

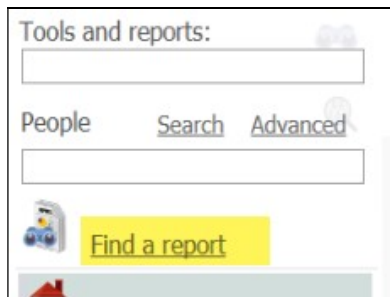
Report Basics Webinar – VSys One

Fall 2022

If you're keeping track of the data in the database, we can get it in a report. The reporting tool in VSys is robust to allow for flexibility and customization to fit your organization's needs. This webinar session will cover navigating the built-in reporting tools in VSys.

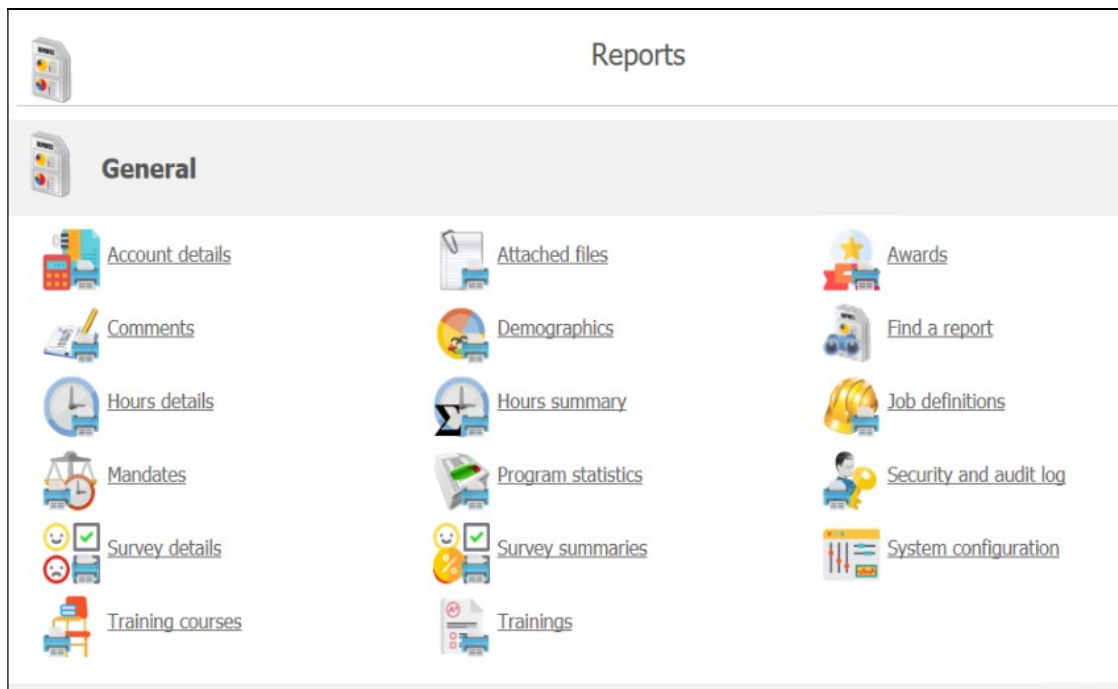
“Find a Report”

This link allows you to search through all the reports (built-in and saved), then load them in the appropriate report section.



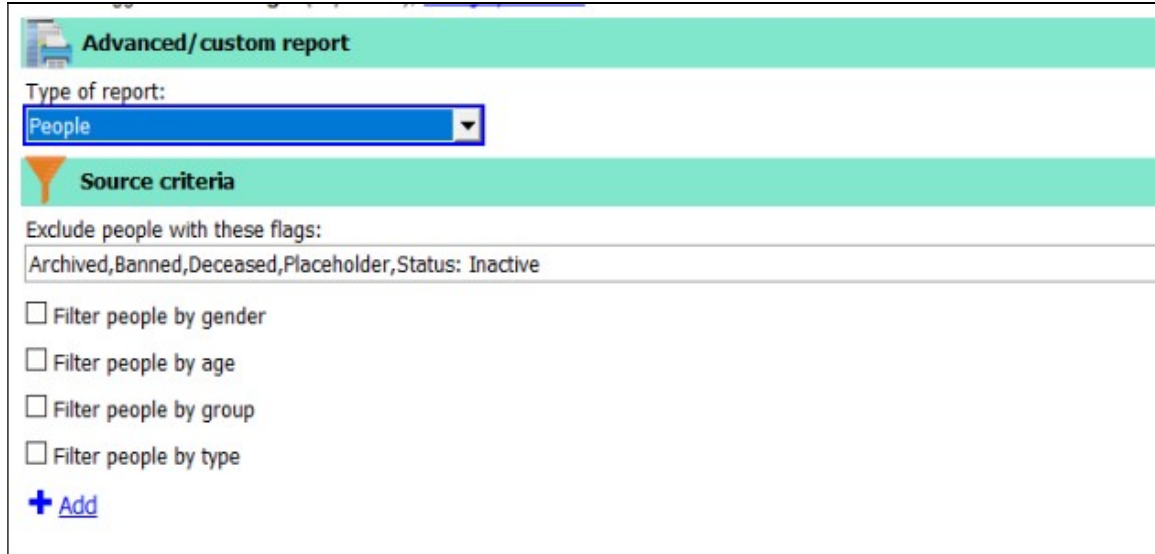
Reports Panel

The report panel is organized by the different categories/types of reports.



