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LAST UPDATED:
1/29/2024

RECTRAC 3.1 CREATING A NEW ACTIVITY

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Activity Overview

Activities are items in RecTrac that are used when you:

- Want to track individual signups of patrons against a limited count of available spots.
- Have something that meets more than once during a time span.
- Want to keep track of a roster of all registered customers.

Examples of items that fit best in the activity module:

- Swim lessons.
- Runs.
- Instructional classes.
- Training classes.
- Leisure skills.
- Events

BIG NOTE

Activities in RecTrac are made up of two components.

- 1) Activity code (settings that apply to ALL sections linked to the activity code).
- 2) Sections (or classes)

Typically, the activity code is a grouping of "like" sections. Things like any waiver that is needed would be linked here since it would apply to ALL sections under this code.

The SECTION is what a customer signs up for. It has:

- Meet dates/days/times.
- Enrollment min/max.
- Fees.

The end goal with activities in RecTrac 3.1 is to put them on WebTrac so customers can sign up online. When creating them, keep in mind that they display/group by activity CODE on the web page. For example:

If I offer multiple martial arts classes I can technically add ONE activity code and then add all the sections under this code for each class. BUT, if I want them to display online with a description for each type, I need to have a SEPARATE activity code for EACH "kind" of class.

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Activity Overview cont.

To illustrate the setup with multiple codes vs. all sections under one code, here is what my activity code setup looks like for martial arts classes.

Activity Management

Options Templates (1) Refresh

Activity Code	Short Description	Type	Subtype	Department	Status	Req
JP5106					(2) Activ...	
JP5106-17-165-000	Runs	Run		Fitness Fit	Active	
JP5106-17-172-000	Wrestling	Martial Arts		Fitness Fit	Active	
JP5106-17-172-001	Fushin Ryue Karate	Martial Arts		Fitness Fit	Active	
JP5106-17-172-002	Brazilian Jiu-Jitsu	Martial Arts		Fitness Fit	Active	
JP5106-17-172-003	Judo	Martial Arts		Fitness Fit	Active	
JP5106-17-172-004	Pekiti-Tirsia-Kali	Martial Arts		Fitness Fit	Active	
JP5106-17-172-005	Taekwon-Do	Martial Arts		Fitness Fit	Active	
JP5106-17-172-007	Fitness Event	Special Events		Fitness Fit	Active	

Below is how they display on WebTrac.

- Aquatic Fitness
- Arts & Crafts
- Cooking Classes
- Culture
- Dance Class

Select All Clear Selection

Begin Month (0)

End Month (0)

Subtype (0)

Category (0)

Location (3)

Filter

- Benny Decker Theater
- Purdy Fitness Center
- Fleet Gym
- Hawk's Nest

Yokosuka Fitness Fushin Ryue Karate - JP5106-17-172-001

This martial arts was imported to Okinawa and blended with the indigenous fighting techniques of the island. The lord of ancient Okinawa and later feudal lord of Kagoshima, on the southern most tip of Kyushu in Japan, banned the use of weapons, thus giving rise to the development of "empty hand" fighting and self-defense techniques. Your participation in Karate classes will teach you correct ways to breath, exercise and stretch, increasing fitness and flexibility. Studying Karate will help you develop self-control and self-discipline enabling you to learn the self-defense moves giving you confidence and the ability to defend yourself and others.

3 Sections

Activity #	Description	Dates	Times	Days	Location	Ages	Cost	Availability
<input type="checkbox"/> JP5106-17-172-001-01-001	Fushin-Ryu Beginner Jan	01/04/2024 -01/31/2024	3:00 pm - 4:00 pm	Tu, Th	Purdy Fitness Center		\$50.00	Available
<input type="checkbox"/> JP5106-17-172-001-01-002	Fushin-Ryu Intermediate Jan	01/04/2024 -01/31/2024	4:00 pm - 5:30 pm	Tu, Th	Purdy Fitness Center		\$50.00	Available
<input type="checkbox"/> JP5106-17-172-001-01-003	Fushin-Ryu Advanced Jan	01/04/2024 -01/31/2024	5:30 pm - 7:00 pm	Tu, Th	Purdy Fitness Center		\$50.00	Available

Yokosuka Fitness Brazilian Jiu-Jitsu - JP5106-17-172-002

Brazilian Jiu-Jitsu is a martial art and combat sport that teaches a smaller person how to defend themselves against a larger adversary by using leverage and proper technique. It is a perfect self defense mechanism that focuses on grappling and ground fighting.

