
Know What Will and What Will Not Convert Before You Make the Move to Spectrum NG

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Overview

After several customers have made the conversion from one of the CSI Software legacy products to the new *Spectrum NG*, we find that customers do not have an accurate expectation of what will and what will not be converted to the new system. *Spectrum NG* is in many ways similar to our legacy systems, namely the *Spectrum Management System*, but it is a different system. It uses different technology and we have done a lot to streamline the processes – both user-end and back-end – that caused the database structure to be very different. Fortunately, we have been able to develop translation tools that will bring most data from your legacy system into *Spectrum NG*, however, not everything is able to come over.

System Differences

Even though *Spectrum NG* is named after the legacy system and there are many similarities in functionality, there are many new features in the software and a lot of the back-end setup has been re-defined. There are some things we chose not to include in *Spectrum NG*, but many more things that we have added. For example, we have chosen not to include the *Accounts Payable/General Ledger* module, but we did include the ability for you to export your sales data into a variety of third-party Accounting packages. We did not include the *Tejas Food & Beverage* module, but we did format the normal *Point of Sale* screen for use with a touch-screen, and we included an interface to a third-party Food & Beverage package.

New features in the software include:

- More customizable *Security* permissions – you can now create and name as many *Security Groups* as you would like, and you can set Site Administration permissions by group as well
- A *Forms Management* module – this allows you to upload files from your computer to attach to a member's account which you can download and view any time you would like
- A complete *Letter Designer* – this allows you to create custom letter templates for a variety of system-generated correspondence, including 30, 60, and 90-Day Past Due Letters, Credit Card and EFT Decline Letters, Member Renewal Letters, and more. Many letters that were hard-coded in *Spectrum Management System* need to be re-created in the Letter Designer in *Spectrum NG* so you can customize the text and format of the letters.
- Much more expanded *E-Mail* capabilities – including the ability to insert images, format text, and include attachments
- Adding *Service Agreements* to specific items – this allows you to attach specific terms and conditions to the sale of certain items, and you can capture the member's initials and/or signature acknowledging these terms and conditions electronically.

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- More expanded *User-Defined Fields* – in addition to the Text fields and Date fields you could use in the legacy system, you can now add Number fields and Combo Boxes (Drop-Down Menus). You can also make specific fields required.
 - Multiple *Billing Groups* – give your members the flexibility to choose when they would like to be billed within the months.
 - A powerful *Query Builder* tool – this expanded upon the legacy *Report Writer* in that besides the ability to generate Membership reports, you can now create Sales Reports, Repetitive Reports, Attendance Reports, and Product Reports.
 - Redesigned *Student Download* tool – The process of importing student data into *Spectrum NG* has been completely re-designed and is now known as *Account Upload*. The format of the file itself is similar, but the process that imports the data now runs as a Service on the server itself. This eliminates the need for a user to be logged in to Windows and running an application to import the data. You can configure your import options within *Spectrum NG* itself and the server will then automatically search for files you place into the specified folder. Also, if your data is hosted by CSI Software, you will still be able to upload the data to *Spectrum NG* by saving the data file into a secure FTP folder.

What all of these changes mean to you is that after your data gets converted over, you will need a lot of training to learn what the different setup options allow you to do and audit the setup screens to make sure the system is configured the way you need it.

Hardware Changes

With technological advances in the software also come technological advances in the hardware peripherals used in conjunction with our system. There are new devices available now that can be leveraged with *Spectrum NG* to help make your business and your customer experience run smoother. Unfortunately, this also means that some devices that were used in our legacy system are no longer supported in *Spectrum NG*.

These devices can no longer be used with *Spectrum NG*:

- **Star Receipt Printers** – the only supported printers with *Spectrum NG* are now the Epson TM-T88III or TM-T88IV
- **Star Cash Drawers** – since cash drawers are specific to the printer manufacturer, if you switch to the Epson printers you must also switch to an Epson-compatible cash drawer
- **Axxis Netcams** – Customers who ran our legacy product in a Citrix or Terminal Services environment* would use the Axxis Netcam to take member pictures. These cameras are no longer supported in *Spectrum NG*. You may only use a USB camera attached directly to a PC. Alternatively, you may use a third-party program to capture and save the .jpg image from the Axxis Netcam and Import that picture to the member's account in *Spectrum NG*.
- **Signature Capture Pads** – the serial-port signature capture devices that were used with the legacy system will not work with *SpectrumNG*. We now use the *VeriFone MX-870* signature capture device, which allows you to display text and

images on its screen in addition to capturing the signature. We use this to display the text that the customer is agreeing to for them to review before signing. These capture pads also serve as magnetic card readers, so you can use this in lieu of the IDTech MiniMag readers if you would like.