Navigating the VSys Reporting Screen

The reporting interface is the same throughout VSys. The interface is made up of four parts – Settings, Tools, Sorting, and Output. There is an optional fifth part, Address types, if address information is included in the report

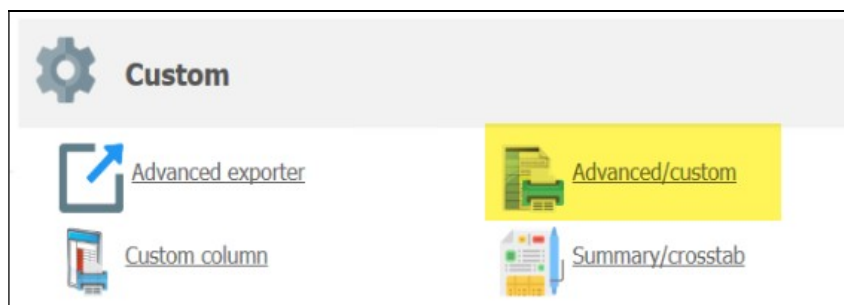


The screenshot shows the 'Advanced/custom report' interface. At the top, there's a teal header with a document icon and the text 'Advanced/custom report'. Below this, a 'Type of report:' label is followed by a dropdown menu currently set to 'People'. Underneath is another teal header with a funnel icon and the text 'Source criteria'. Below this, a text box labeled 'Exclude people with these flags:' contains the text 'Archived,Banned,Deceased,Placeholder,Status: Inactive'. Further down, there are four unchecked checkboxes: 'Filter people by gender', 'Filter people by age', 'Filter people by group', and 'Filter people by type'. At the bottom left, there is a blue '+ Add' link.

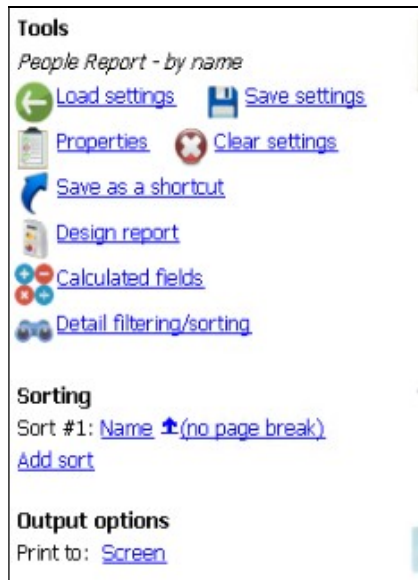
Settings – indicates which kind of report it is.

- Type of report: *Where* you're pulling the data from in the profile (not everywhere)
- Source criteria/Filters: *Who* you're running the report for
 - Quick access filters: Most reports have a few filters built-in to the interface to allow quick access – Exclude people with these flags (Status), Gender, Age, Group and People type.
 - Additional filters: In many reports you will find a blue + Add link. This gives you access to filter on all the different kinds of data fields in the profile. (i.e., Hours history, assignments, DOB, etc.)

Tip: Not getting the + Add link when you need more filters on a report? Try going to the Custom section on the report screen and open it through the Advanced/custom icon.



Tools – This section is where you will find the tools to manage the report. You can save settings, load existing report setups, and design the report layout.



- Load, Save and Clear settings
 - Save as a shortcut
 - Use a header image
 - Design report: customize *what* is printed in the report
 - Calculated fields
 - Detail filtering/sorting
-
- **Sorting** – Set how the results are sorted in the report. Usually alphabetical by name, but you can easily change that under this section.
 - **Output options** – this section allows you to dictate the output format of the report. Default is to give a print preview on screen, but there are many other formats you can save the report in. (i.e., Excel, pdf, rtf, etc.)
 - **Address types (optional)** – you are able to choose which type of address is included in the report you're running

*Tip: Figured out how you want the report to be configured? **Save** it at top left **As a new report**. This won't change the original, and you can then **Load** it when you want it again. Want to share it – make it a public **Bookmark** for all your team.*

Digging deeper into Frequently Used Reports

Some commonly used reports:

- **Advanced/custom**
 - People with address/phone
- **Hours**
 - Details: Reports on hours detailed records
 - Summaries: summarizes number of hours, shifts, volunteers who volunteered
- **Expiring Certifications**
 - Relative dates – dynamic dates that change depending on the day the report is run
- **Program statistics** – includes gains/losses, strength (break down of statuses), hours summary, etc.
- **Demographics**
- **Custom column/Advanced reporting** – reports that are easily customizable using drag/drop feature
- **Assignment calendars (RTF/PDF)**

Other reporting options

- **Printing a report for an individual** – you can also run many reports for one person at a time.
- **Grid contents** - send the contents of what you see on the screen to Excel, RTF (Word), HTML or Tab-delimited text.