What's New in VSys 4.0
Fall 2019

Profile Editor
- In the Profile Editor, listings of **certifications and background checks** now show the number of attached documents; mouseover hints for interview show any comments associated with those interviews
- In the **Profile Editor**, changing someone's status to *Inactive, Terminated, Rejected, LOA, Retired, Resigned* and *Never started* will prompt to cancel future assignments, trainings and job associations
- In the Profile Editor, when summarizing a person's hours, now includes **fiscal summaries** if appropriate
  Added the new interview status *Exempt*
- In the **names setup** tool, added the property *For people, edit the alternate name directly below the name fields* which, when checked, relocates the alternate name fields to the same panel as the other names
- In the **Profile Editor**, Intellilists that the person may be on do not appear in the checklist of lists

Assignments/Associations
- In **lists of assignments**, esp. recurring assignment details, holding the mouse over an assignment will now show the assignment's comment as a mouseover hint
- Added the new **job association status** *Applicant*; this status is considered to be *inactive* for the purposes for job signup and other tasks that require an active job association
- Added the new **job association statuses**, *Prospect, Not placed, Pending volunteer acceptance* and *Rejected*
- The **Job slots and assignments into them** tool now removes the "People" column
- The **Job slots and assignments into them** tool now hides the "Job signup window rule" and/or "Job tags" columns if empty; cancelled assignments now show in red; now supports right-clicking on a slot and changing the associated job but only if there are no assignments linked to the job slot
- **Object renaming** can now be used to change the names of job association statuses
- The **Job slots and assignments into them** tool, when told to send a letter to the people in a job slot, now works with letters based on assignments as well as those based on people.
- The **Jobs/slots calendar** tool now supports right-clicking on a job slot and sending assignment-based letters to the volunteers in that slot

Jobs
- Added the concept of **Job activities,** intended as activities done while performing a job, and which enable the capture of metrics and other properties as virtual hours records associated with the primary (real) hours record; these are distinct from "Activity types" which are just another form of job tag

- When **job activities** are enabled, hours records get the properties *Virtual* and *Virtual duration*; note that virtual hours are not visible within a volunteer profile; hours can be filtered by virtual or not
- Job definitions now support having a job get its **accounts/outcomes properties from its job group**
- **Job groups** now support limiting the custom fields which will be shown for job slots associated with jobs in those job groups
- A job group can now specify that ***no* custom fields** are applicable to slots in that job group
- *Communities served* is now a property of job slots
- Job checklists and combo boxes now support right-click->*Hide inactive jobs;* combo boxes default to hiding inactive jobs
- In the jobs setup tool, added the checkbox *Hide inactive jobs*
- Added a **setup feature**, *Slot job description overrides.* When enabled, job slots can be individually given descriptions that, in most places, will display either in place of or in conjunction with the name of the underlying job
- Added **reportable field**s for jobs, *No mileage tracking, Default miles, VSys Live: Self-entry of hours, VSys Live: No self-checkin, Supports clients* and *Kiosk self-entry of hours*
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Job connection rules
- Added the concept of **Job connection rules.** These specify, for example, that a person must have two or more of *Active job association*, *At least one future assignment for job X* and *At least twenty hours in three records*. The connection rule itself does *not* specify the jobs! When the connection rule is used in, for example, an online training course's specification, the course properties include the rule and then one or more jobs. That allows the rule - which is used to specify how a person is connected to a job - to also be unconstrained by the job selection, enabling the same rule to then be used in multiple training courses, each requiring a different set of jobs but all with the same rule that says how the user must be connected to the jobs. These are enabled in various filters (available everywhere), VSys Live online trainings, regular (in-person) training courses as selected using VSys Live (the rules do not apply when an administrator manually adds someone to a course), and in VSys Live visibility rules.

Hours
- **Volunteer-provided comments** during hours entry in VSys Live and VSys Web are now reportable & visible separately from the accumulated overall *Comments* property of an hours record; both *Comments* and *Volunteer comments* are now available in listings of hours in VSys Live

Lists
- Vastly improved the performance of loading a large list in the List manager/Intellilist setup tool

- Lists now have the property *Hidden in filters, too* if *Inactive* is checked
- An inactive list now does not appear in checklists of lists in most places *unless* the checklist already has that list selected, in which case it will appear; the criteria for how an "Inactive" list appears is loosened in places where that checklist is used as a filter, and an inactive list that is not marked as *Hidden in filters* may appear in locations like that even if the list isn't currently selected
- In lists setup, now supports archive/de-archive of multiple lists at once
- In **List Manager,** holding the mouse over an Intellilist now shows the most recent times it's been recalculated along with the time each recalculation took

Reporting/Filtering
- Rebuilt the **XLSX export tool** for huge performance improvements when exporting large files
- When reporting on job definitions or using the Bulk Value Updater for job definitions, can now filter on custom field values associated with the job definition
- Replaced the **Excel 2007 export** engine with one far faster and more memory efficient
- Calculated fields can now be used in the Advanced Exporter
- The filter *Automatically checked out* assignments is renamed to *Automatically checked out hours records* to reflect the fact that the filter applies to any checkin whether based on assignments, open schedule jobs, job associations, etc.
- Added a new built-in summary report, "Login summary"
- Filters on **certifications** (when used to filter people, not certifications) now support the property *Only if not expired*
- When filtering people by certifications, now supports requiring that the person have a specific count of those matching certifications; note that requiring a specific count removes the option of doing detailed field-level filtering on the certifications
- Added a new filter, **Security roles**
- **Hours summary reports** now better fit their contents in cases with very wide job names by always adding summary columns from the right
- **Custom field string and memo values** can now be filtered by *Equals* and ***Does not equal*** with optional case-sensitivity
- Reports which include the field **Fiscal month** now display their values with the month name, e.g. "Month 02
- Using the Advanced Exporter, RTF custom fields can now be exported
- In reports based on job associations, hours summary fields for the job in that job association are now available
- In reports based on slots, the field *Assigned volunteers* is now available; it's a delimited list of all volunteers who are assigned to this slot with active-like statuses
- In various report designers, assigning a field the format string of "!" (a single exclamation point) tells VSys to strip any HTML content from the value of the field when rendering it
- The general filter **Assignments** now supports requiring or preventing the referenced assignments from being recurring assignment details