Most customers who used Citrix or Terminal Services did so because it meant you only had to update the programs on one machine (the server) when new updates were available. **Spectrum NG automatically updates itself on all workstations in a “hands-off” deployment when new updates are available, so Citrix and Terminal Services are no longer required.*

These devices will work with **Spectrum NG**:

- **IDTech MiniMag magnetic card swipe readers**
- **Metrologic bar code readers**
- **Epson TM-T88III or TM-T88IV Receipt Printers** – You will need to get the Epson Advanced Printer Driver to open the cash drawer
- **Epson-compatible Cash Drawers**
- **USB Web Cameras**
- **Finger Print scanners**
- **Serial Port scanners**
- **Door/turnstile relay devices**

If you have questions about whether or not your device will be compatible with **Spectrum NG**, please consult with your Account Manager. They will be able to tell you whether or not it will work. It is a best practice not to assume that anything not listed here will work.

What Will Convert

In general, most data that has been entered will convert. The configurations on the various setup screens will not convert, as these are where the most differences lie. There are options in **Spectrum NG** that were not in the **Spectrum Management System**, so therefore no conversion is possible.

Here is a list of the items that will convert:

- **Chart of Accounts** – includes *Groups, Departments, Major Accounts* and *G/L Chart of Accounts*. This does not include any G/L transactions or past A/R to G/L Postings. **Spectrum NG** does not contain an Accounts Payable/General Ledger module, so therefore no G/L transactions can be converted. You will still be able to Post A/R to G/L in **Spectrum NG** and export the posting totals to a variety of third-party Accounts Payable/General Ledger software packages
- **Product Categories**
- **Inventory Products** – including *Inventory Counts*.
- **Non-Inventory Products**
- **Gift Card Products**

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- **Payment Types**
 - **Membership Types** – you will need to review the setup for these. There are some additional options on the Membership Types that allow you to automatically add repetitives and initiation fees for sub-members which you may wish to use.
 - **Locations** – if you are in a multi-site environment, you will want to make sure that like locations are named the same across all sites. Locations are Corporate-wide in *Spectrum NG*, so you will now only have one “Front Desk” location in the database instead of a “Site 1 Front Desk” vs. a “Site 2 Front Desk”. Sites are still separate, but we found that most companies used the same location names across all sites, so we made it a Corporate function so the locations only need to be entered once.
 - **Workstations** – these are still Site-Specific and will use the Locations that are now in Corporate.
 - **Employees** – includes *Employee Codes, Employee Notes, Employee Roles, Employee Vacation, POS Operator Passwords, and Employee Pictures.*
 - **User Permissions** – options and groups that were in the legacy system will come over, but you will need to audit this setup as there are many more security options in *Spectrum NG* than there were in the legacy products.
 - **Bank Setup**
 - **Payment Type -> Bank Assignments**
 - **Point of Sale Workstation options** – you will need to audit this setup – there are more options in *Spectrum NG* than there were in the legacy products.
 - **Check-In Setups** – you will need to audit this setup – there are more options in *Spectrum NG* than there were in the legacy products.
 - **Club Activities**
 - **Series Sales** – Series Sales products will come over, as well as any packages already on members’ accounts with the number of outstanding sessions remaining. If the Series Sales revenue was deferred in the legacy product, it will continue to be recognized according to the usage of the sessions in *Spectrum NG*.
 - **Installments**
 - **Deferred Revenue Schedules**
 - **Gift Cards** – including the outstanding value and redemption history.
 - **Members** – including *Sub-Members, Member Notes, Member History* (converted as *Member Notes*), *Member Comments, Member Messages, Member Pictures, Repetitives, A/R Balances, Transaction History, and Check-In History.*
 - **Responsible Parties**
 - **Guests**
 - **Prospects** – including Prospect Actions.
 - **Program Registration Setup** – including current and historic enrollments. You will need to audit this setup as there are many more options in *Spectrum NG* than there were in the legacy products.
 - **Scheduler Setup** - including current and historic bookings. You will need to audit this setup as there are many more options in *Spectrum NG* than there were in the legacy products.

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- **Spa Setup** - including current and historic bookings. You will need to audit this setup as there are many more options in *Spectrum NG* than there were in the legacy products.
 - **Billing History** – including past member statements.
 - **Site Parameters (formerly A/R) Setup** – you will need to audit this setup as there are many more options in *Spectrum NG* than there were in the legacy products.
 - **Statement Setup** - you will need to audit this setup as there are many more options in *Spectrum NG* than there were in the legacy products.
 - **Guest Passes**
 - **Tax/Service Charges**
 - **Category Tax**
 - **Member Category/Codes** – setups and assignments.
 - **Prospect Setup**
 - **User-Defined Fields and UDF Page Setup** – includes data in the UDF's.
 - **Program fees paid at time of registration**
 - **Program info attached to people or receipts**
 - **Deferred revenue from gift cards**

What Will Not Convert

Unfortunately, there are some things that cannot be converted. There are some modules (like the **Accounts Payable/General Ledger**, **Health & Fitness**, and **Tejas Food & Beverage** modules) that we chose not to include in the *Spectrum NG* product, and therefore that information cannot be converted. There are others, like **Event Management** (formerly **Facility Management**), where the new module in *Spectrum NG* is so vastly different that there is no way we could translate the data from one to the other.

