- 1** WebTrac Parameters Profile:
 - Replace the VSI default WebTrac Template comment code (HTML Template) with the customer specific one (part of custom CSS created by Lance in advance)

- 2** Updating WebTrac Interface Parameters:
 - Run Database Utilities from C:\VSI3\Misc or Start • All Programs • VSI3 to Update Interface Parameters.
Select WebTrac and update the Base HREF and Database File paths. Click Process. Click Close when the utility completes.
 - Link the new 3.1 stylesheet (created by Lance in advance) to the new Interface Parameter under System Management • Misc Management • Interface Parameters.
 - Link the WWW user ID to the new Interface Parameter under System Management • Misc Management • Interface Parameters.

- 3** Go to the WebTrac Parameters profile and update the Forgotten Password Comment Code, if there is a Comment Code that came over from 10.3. Optionally, you can choose to clear out the field and use the default text. Discuss options with your customer.

- 4** Create Time Blocks and link to Facilities in Facility Management (otherwise facilities will not show online)

- 5** Splash Page links need to be updated with new programs.

- 6** For mobile WebTrac responsive Splash Pages, make it use the splash css file instead of the styles embedded in the Comment Code. Unless your customer has done a bunch of custom stuff it this is all you need to do, other than perhaps needing to adjust a couple of colors. Each 3.1 splash page that is responsive has a separate css file (splash1, splash14, etc.) on the L drive. In the old splash Comment Code, remove the styles (<style• - </style•) and add the line that points to the splashnumber.css file (see the HTML file for a given template on the L drive).

- 7** ReCaptcha: If the customer is using a new Server and/or URL for 3.1 WebTrac, then you need to set up Recaptcha with the new information to avoid invalid site name errors.

- 8** *126629* Create Design and Menu Design System Codes, and Screen Design and Menu Design profiles, link them to the web user.



- 9 *126629* Recreate default screen designs for Search pages from Mod3 WebTrac Parameters in 10.3**
- 10 *126639* Reenter the 10.3 Welcome message 1 and 2 from 10.3 WebTrac Parameters to a WebLogin screen design.
- 11 *126643* Adjust or create a Permissions profile with no override capabilities (otherwise fees can be reduced online)

Profiles

- 1 ID Swipe – If processing with an Input profile that used to strip a preamble from the scan, we cannot do that in 3.1, so adjust the Begin ID Position 2 instead of 1 or 0 for the cross reference.
- 2 Static Parameters Profile
 - Double check the Default Time Zone for a valid entry.
 - Organization Address – enter Admin email address for contact on failed credit card attempts.
- 3 Receipt Format Profiles
 - If 40 column printers were used in 10.3, set POS Inventory, Tickets, Service Items as Condensed (40 Column) receipt options.
- 4 Daily Profiles
 - Customers with Pass Module may want the “Effective cancellation date on Cancellation” toggle on
 - Customers with WebTrac that don’t allow cancellations may want to create a Daily Processing profile for WebTrac and uncheck all cancellation options
 - Review the model household created during the conversion. Consider linking two – a resident and non/resident for example.
- 5 Create VIC profiles for EXE and Service. VIC needs to run as an EXE for Topaz, ETS, M2Sys, and MagTek Dynamag Check Reader hardware. Install and test VIC. Use the ? link when in a VIC profile for additional documentation.
- 6 *126653*Link Credit Card – Installment Billing profiles where needed.
- 7 (RecTrac 3.1.09.03 and later) Encryption Profile – Ensure an Encryption profile is visible from Profile Management. Only one (1) Encryption profile is permitted per Database.



- 8 ETS - Pinpad Profiles (if using the ETS ERI)
 - Link new pinpad profiles (subtype of ETSDevice) with no terminal ID to workstations w/o MSR.
 - Existing pinpad profiles up to this point have required new Terminal IDs to be obtained from ETS after determining MSR type) to workstations with MSR. Call 800-834-7790 x2 or support@etsms.com
 - 0000 has been used frequently.
9. Create Open Ticket profiles and link where needed.
- 10 Access Control
 - Refer to the P:\Products\Access Control\Access Control 3.1 Installation Guide.pdf
 - Reconfigure the SmartJ, QScan, IBC 7000, or other hardware using the IBC TCP/IP utility. Items to update are outlined in the Access Control 3.1 Installation Guide PDF
 - Create access control Workstations
 - Create Access and AccessRelay profiles and link them

Other

- 1 ***TEST*** Manually rebuild the Help Index
 - Go to "?" full page Help from any program. PMPassMain, for example.
 - Scroll all the way to the right and add &clear=yes to the end. For Example:
interface=RecTrac&screen=PMPassMain&design=VSI&field=&clear=yes
 - Wait a few seconds. You'll see a red bar on the browser that says the Help is being rebuilt.
 - Close the Help browser.
 - Wait a few minutes.
 - Call the ? help from any program. You should see the proper Help for the page you're on.
THEN
 - Go to Scheduled Events Management and make sure the Help Indexing event is running. Start it if it's queued. Add it if it doesn't exist.
- 2 ****TEST**** New Gift Certificate Service Items were created for managing different Gift Certificate Codes that were in 10.3. Add a new fee here to sell gift certificates, and update Touch POS buttons used prior to sell/reload gift certificates so they point to the new service item.
- 3 Install ETS 3.0 on the event AppServer, if using the ETS ERI.



- 4 Review frequently run 10.3 reports and create new outputs in 3.1 that include what information was pulled from the 10.3 equivalent (for example, Activity Rosters that printed questions, phone numbers, and other additional info). Consider using "Placeholder" widgets for some reports to allow the easy add/remove of data to a report.
- 5 Create and link Cancellation Surcharge Fees at the module level with a fee group set to prompt
 - If in Static Parameters you have a default bill code, create module level fee with this GL, otherwise have it go back to the original GL.
- 6 ****TEST**** If using Courts set Maximum Players on Court facilities and create time blocks linked to court facilities
7. If using ODBC you must set the SQL lengths on the tables. See Help or 3.1 ODBC docs for directions.
8. If the customer had gift certificates that were unpaid for in 10.3 (not common), run "UpdateGCSales.r" through Quick Fix Processor. Program is located at H:\VSI Custom Programs\3.1\Migration Quickies.
9. Go to Interface Parameters Maintenance and toggle on the "Is This The Default Parameter For This Interface Type?" option for the primary RecTrac interface parameter (probably RecTrac_1)
- 10 League Users – Need to go into each league and update "Scores to Update". The default is 5 so adjust to 3 for volleyball and 1 for most others then run update record/standings.
- 11 Determine whether the **10.3 database** should continue running after the migration.
 - If **NO**, then set the Admin Service for 10.3 to Manual Startup type and Stop the Service.
 - If **Yes**, then set the 10.3 wsrtlive and event/timer brokers need to Manual, Start them and Stop them. and shut down. If this is not done then 10.3 Scheduled Events, such as VSINews continue to run and that updates VT2 or the 10.3 website, which can interfere with 3.1 WebTrac.
- 12 Hold Harmless is not converted to 3.1. If the customer was using a HHARM Comment Code in 10.3 (or prior), then one needs to be added manually as a Global Waiver.
- 13 Activity Section Cleanup – Run the Archive process to clean up any old sections in the database.
 - For cleanup purposes, make sure the "Create New Sections" option is disabled. Use this option only with truly old programs that will not be used again. For Example: Post-



migration you have 100 Sections tagged with the Year 2012 and Begin/End Date in 2012. These can be Archived to clean up the DataGrid and new sections will not be needed.