What's New in VSys One 3.0 Webinar
January 2015

General
- New main screen User Interface. *Tip: Use your search boxes.*
- Added a new <u>Get support</u> link on most screens in VSys.
- Added support for bookmarks.
- Find a report link - moved from the top of the reports panel .
- Added support for *"named teams"* - teams where all the people on the team exist in VSys as individuals.

Notifications
- Added support for notifications based on eligibility checklists, mandates and trace (audit log) records.

People
- The **Person lookup** tool now supports right-clicking on a person to edit or view in a new window .
- In addresses, an e-mail address which appears to be invalid (but not marked as "known bad") now shows in orange .
- Within the profile editor, added a new link <u>View job openings.</u>
- Within a person's profile, right-clicking on an assignment now allows opening and viewing the definition of the associated job.
- When creating a recurring assignment or editing the rules for an existing one, adds the link *Compare these assignments to job slots* which can be used to see how the recurring assignment details match to job slots and the status of those job slots.
- Job assignments get a new property, *Cancellation reason*.
- New job assignment statuses, *Pending release form* and *Cancelled: no release form*, *Cancelled: no replacement necessary.*
- When creating or editing a recurring assignment, setting the duration to > 12 hours/day now shows that duration editor in red.

Tools that had been at the bottom of People
- Hours, assignments and scheduling - own panel.
- Accounts -> User Tools.

Assignments
- The **Job slots and assignments into them** tool now supports many more right-click tools for slots, including extend, delete all and delete for date range; added the Day column; can now filter based on Job tags and Supervisor.

Application Forms
- Added the concept of application *Approval statuses* with an application approval workflow process.
- Applications of type *Normal* are now *Desktop*.

Screening
- Added support for Verified Volunteers background checks.
- Revised the UI for background check send/receive.
- Interviews now have the additional property *Followup date* and support custom fields.

Reports
- Removed the **Assignments calendar report** (the non-RTF variant); the RTF version can load the settings from the older version reports.
- Added new report and mail merge field for people, *Mailing dear (informal first).* It works just like Mailing dear but prioritizes using a first/given name before "Mr. XYZ".
- Re-arranged the layout of **Custom column** reports, putting the tool for selecting fields into the same type of drop-down used by the **Advanced exporter**.

User Tools
Advanced Exporter
- In the **Advanced exporter**, right-clicking on a field to be exported brings up an option to edit/rename the field as it's exported.

Interactive File Importer
- More options for importing especially in recurring assignments and job slots.

Lists
- Standard lists (not Intellilists or temporary lists) now know when individual records were added to them.

Trainings
- Added new reportable properties for training records, *Hours credited* and *Hours credited duration*.
- On lists of training records, drag & drop of files is now supported.
- In the list of entrants for a training course, now adds an additional person lookup mechanism.
- Added support for setting the *Duration* for training records which are not associated with courses.

Accounts/Outcomes
- Moved into this section.

Bulk value updater
- Added dozens of new attributes of job definitions that can be updated.
- Fields which are multi-line texts can now be edited in that format.
- Now natively handles updating RTF fields and more intelligently displays RTF values.
- Recurring assignments and more job slots details can now be modified.

Letter templates
- Added new report and mail merge field for people, *Mailing dear (informal first).* It works just like Mailing dear but prioritizes using a first/given name before "Mr. XYZ".
- Added new letter template sub-letter type *Combined calendar* which includes assignments, trainings, interviews, expiring trainings and expiring certifications.

Administrator tools
Security
- Added new security right, *Add comments to people even without edit rights.* A user with this right can add comments to people to whom the user has "View" rights even if the user does not have "Edit" rights.
- The special right to change a person's status now applies to *Inactive* and its associated dates, *Banned* and its properties, along with *Deceased* and *Date deceased*.
- Added new security right under **Special people rights:** *Edit/delete attachments.*
- Top-level locations setup is now controlled as a security right.

Kiosk
- **Kiosk settings** tool re-arranged into a more logical fashion.
- Kiosk settings can now be exported to a file and imported into another VSys database later.

Setup
- Redesigned the **System preferences and feature enabling** tool.
- Added new advanced system options: *After creating or editing a recurring assignment, immediately attempt to match those assignments against open job slots, If application 'Approval statuses' defined, prevent editing the 'Status' property of applications, When launching help, copy the help file to a local drive before loading, Within projects, include the "Checked in" property for people, Within certifications, hide the 'Scanned images' link if no scanned images associated with that certification, and For attached PDF files, view those PDF files only using external PDF viewer*.
- Added new system preferences options *In various job tools, indicate 'Every other (a)' and 'Every other (b)' for dates* and *In various job tools, indicate weeks 1-5 for dates*; when checked, these cause the week of the month and a/b and/or week number to appear next to dates in the **Jobs/slots calendar** tool, **Job slots and assignments into them** tool and **Finding job opportunities** tool.

Custom fields
- Redesigned the **custom fields setup** tool.
- Jobs, locations and interviews now support custom fields.

Eligibility/Intake Checklists
- Added support for notifications based on eligibility checklists.
- Eligibility checklists are now subject to transitions tracking.
- Added new **View and edit eligibility checklists for many volunteers at once** tool.

Jobs
- In many places you can now right-click on a job, job assignment or job slot and select *Reports* to print reports which are based on job definitions as well as view comments and attached files for that job.

Internal/technical
- Added a new mechanism to attach documents to tools within VSys; this is intended for organizations that want to include operational instructions or files associated with specific screens in VSys.