

Vmoso Release Notes, September 21, 2016

A new release of Vmoso is planned for Wednesday, September 21, 2016. The following new features and updates are planned for this release:

Assign and manage tasks in Basic Mode. You can now create and manage task activities in Vmoso while working on Basic Mode. Previously, tasks were only available when using Vmoso in Advanced Mode. To use tasks in Basic Mode, your Vmoso account manager must enable tasks for your account.

Linking improvements. You can now add a link to a specific comment in a different Vmoso activity when working in the Vmoso text editor.

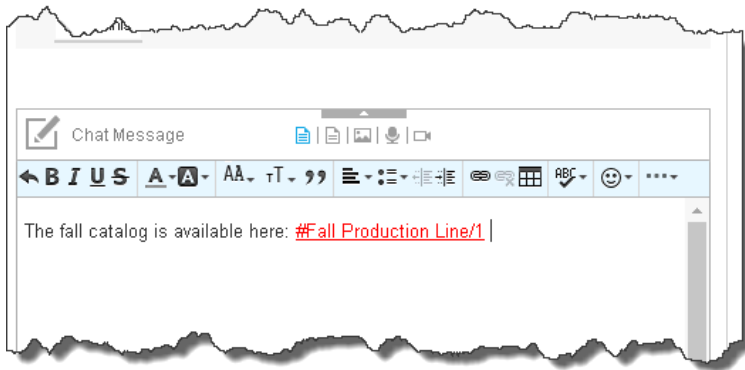
Type the # character followed by the name of activity to which you are referring. A popup menu appears after you type a few characters where you can select the activity name.



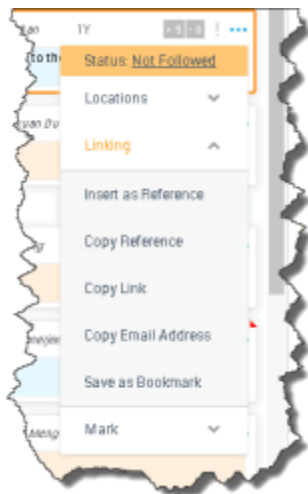
A link to the activity appears in the text editor.



Finally, type the / character after the link and then type the number of the specific comment to which you are referring. A link to the comment appears in the text editor to the specific comment.



Changes to commands on the ... (More) menu. Several changes were made to the commands that appear on the **More** (...) menu that are available in the activity stream and on the activity detail page.



In particular:

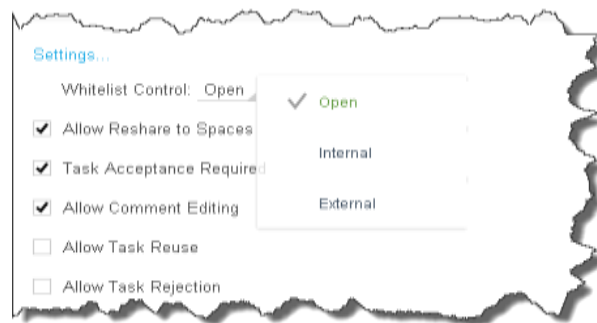
- A new command is added to the **Linking** section named **Copy Reference**. Use **Copy Reference** to place a link to the current activity or activity comment on the Clipboard. You can then paste this link in the Vmoso text editor.
- The **Linking** > **Copy Destination** command is renamed as **Copy Email Address**.
- The **Clearing** section is renamed as **Mark**. With this name change, it made sense to move some commands from the **Locations** section to the **Mark** section. You will now find the **Important**, **Favorite**, **Hidden**, and **Follow** commands under **Mark** instead of under **Locations**.

Support for enterprise and affiliate members. If you are using a premium version of Vmoso, you can now provision members according to how they work with your company. Options are:

- **Enterprise** members are people internal to your company.
- **Affiliate** members are people external to your company.

Once you set up your Vmoso account with provisioned users, you can provide specific content to the different audiences:

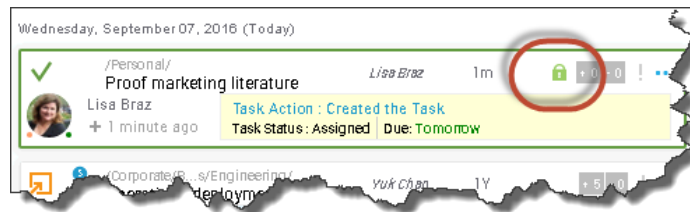
- *You can limit access to spaces based on the type of member.* When creating spaces in Vmoso, you can set restrictions on spaces so that they are limited to just enterprise members or enterprise and affiliate members. Color-coded padlocks indicate who can access a space:
 - A green padlock indicates spaces that are limited to enterprise members.
 - A red padlock indicates that the spaces are available to affiliate members.
- *You can limit access to a task or chat based on the type of member.* To set assignee restrictions for tasks or chats, go to the **Settings** area on the task/chat creation page:



Set the **Whitelist Control** setting to one of the following values:

- **Open.** The default setting. Anyone that you are connected with in Vmoso can be added as an assignee.
- **Internal.** Only people who are enterprise members can be assigned the task or chat.
- **External.** Enterprise members and affiliate members can be assigned the task or chat.

