



ClientTrack

New User Interface Upgrade Guide for ClientTrack



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About This Guide

After months of development and testing, Eccovia Solutions is pleased to announce that we are releasing a free upgrade to the best version of ClientTrack yet. This upgrade was informed by carefully listening to our customers' feedback, and motivated by our commitment to provide the best possible user experience.

The purpose of this guide is to help make this process as seamless as possible, so you can quickly start taking advantage of the upgrades we've built for you.

Upgrade Essentials

This upgrade has been designed to be low-impact on your ClientTrack functionality. The aim is to improve the user experience and user interface, so your functionality will remain precisely as it was.

The upgrade process is also very simple. Your Account Managers will work closely with you to schedule the upgrade as they would any other update, and the downtime should be minimal.

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What's New

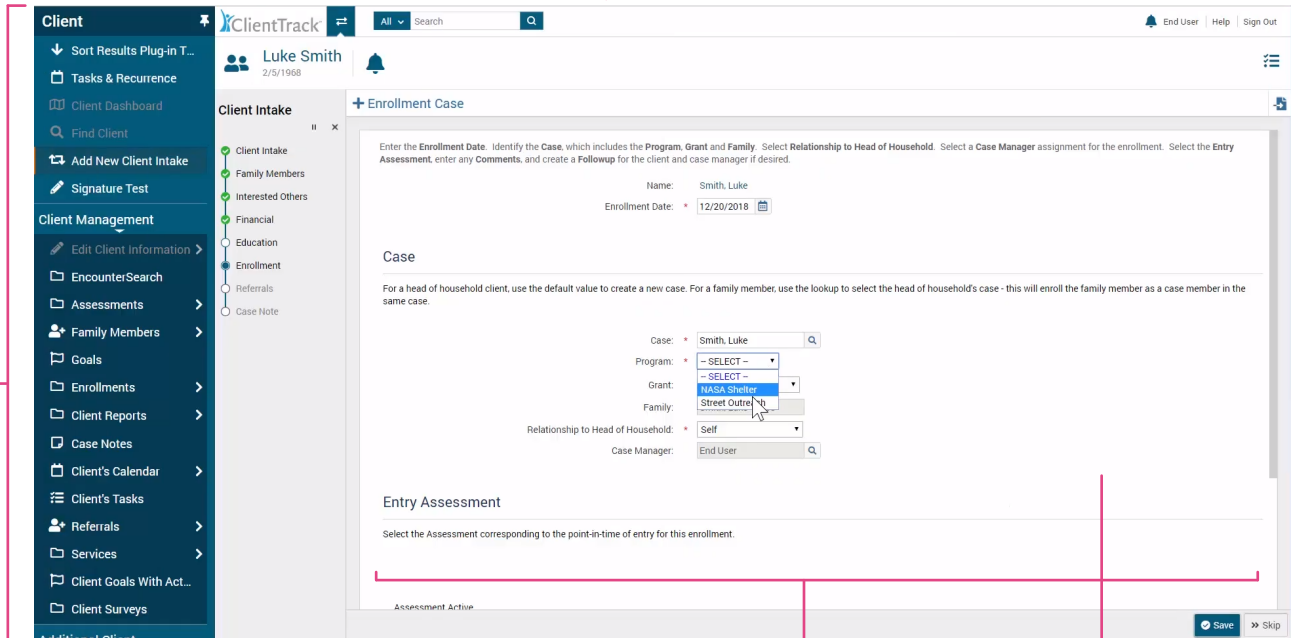
The ClientTrack interface is now cleaner, sleeker, and more intuitive, making it easier to find the information and functionality you're looking for.

Here's what has changed:

Increased accessibility software compliance so individuals of all abilities can utilize the system

Improved layouts make finding information more intuitive

Standard icons throughout system to simplify accessing functionality



Updated themes, including an improved "dark theme"

Increased space on data collection screens

Increased white space in workspaces and dashboards to facilitate finding important information

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Getting to Know Your New Interface

The new user interface is part of the path to a new ClientTrack experience. We want to continually improve our user experience to provide the best possible product, making it easy to find the information you need and help the people you serve. In this section, we will detail how to make the most of this new upgrade.

Step 1: Pre-Upgrade Planning

To help our customers best take advantage of the new interface, we will first upgrade your training environment to help your users acclimate and familiarize themselves with the changes. The first step is for your organization to plan this upgrade to your training environment, so contact your account manager to set a time and a date that works best for you.

Next, you will need to determine a go-live date. The primary factor here will most likely be how long you want to keep the upgrade in training for testing and acclimation. Once you have made this determination, let your account manager know so we can schedule the upgrade to your production environment.

NOTE: You do not need to plan a sync. Because this is a low-impact upgrade that does not require making changes to any of the features, a sync is not necessary. Note also that once your training environment has undergone the upgrade, it will not be able to sync with the production environment, as it is not possible to sync between versions.

Step 2: During Upgrade to Training

After the upgrade has been applied to the training environment, we will provide release notes and instructions to help your team work with the important changes we're making, including our standardized icons, the color adjustments and themes, the improved spacing, and workgroup navigation.

This analysis, plus adequate testing, will help ensure a smooth enterprise software upgrade as you make the transition from training to your production environment.

Should you encounter technical difficulties, submit support tickets as usual; support will address these tickets as they normally would.

When the planned go-live date arrives, confirm to your account manager that you are ready for the upgrade to go live to the production environment.

Step 3: Move to Production

Plan the move with your account manager. The move should be quick and painless, with minimal downtime.

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After Go-Live

From here out, expect business as usual. As you come across any unforeseen technical difficulties, as before, simply submit tickets as usual. For anything that requires emergency attention, contact support directly for immediate resolution.

We're excited to share this upgrade with you and we're confident that the changes we've made will better enable you to provide the critical case management help that your clients need.