

What's New in 2.1 Webinar Spring 2013

Person lookup

Use the "Search people" tool to type in their last name, DOB, e-mail address, phone number or kiosk PIN and have VSys do the search right then and there.

You can now show custom fields as columns in the search results.

Person profile

Certifications

Based on rules you define, VSys One can now automatically create certifications (page 448) for someone when you create a new person. And it can link trainings and certifications, too, creating or updating certifications based on completed trainings.

Restrictions (page 489)

Restrictions are attributes that you define and that you can associate with people. These attributes can then be used to determine eligibility for jobs. (You've always had "skills" to say what volunteers can do, now you have a tool to say what they can't do.)

Panels

You can now have the panels in the Profile Editor sorted alphabetically.

Schedules

For a single volunteer - Right-click on the person and select *Send this person their schedule*. VSys will generate an assignment calendar report in PDF format then open up your e-mail program with this person's e-mail address and that file.

For many volunteers - Send calendars to many volunteers at once by including it in a *letter template* (Assignment calendar). When VSys merges the letter for each person it will include the calendar itself within the e-mail as formatted HTML.

Reminders (page 146)

VSys has for a while been able to send e-mails or SMS/text message reminders (page 146) to your volunteers about upcoming assignments, interviews and trainings. Now? It can automatically send them reminders about certifications (like their TB test) or trainings expiring, too.

Notification subscriptions

You can now configure VSys One to notify you about all manner of interesting things:

- Security account lockouts
- Assignments, hours and trainings pending approval

- Certifications expiring
- Incoming messages
- New assignments, interviews and trainings
- Recurring assignments ending
- Self-cancelled assignments, interviews and trainings
- Slots still needing volunteers
- Volunteer check-in
- Volunteer missing
- VSys Web applications and hours pending approval or needing download

These notifications can be sent by e-mail, SMS/text message, or show as messages within VSys One itself, and can go to explicit subscribers (people who you've indicated should be told about such things) or to automatic subscribers (assignment supervisor, training instructor, interview interviewer).

Scheduled tasks (page 525)

There have always been ways to, for example, have VSys run a report automatically, but it was clunky and VSys couldn't deliver the results for you. You could run the index rebuild tool or backups from the command line, but you really had to know what you were doing. In 2.1, VSys now comes with its own task scheduling tool that lets you define a wide variety of tasks that can be run manually or automatically on a schedule.

- Background check synchronization
- Backup
- Bulk Value Updater
- E-mail delivery
- Export data (and deliver it to any number of recipients automatically)
- Generate reminders
- Automatically approve pending hours
- Import a file
- Rebuild indices
- Mail merge
- Notification subscriptions generate/deliver
- Run a report (and deliver it to any number of recipients automatically)
- Synchronize with VSys Web

Reporting

Custom column reports (page 253) now summarize and/or total.

Need to run the same report on a regular basis? From within a report just click on *Save as a shortcut*. VSys will make a **desktop shortcut** with the report exactly as it is on your screen. VSys packages the exact settings you have onscreen right now into one desktop shortcut that you can run anytime you need it without even starting VSys itself.

Bulk tools

Sometimes when you need to do something, you need to do a lot of it. The **Bulk Awards Creator** (page 160) and **Bulk Certifications Creator** (page 451) can make awards and certifications for any number of your volunteers at once based on your rules.

And the regular **Bulk Value Updater** (page 390) now has a test mode.

Little stuff

- **Training courses** (page 493) can now have one or more prerequisites (required previous trainings), so you don't have newbies in your advanced courses.
- **Assignment and hours filters** can now filter on day of week, so you can get yourself a listing of everyone who worked Mondays in 2011, or missed Friday assignments last month.
- There are some new **filters for "missing" things** - no group, no password, missing assignment?