Any tasks or chat that you mark as Internal will have a green lock:



And tasks or chats that you mark as External will have a red lock icon next to their name:



- You can create contact groups based on the type of member. When creating groups of contacts, you can create contact groups to support these new types of members:
 - **Corporate.** These contact groups are limited to your enterprise members.
 - **Affiliates.** These contact groups are limited to your affiliate members.
 - **Hybrid.** These contact groups can contain both enterprise and affiliate members.

Corporate, Affiliate, and Hybrid contact groups are managed by bulk upload in the Vmoso Management Center.

To support enterprise and affiliate members, we made some changes to the Vmoso default spaces:

- The **Corporate** space is now called **Intranet**. Intranet spaces are provided by your corporation for work-related sharing with people who are internal to your corporation. You are given access to various spaces based on your role within the company. The top-level intranet spaces are created by your account manager in the Vmoso Management Center.
- **Extranet** spaces are provided by your corporation for collaboration with the affiliate members in your account. The

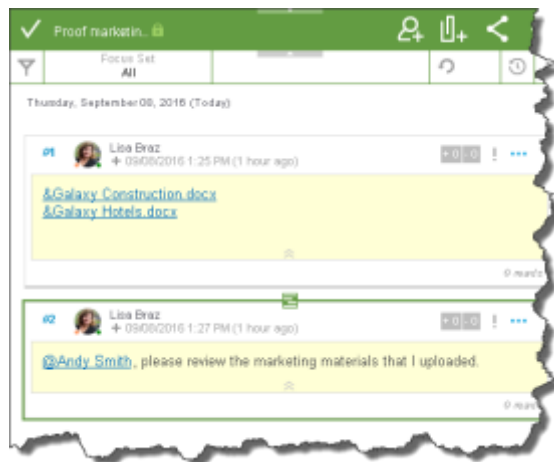
top-level extranet spaces are created by your account manager in the Vmoso Management Center.

- **External** spaces are provided by partners with whom you work, where you are an affiliate member of their extranet spaces. This space will be empty if you are not an affiliate member of another Vmoso account.
- The **Integration** space contains links for any integrated products, such as Clearvale. This was previously called **External**.

Knowledge maps. You can now generate knowledge maps for activities that appear in your activity stream. Knowledge maps visually show the links within an activity. Links include:

- @ references to a particular person
- # references to a comment
- & references to a document

The links can appear in the activity itself or the comments for the activity. For example, if you have a task these three links:



The knowledge map for this task would look like this:



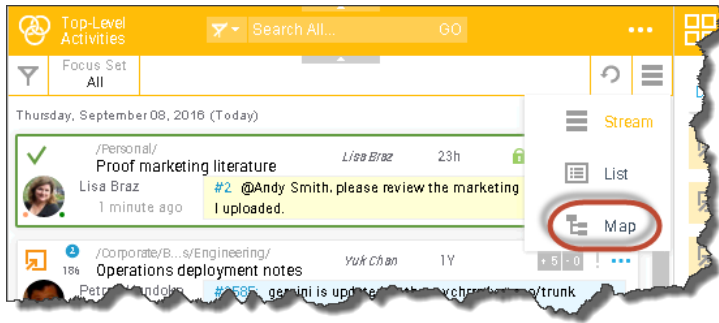
Note the following about the knowledge map:

- The green circle in the middle represents the task.
- The two linked documents appear as the yellow circles with the document names in the middle.
- The linked user appears in a blue circle with his name in the circle.

You can navigate around the map by clicking on the various items. For example, if you click one of the linked documents, the knowledge map redisplay and shows the other activities which also contain links to the document:



To access the knowledge map for an activity tile, click on the tile in the activity stream and then select  >Map.



If you are using a mobile app, swipe left and select **More>Actions>Map**.

This feature is available in Advanced Mode only.

User Interface improvements. A few user interface improvements were made:

- When saving a chat or a task as a template, the confirmation message now indicates the location of the template.
- In Basic Mode, on the detail page for an activity, the local search field is now available by clicking the Search icon:



- Also in Basic Mode, as shown in the above image, the close icon for a detail page is reduced in size.

Vmso Management Center enhancements. To support Vmso enterprises, several enhancements were made to the Vmso Management Center:

- **New roles.** The Vmso Management includes the following additional roles:
 - **Account Admin.** Someone to assist the Account Manager with managing a Vmso account. People with this role can do everything that an Account Admin can with the

exception of being able to edit the account settings or add or remove account roles. Account Admins are optional.