Here is a list of things that will not convert:

- **Point of Sale Shortcut Keys** – including *Categories*, *Items*, *Payment Types*, *Discounts*, and *Tip Rates*. The design of the keys in *Spectrum NG* will not allow a direct conversion.
- **On-Line Service Login Credentials** – due to the new security protocols and encryption methods, users will have to re-create their OLS usernames and passwords. After the conversion, there is a method in the software where you can have the system generate and email OLS credentials to each user. The user can then go online and change their username and password to whatever they would like.
- **Locker Setup** – we cannot convert the setup, but if you set up your lockers in *Spectrum NG* to use the same locker numbers as they did in the legacy product, we can convert the locker assignments.
- **All Equipment Checkout Data** – this module received a complete re-design for *Spectrum NG* and therefore the data cannot be converted.

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- **All of Event (formerly Facility) Management** - this module received a complete re-design for *Spectrum NG* and therefore the data cannot be converted.
 - **All of League Scheduler** - this module received a complete re-design for *Spectrum NG* and therefore the data cannot be converted.
 - **Report Writer Reports**
 - **Reports Created Outside of *Spectrum Management System*** – If you used Microsoft Access or Crystal Reports to create any custom reports from the database itself, these reports will all have to be re-created on the *Spectrum NG* database, as the table and field names have changed.
 - **Day Periods for Time of Day Attendance Report**
 - **Scheduler Colors**
 - **Contract Setup**
 - **Tejas (Food & Beverage) Setup**
 - **Scheduler Availabilities** – however, once you set up your *Site Operation Hours* in *Spectrum NG*, we can push those hours to all Resources and Providers.
 - **Accounts Payable/General Ledger Data** – this includes old A/R to G/L Postings
 - **Health & Fitness Data**
 - **On-Line Services Setup**
 - **Custom Statements** – we no longer offer the ability to have custom statements in the software.
 - **Software Customizations** – any customizations we made to the software for you will not be in the new system by default. Prior to converting you should discuss these with your Account Manager to see if they can be included in the *Spectrum NG*.
 - **Member Contracts** – The members will convert, as well as their information, but the electronically-signed contracts from *Spectrum Management System* will not be visible in *Spectrum NG*. Only the new contracts created in *Spectrum NG* will be visible.

Preparing Your Data for Conversion

Since you are coming from our legacy product, we already have the keys to decoding your database so there is no need for you to do any type of data export to send to us. However, converting to *Spectrum NG* can be an opportunity for you to do some clean-up on your data. Before the conversion itself, you should take some time to look through your data and see if there is anything you could do without. Specifically, look at your products, product categories, membership types, and member note subjects and make a list of the things that you would like to have removed. Now, if there is history associated with something (i.e., a product that has been sold in the past has sales history associated with it), we need to convert it or else you would lose that history. But, if something has never been used or it was used long enough ago that it is beyond the history you want to bring over, it could be possible to remove it. For things like the Note Subjects and Membership Types, you will need to specify which current subject/type you would like existing notes/members switched to when we remove the things you would like removed.

It is very important to note that once we pull the data for your live conversion, any changes you make to that data in the legacy system will not be included in *Spectrum NG*. You will need to wait and make the changes in the new system after the data is converted.

The Conversion Process

We typically do a two-phase data conversion process. Phase I is done well in advance of the go-live date and includes the background information that you can use to set up and configure your system. This also serves as a “test” to see if any issues arise with converting the members, transactions, check-ins, etc. You will use this data to train your staff, as the end-user data (but not the setups you have completed) will be wiped out and re-converted for Phase II.

The Phase I data conversion includes:

- Chart of Accounts
- Departments
- Members, Guests, Prospects, and Responsible Parties
- Membership Types
- Product Categories
- Products
- Payment Types
- Employees
- Locations & Workstations
- POS Locations
- Check-In Setups
- Inventory
- Series Sales
- Installments
- Deferrals
- Gift Cards

During your training and setup time, you should review all of this information and see if there is anything you would like to convert differently during Phase II. You will need to coordinate these changes with your assigned CSI Conversion Specialist before the Phase II conversion takes place.

During the Phase II conversion, the following items from Phase I will be wiped out and re-converted:

- Members, Guests, Prospects, Responsible Parties
- Inventory
- Series Sales
- Installments

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- Deferrals
 - Gift Cards

In addition to the re-converted Phase I data, the following items will also be converted in Phase II:

- Transaction History
- Balances
- Repetitives
- Check-In History
- Bank & Credit Card Information
- Pictures
- Facility Management Suite (Program Registration, Scheduler, & Spa Management) data

Conclusion

As a rule of thumb, it is a best practice to not assume anything that is not listed here will be converted. If there is something you do not see listed in this document that you are curious about, then please ask your CSI Conversion Specialist (assigned once your conversion is scheduled) to verify whether it will or will not be converted. By knowing what will and will not be converted ahead of time, you can prepare yourself and budget the time required for what needs to be set up again in the new system, and therefore have a much smoother implementation.