

CORES HAN 1.12 Release Notes

These notes describe highlights of the CORES HAN 1.12 release scheduled for Tuesday, July 19, 2022. More information is available through the help in your solution or by contacting Juvare Support at 877-771-0911 or support@juvare.com.

Account Imports

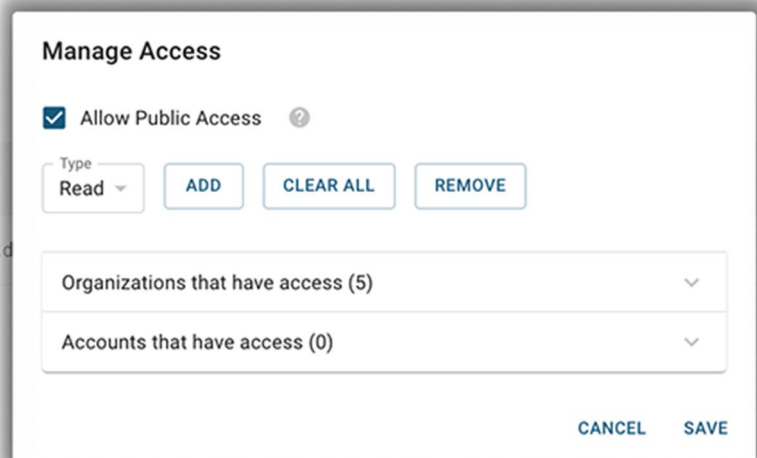
In this release, the account import feature was enhanced, allowing you to:

- Update existing accounts. Now, you can better manage the information on existing accounts, including names, phone numbers, and email addresses, while at the same time creating new accounts. On an account import, the update option can be turned on or off to clearly define the scope.
- Assign organization membership. When adding accounts, you can now assign membership to a specific number of organizations, which is configurable by your administrator. The account is automatically given the default role specified in your solution settings by your administrator.
- Include multiple values in one field. Multiple values are helpful, for example, when you want to include more than one email or phone number or data in custom fields.

Documents and Document Permissions

Now, with the appropriate role or permissions (System Administrator, Client Administrator, or a person with the modify right) you can change account- and organization-level access rights for reading, writing, or modifying folders and files in the Documents section.

Meanwhile, people that have the right to modify a folder or file, but not to manage member access, are restricted when they attempt to view account access information. Similarly, the folders and files to which a person does not have access are visible but appear grey and cannot be opened.



The image shows a 'Manage Access' dialog box. At the top, there is a checkbox labeled 'Allow Public Access' which is checked. Below this, there is a 'Type' dropdown menu currently set to 'Read'. To the right of the dropdown are three buttons: 'ADD', 'CLEAR ALL', and 'REMOVE'. Below these buttons are two expandable sections: 'Organizations that have access (5)' and 'Accounts that have access (0)'. At the bottom right of the dialog are 'CANCEL' and 'SAVE' buttons.