- **Enterprise Admin.** Someone to manage the top-level Intranet space. The top-level Intranet space is now referred to as an enterprise. Each account should have at least one enterprise, and each enterprise requires at least one Enterprise Admin. You will not see the option for assigning this role until you create an enterprise space for your account.
- **Enterprise Super Admin.** A super user who can see all Intranet and Extranet spaces created for an account. You will not see the option for assigning this role until you create an enterprise space for your account.
- **Support for Super Admin Mode.** People with the Enterprise Super Admin role can login into Vmoso and manage all of the content in their enterprise. For example, they can delete inappropriate comments on a blog post. The Vmoso Management Center provides a log of all changes made by the Enterprise Super Admin.
- **Support for Vmoso Enterprise and Affiliate Users.** The data upload files for provisioning users, spaces, and contact groups for your account have new syntax to support the following:
 - Provisioning new members as either Enterprise or Affiliate members.
 - Creating spaces for your account that are either Intranet (limited to enterprise members) or Extranet spaces (open to enterprise and affiliate members).
 - Creating contact groups that are limited to enterprise members (Corporate), limited to affiliate members (Affiliate), or a combination of enterprise and affiliate members (Hybrid).
- **Support for account-level password policy.** You can now set up a password policy for your account members. For example, you might want the password to be a certain length or to expire every 90 days.

Password Policy

Use System Default Custom

Minimum password length

Maximum password length

Minimum number of special characters

Password expires in days

Number of months password reuse not allowed

Effective date for password policy to apply [YYYY-MM-DD]

- **Support for tasks in basic mode.** When creating an account, you can enable tasks so that people working in Vmoso in Basic Mode can create and manage tasks.

Account Settings

Status:

Landing Page:

Enterprise Provisioning Mode:

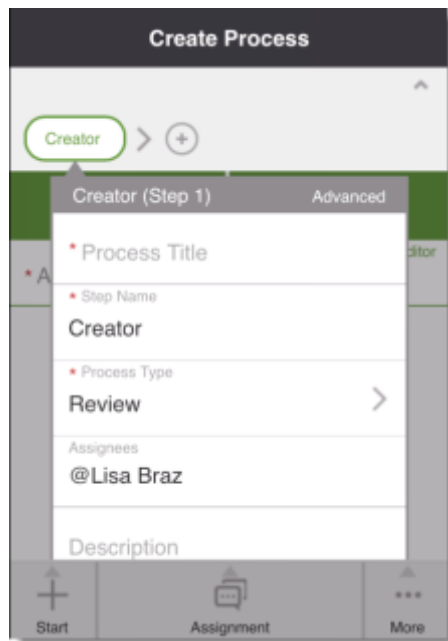
Restrict Importing Contacts:

Allow Tasks in Basic Mode:

Display Full Timestamp:

Support for Processes on mobile devices. If you access Vmoso through a web browser on a mobile device, you can now create and manage processes in Vmoso. Processes are similar to tasks in that they can be assigned to people. However, they differ in that they are multi-step, and each step can be assigned to different people.

Click **Start>Process** to start an already-defined process or to create a new process. When defining a process, it must start with the Creator step, which is pre-named for you. You can then click the + button to add more steps to the process.



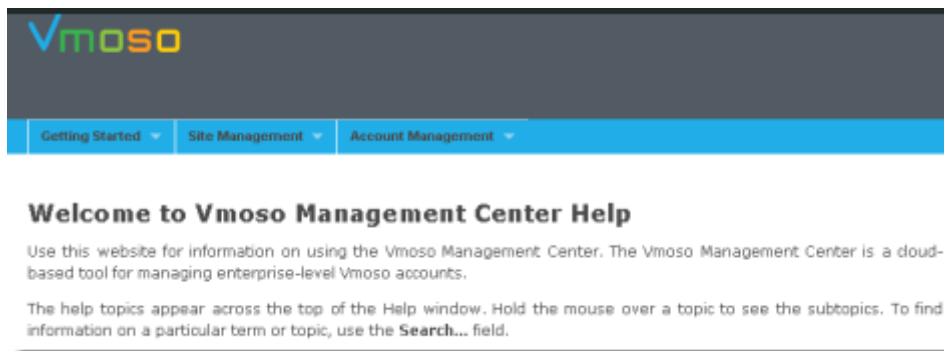
Processes appear in the activity stream like other activity types such as posts and chats.

Note that this feature is limited to people accessing Vmoso directly within a browser on a mobile device. If you use the Vmoso app or access Vmoso from a desktop browser, you will not see this feature.

Online help. The Vmoso Management Center now has its own online help system.



The help looks as follows:



The help is organized based as follows:

- Use the **Getting Started** menu for information on roles and accessing the Vmoso Management Center pages.
- Use the **Site Management** menu for information on managing a Vmoso installation.
- Use the **Account Management** menu for information on managing a Vmoso account or enterprise.

API Changes. Several API changes are introduced in this release to support the new features.