6 Sections

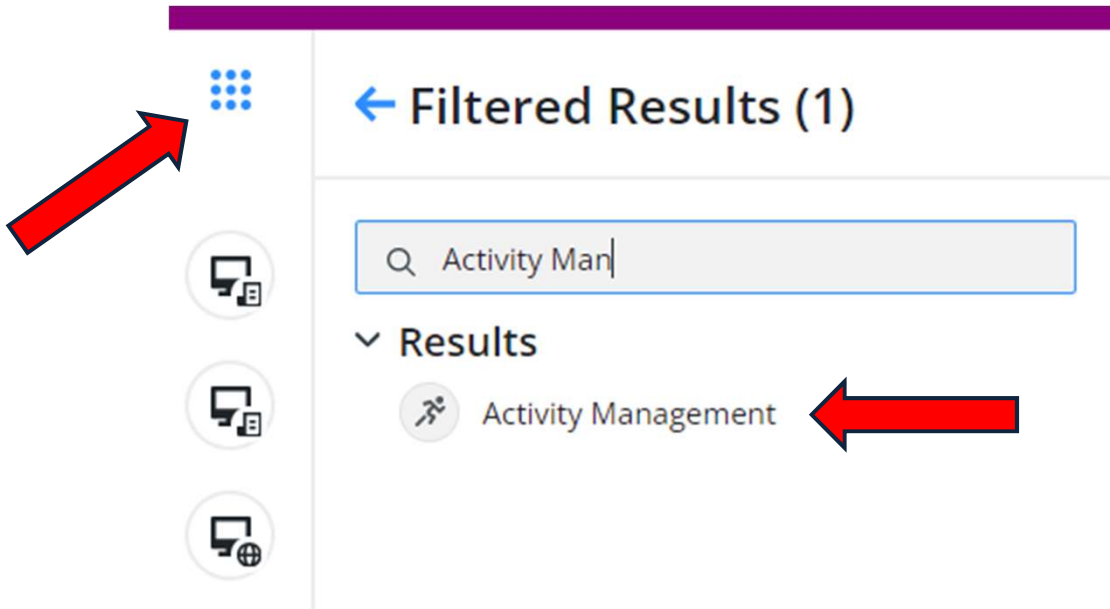
Activity #	Description	Dates	Times	Days	Location	Ages	Cost	Availability
<input type="checkbox"/> JP5106-17-172-002-01-000	Jiu-Jitsu - Kids Beginner 5-6 Yrs Jan	01/03/2024 -01/31/2024	3:00 pm - 4:00 pm	M, W	Hawk's Nest	Ages 5 -6	\$70.00	Available
<input type="checkbox"/> JP5106-17-172-002-01-001	Jiu-Jitsu - Kids Beginner Jan	01/03/2024 -01/31/2024	4:00 pm - 5:00 pm	M, W	Hawk's Nest	Ages 7 - 13	\$70.00	Available
<input type="checkbox"/> JP5106-17-172-002-01-002	Jiu-Jitsu - Kids Advanced Jan	01/03/2024	4:00 pm	Tu, Th	Hawk's Nest	Ages 7 - 13	\$70.00	Available