Letters

- Added a new property to letter template sub-letters, *Skip entire letter if this sub-letter is empty*
- **Letter templates with sub-letters** now, in some cases, support assigning default filter values to the sub-letter's contents for use in "Quick" mail merges
- Various properties of letters are now tracked via transitions
- In various jobs/slots calendaring tools, when choosing to send a letter to volunteers in a job slot, now excludes from the list of recipients anyone whose assignment status is any of *Excused, Not Excused, Cancelled by volunteer, Cancelled by staff, Waitlisted, Rejected,* or *Volunteer requests replacement*
- When **inserting fields into a letter template**, reorganized the structure of the fields tree to be more intuitive and useful
- When the E-mail Robot delivers an e-mail with an attachment without **a seemingly-valid file extension**, it now attempts to add that extension to the file

Reference Checks

- Rebuilt **the reference check system**: can now specify *E-mail* or *Letter (printed)* as a delivery method; as *Letter* it does not enforce the requirement for a valid e-mail address. Generating letters can now be done for only those not yet contacted or those contacted within a date range and can filter on method (e-mail or letter). Note that this required changes to the definition of the Background Reference Check certification; if certifications do not have the appropriate field, go into certification setup and revert this certification to its built-in layout.
- **Reference check letters generated via a scheduled task** now support running reference check letters
- Added the fields *Title* and *Phone 2* to the built-in background reference check certification

Notifications

- Notification subscriptions can now be reassigned to other "virtual" subscribers or to a specific person
- Notifications delivered by e-mail now properly make the "X-NotificationID" line very small and in white text
- Notification subscriptions now support opting specific recipients out
- Notification triggers now support numerous additional properties of people including custom fields
- Notification triggers based on *Slot needs people* can now be filtered based on the *High priority* status of the job slots
- The notification subscription trigger *Slots needing volunteers* is renamed to *Slot statuses/slots needing volunteers*
- Notification subscriptions now support the expansion helper *All supervisors of the referenced person*
- Notifications based on attachments now support filtering on attachment status

- Notifications based on expiring trainings now support not notifying if the training has been replaced by a newer one (with the same subject and a later expiration date) than the current one
- Notifications based on certifications, when exactly one certification type is selected, can now use "deep" filters based on the properties of the certification, and can now include detailed properties of the certification via the template
- Many notification triggers now support the property, *Also send to all defined supervisors for the underlying job* which sends the generated notification to each person explicitly defined as a supervisor in the job referenced by the trigger object (assignment, job association, hours record, job slot) or its job group

VSys Kiosk (desktop)
- In the **VSys Kiosk** (desktop), if a single language is supported, when the kiosk starts it will start in that language
- In the **VSys Kiosk (**desktop version), notifications older than the kiosk settings' "Hide old messages" date are now hidden
- VSys One now always assumes that the desktop kiosk is running version 3 or higher

System/Setup
- Added the new advanced system preference *When reporting on a person's primary supervisor, allow reporting deep detail fields for that supervisor*
- Added the advanced system preference *Enable "slot series" where signup is for the first slot but volunteer gets assignments for all slots in series*
- VSys One desktop *Home screen panels* can now be edited as raw HTML
- Various listings in VSys One now support **right-click --> "Expand all" and "Collapse all"**
- Revised the UI in the Assisted Checkin tool
- System preferences now enable renaming or hiding of the "User text 1", "User text 2" and "User text 3" fields as applied to job definitions
- Added the new property for people, *Inactive comment*; this is available only when the person is given a status considered to be inactive
- Added the new **scheduled task**, Extend recurring slots
- Job slots can now be renamed using the **Object Renaming** tool
- The **Object Renaming** tool now supports renaming options such as "Skills", "Job preferences", "Restrictions", etc.
- Added a new **advanced system preference,** Associate addresses with job slots
- Various setup tools now allow a **second user to open the tool in read-only mode**
- Added the advanced preference *When setting up jobs, show the "Locations" column*; if not checked, the jobs setup tool now suppresses the *Locations* column by default
- Added **President's Day** to the defined holidays list
- Revised **how custom fields** are displayed and edited in VSys One
- **[F1] help** is now launched by default in a browser instead of locally

Security

- In VSys Security, added a new property to security users, *Password never expires*. When checked, that user is exempt from password change frequency requirements
- In **Security Manager**, now supports right-clicking on a user to *send a letter*
- In VSys Security, when giving a role or a user rights to people based on the job associations of the target person, added the new options:
    - **Only if user supervises this job association** = requires that the current user be the "Supervisor" value of a matching job association for the target person
    - **Only if user has a job association for the same job with the status of 'Supervisor'** = finds all jobs for non-expired job associations for the current user with the status of "Supervisor" and gives that user rights to people who hold a job association for one of more of those jobs
- in Security Manager, when a user account is opened, now indicates if that user's profile is other than active, is deceased, banned and/or archived
- if Security Manager is opened by one user, **a second and later user can now open it in read-only mode**

VSys Web Advanced

http://www.vsysone.com/docs/VSys/HTMLDocs/4.0/#4945.htm