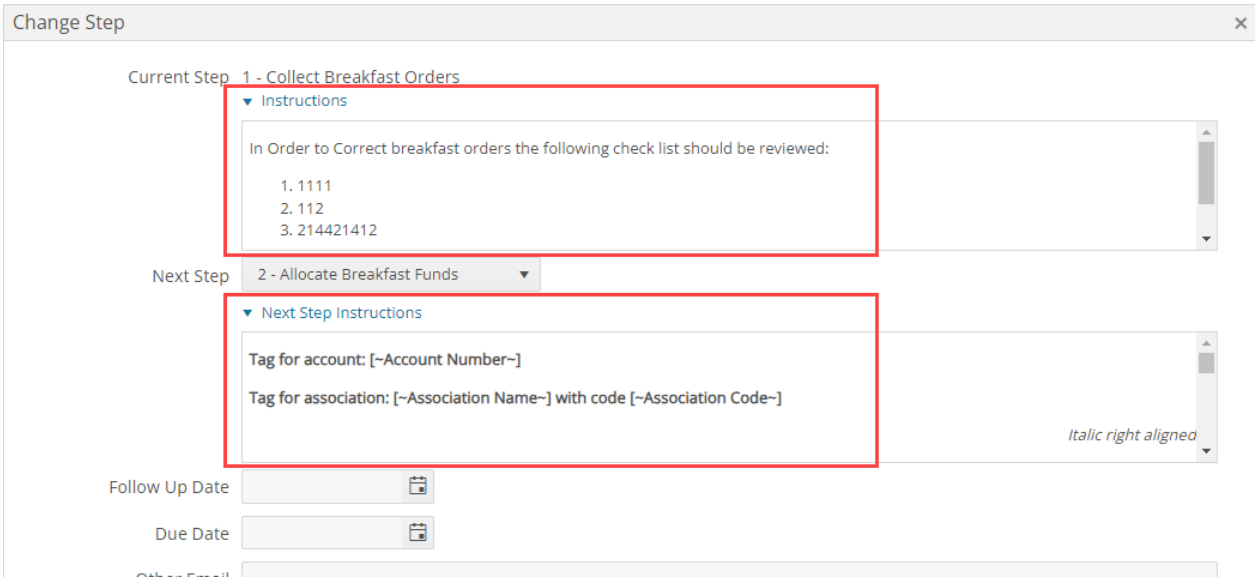
September 28, 2023 Release

Vantaca Features

Step Instructions

Added the ability to view **Step Instructions** when stepping an Action Item.

- If an Action Item has Instructions configured, a **Step Instructions** drill down can be opened to view instruction details on the Change Step form.



CCR Delete Protection

Added **Delete Protection** to CCR Items.

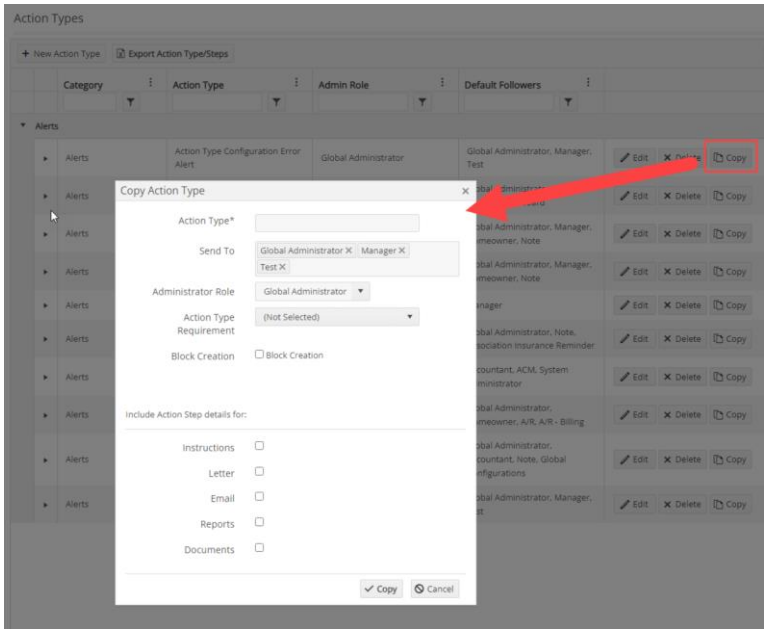
- Attempting to Delete a CCR item that is being used by other associations will result in the following message:
  - "[*CCR Description*]" is currently being used by [#] association(s) including the following association(s):
    [*Association Name (Code)*]
    Do you wish to continue?

Copy Action Items

Added the ability to Copy Action Item workflows.

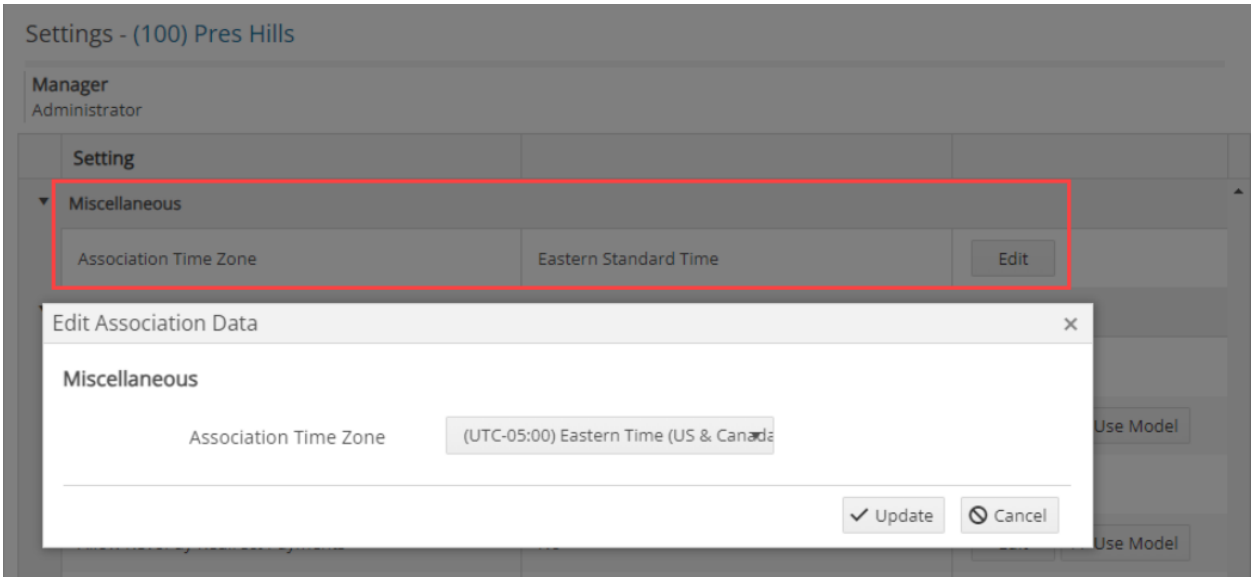
- A **Copy** button has been added to **Settings > Action Type/Steps** which will open the **Copy Action Type** form:
- A new **Action Type** is required to copy successfully.
- All Action Type Settings and Steps will be copied from the original by default.
- The following Action Step Details can be included, if needed, via the accompanying checkbox:
  - Instructions

  - Letter
  - Email
  - Reports
  - Documents
- A **Copy** permission has been added to **Settings > Roles > Security > Action Item > Action Types**.



Time Zone Setting

Association Time Zone was added to the **Association > Settings > Miscellaneous** section.



Vantaca™