RecTrac 3.1 Creating a New Activity

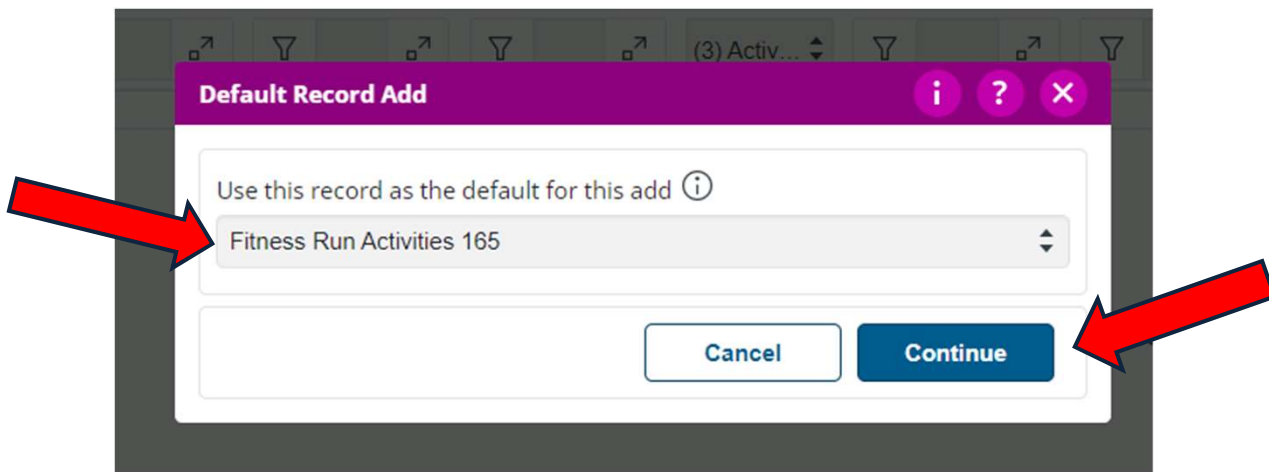


Activity Management

Step 1: To add a new activity into RecTrac, first access Activity Management. Click on the Menu button in the upper left, type 'Activity Management' and select it from the list.



Step 2: Click 'Add' at the bottom and pick an item from the list of default activities. Then hit 'Continue'.



RecTrac 3.1 Creating a New Activity



Activity Management cont.

Step 3: The following screen will display.

- Enter in the activity item code (per the coding standards document).
- Enter in the short and long description of the overall activity.
- Select you locations permission code.

Then click 'Save' when done.

NOTE: The activity item code HAS to follow the coding standards document or else the revenue for the class won't interface into SAP correctly.

Activity Update

Core Fees Rules Questions

Activity Update

Core Settings

Activity Code * ⓘ	Status ⓘ	Permissions * ⓘ
SE1234-17-165-000	Active	(1) Fitness Program Permissions
Short Description * ⓘ	Department * ⓘ	
Fun Runs	Fitness Fit	
Long Description ⓘ	Type * ⓘ	
Fun Runs	Run	
Report Tag ⓘ	Subtype ⓘ	

A waiver can be linked under 'Additional Settings'. Contact CNIC IT for help configuring a waiver.

Permissions * ⓘ

(1) Fitness Program Permissions

Additional Settings

Waiver Code ⓘ

Waitlist Comment ⓘ

Access Ticket Settings

RecTrac 3.1 Creating a New Activity



Activity Management cont.

Step 4: Now that the activity code is created, section(s) can be added to it. Highlight the activity code and click 'Section Management' at the bottom.

The screenshot shows the 'Activity Management' interface. At the top, there are tabs for 'Options', 'Templates', and a '(1)' indicator, along with a 'Refresh' button. Below this is a table with columns: 'Activity Code', 'Short Description', 'Type', 'Subtype', and 'Depa'. The first row is highlighted in blue and contains the values: 'SE1234-17-165-000', 'Fun Runs', 'Run', and 'Fitne'. Below the table, there are five buttons: 'Add', 'Change', 'Clone', 'Section Management', and 'More'. A red arrow points to the 'Section Management' button.

Click 'Add' and then select the applicable default section to add from. Click 'Continue'.

The screenshot shows a 'Default Record Add' dialog box. The title bar is purple with icons for information, help, and close. The main content area has a text field with the text 'Use this record as the default for this add' and an information icon. Below this is a dropdown menu with 'Fitness Run Activities 165' selected. At the bottom, there are two buttons: 'Cancel' and 'Continue'. A red arrow points to the 'Continue' button.

RecTrac 3.1 Creating a New Activity



Activity Management cont.

Step 5: Section Update will display. Under 'Core Settings' enter in the following information (red fields are required):

Section: Can be as simple as 001 or if you want to number them differently that's fine. YY-MM-XYZ is a popular section number syntax. eg 23-12-001, 23-12-002

Short and Long Description: Short Description: Valentines Day Fun Run. Long Description: NSA Mid South Valentines Day Fun Run. Putting the installation in the long description will help customers on the web ensure they are signing up for an event at the right base.

Facility: Pick from the list, where the class will meet.

Year: Year the class takes place in.

Season: Season the class takes place in. Select 'YEARROUND' if applicable.

Overall Max Count: Maximum number of enrollees.

Minimum Count: Minimum number of enrollees. You can run a report to show which sections aren't at this "minimum" and potentially decide to cancel the class. Leave at 0 if this doesn't apply.

Dates/Times/Weekdays: Fill these out as needed. In the example below, this fun run is on 2/14/2024 from 0900-1800 and that is a Wednesday.

