TraCS 10 to TraCS 18 Migration Quick Reference Guide

PUBLISHED BY
North Carolina Division of Motor Vehicles
Traffic Records Branch
September 2019
Pre-Installation Migration Pointers

Note the following, prior to migrating local machine from TraCS 10 to TraCS 18:

- Migrating user machines:
  - Migrate Supervisor and their assigned Reporter machines as closely as possible.
  - Once a report is opened in TraCS 18, the report cannot be opened in TraCS 10.
  - Once a user logs in using TraCS 18, they cannot go back and use TraCS 10.

- Complete all reports in TraCS 10 prior to upgrading:
  - Reporters should validate local reports and send them to server prior to un/installing TraCS 10.
  - Supervisors should accept local reports and send them to server prior to un/installing TraCS 10.

- All reports previously submitted to NC DMV in the past will be available in TraCS 18 from the Forms Manager. **There is no need to transfer reports from TraCS 10 to TraCS 18.**

Form Uploads and Searches

TraCS 18 automatically uploads the forms in Online mode. Additionally, users will be able to see all forms that are stored at DMV.

- All forms will be stored on the Server unless you are in Offline mode.
- In Online mode, form searches will now show all forms stored at DMV, to which a user has access rights. Setting up a default search is recommended and will be demonstrated in a later section.
- TraCS 18 does not require the use of TRCS in order to upload and download forms. Send/Receive button has been deprecated, as it is no longer required.
- All forms saved in the Forms Viewer will upload 30 seconds after the Forms Viewer has been closed, or when the Forms Manager has been closed, whichever comes first. Closing the Forms Manager requires user confirmation to upload forms.
- If TraCS is in Offline mode, the form will remain on the machine until TraCS is in Online mode.
- Incomplete (Open) reports that have yet to be Validated, Rejected, Accepted, or Transmitted will be uploaded to the server if they are saved and the forms viewer is closed. Users will be able to logon to a different machine and in Online mode can search for the incomplete reports and complete them.
- Supervisors will be able to see, search for, and open their and their reporter’s Open reports from the Server.

**Forms uploaded to TraCS 18 may not be downloaded to TraCS 10 and is not supported.**

- If a Send/Receive is performed on a TraCS 18 report from TraCS 10, any report showing up in the list will be locked and can no longer be opened in TraCS 18. Such reports will require an Agency Admin to unlock the report from TraCS 18 or use the Create Supplement button to continue working on Transmitted reports.
Setting up a Default Search:
As you may have noticed, in Online mode all forms that have been sent to DMV are available in the Forms Manager Search Pane. Specific search criteria can be set in the Form tab, saved as a favorite, and set as default. Once the Default Search is set, the favorite search will be populated in the Search’s Form tab on any machine that that user logs into.

For example, most Supervisors are interested in seeing their reporter’s validated reports.

1) Enter the desired search criteria, in this case, validated reports, by clicking the “Status...” button:

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Status search criteria selector box is show. Select Validated, and click OK button
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2) Status search criteria selector box is show. Select Validated, and click OK button
3) **Click the Save button under Favorite:**

![Search form with Save button highlighted]

4) **Provide the Search name, and indicate that it is the default search:**

![Search table with Default search highlighted]

5) **The User’s default search will now populate on any machine from which they log into TraCS via the TraCS Web Service.**

Additional Favorite Searches can be created and saved for future use.

**Creating a Crash Supplement Report**

Creating a Supplemental report is different due to the use of a Web Service to access a central, remote database:

- User still needs to click the Create Supplement button however, the form will not be immediately downloaded to the client.
- The report is updated so that the user that clicks the Create Supplemental can search for and access the report from the Forms Manager.
- The report must be opened in the Forms Viewer, and the edit button clicked for the form to return to Open status. A message will indicate that the Supplemental flag is required and will be checked.