

VSys Tips and Tricks

Webinar - Fall 2012

Tools to help:

- That little filter icon, what does it do?
- Context-sensitive help is enabled. Press the **F1** key at any screen to bring up help for using that screen/tool. Or look for the green question mark.
- Links to documentation and previous webinars.
- Most combo boxes support incremental lookup by typing into that editor.
- Hover over a breadcrumb along the top of a page and see what that screen looked like when it was last used.

Working with people:

- In the **Person Lookup** tool, if 1 or more people are excluded due to their status, the message informing you about this will include a hyperlink that allows you to repeat the search without those status filters. (and the "Exclude" list is unchanged)
- Right-click in person lookup or advanced lookup: show/hide columns and send kiosk message.
- In the person lookup tool, you can drag & drop files directly onto a person to add them as attachments to that person.
- Added the ability to send letters, run reports and add/remove from lists directly from within a person's profile.
- View "Years of service" in person editor.
- When editing an address, entering the zip/postal code when the city or state fields are empty will now automatically populate those fields if possible.
- Phone/e-mail searches and the bad phone number entry tool find partial phone and e-mail addresses.

Working with letters:

- Letter template editor gains support for previewing how the template will look as a merge.
- How to add an attachment to a letter.

Working with jobs:

- You can right-click/**Create a job assignment->Recurring assignment** to the Jobs/Slots Calendar Tool.
- There is a "Job group parent" level in "jobs and job groups definition"

Reporting and filtering:

- There is a new filter, Certification expired or missing.
- Relative dates support adding/subtracting weeks, months and years. You can also take the date and adjust it to the first or last of the week, month, quarter, year or fiscal year represented by that date.

Tools for administrators:

- When security is enabled, if the security user (as a person) has a photo, that photo will be shown in the upper-left corner of the screen. If not, and the user is a superuser, then the "secret agent" icon is shown.
- Message when users log in
- Timeout if inactive for X seconds
- Remote session termination tool

Customizing how it looks:

- User Preferences
- Personalized title bar text (the top bar which usually says just "VSys One").
- Add your own logo in the lower-left corner of the main VSys screen.

Customizing the kiosk:

- Can now hide the Admin tools button on the kiosk by using a PIN.
- Customized greeting at top of kiosk.