Core Fees Rules Questions Comments Instructors

Core Settings

Activity Code * ⓘ SE1234-17-165-000	Section * ⓘ 001	Status ⓘ Active
Short Description * ⓘ Valentines Day Fun Run	Facility * ⓘ FIELD_SE3081-LOC_MPPFIELD	Overall Max Count * ⓘ 50
Long Description ⓘ Valentines Day Fun Run	Year * ⓘ 2024	Minimum Count * ⓘ 0
Report Tag ⓘ 	Season * ⓘ SPRING	Maximum Waitlist Count ⓘ 0
Begin Date * ⓘ 02/14/2024	End Date * ⓘ 02/14/2024	
Begin Time * ⓘ 09:00	End Time * ⓘ 18:00	
<input type="checkbox"/> Monday? ⓘ <input type="checkbox"/> Tuesday? ⓘ <input checked="" type="checkbox"/> Wednesday? ⓘ <input type="checkbox"/> Thursday? ⓘ <input type="checkbox"/> Friday? ⓘ <input type="checkbox"/> Saturday? ⓘ <input type="checkbox"/> Sunday? ⓘ		

NOTE: If a class meets multiple times a week for a date range, 'Begin Date' would be the first meet day of the class, 'End Date' would be the last meet date and then check on the days of the week in that date range the class meets.

Use the 'Class Count' button in the bottom left to check that the right number of classes are scheduled.

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Activity Management cont.

Step 6: Expand the 'WebTrac Settings' tab and determine which fields need to be filled out.

Display Section on Web: If you want this class listed online for sales, select Yes. Leaving this at No means you can skip the rest of the options here. Sections are automatically removed from the web the morning after the end date.

Keyword Search: Enter in any keywords (comma delimited) that you might apply when searching for this class on the web.

WebTrac Section Image: Browse to an image that you want to display with this section on the web. Images need to be less than 200 KB and will need to be sent to CNIC IT for them to display on the web.

Web Event: Check this toggle if you want this class to appear on the overall WebTrac event calendar.

Web Event Title: Enter the title for this class if displaying it on the Event Calendar.

Registration Web Event: Used to control WebTrac registration begin/end dates. Contact CNIC IT for help setting this up, if applicable.

The screenshot shows the 'WebTrac Settings' form with the following fields and values:

Field Name	Value
Display Section On Web	Yes
Keyword Search	fun,run,valentine
Web Section Image	[File selection icon]
Web Event?	<input checked="" type="checkbox"/>
Web Event Title	Valentine's Day Fun Run
Registration Web Event	[Link icon]

NOTE: If linking an image to a section for display on WebTrac, understand that it's the FIRST image it finds linked to a section underneath the same activity code. So if you have 3-4 sections and you want them to all have their own separate image when displayed on WebTrac, you would need to create separate activity codes, each with their own section.

And by that same logic, if you have 3-4 sections that should all have the SAME image when displayed on WebTrac, the image only has to be linked to a single section.

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Activity Management cont.

Step 7: Click on the 'Fees' tab, edit the line of fees and change the amount as needed.

Core **Fees** Rules Questions Comments Instructors

Activity Section Update

Section Link ⓘ Charge Late Fee Multiple Times? ⓘ

Options Templates (0) Refresh

	Linked To ▲	Linked Description ▲	Description	Qty	Amount	Req	Fee Type
	Section		Fitness Run	1.00	\$ 25.00	<input type="checkbox"/>	Standard

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Activity Management cont.

Step 8: Click on the 'Comments' tab. Enter in the description of the class for display on the web by either creating a brochure code (do this if this information will be used across multiple sections) OR by entering it into the 'Brochure Text' field.

A screenshot of the RecTrac 'Activity Section Update' form, specifically the 'Comments' tab. The form has a navigation bar at the top with tabs for 'Core', 'Fees', 'Rules', 'Questions', 'Comments' (which is selected and highlighted in blue), and 'Instructors'. Below the navigation bar is the title 'Activity Section Update'. Underneath the title is a dark blue header for the 'Comments' section. The form contains two main input areas: 'Brochure Code' with an information icon and a text input field with a small square icon containing an arrow pointing up and right; and 'Brochure Text' with an information icon and a 'Plain Text Editor' area consisting of three horizontal text input fields.

NOTE: If linking a description to a section for display on WebTrac, understand that it's the FIRST description it finds linked to a section underneath the same activity code. So if you have 3-4 sections and you want them to all have their own separate description when displayed on WebTrac, you would need to create separate activity codes, each with their own section.

And by that same logic, if you have 3-4 sections that should all have the SAME description when displayed on WebTrac, the description only has to be linked to a single section.

Step 9: When finished, click 'Save' in the bottom right. This section is now complete and ready for registration.