

# VSys Technical Webinar - Exporting to Spreadsheets

Fall 2024

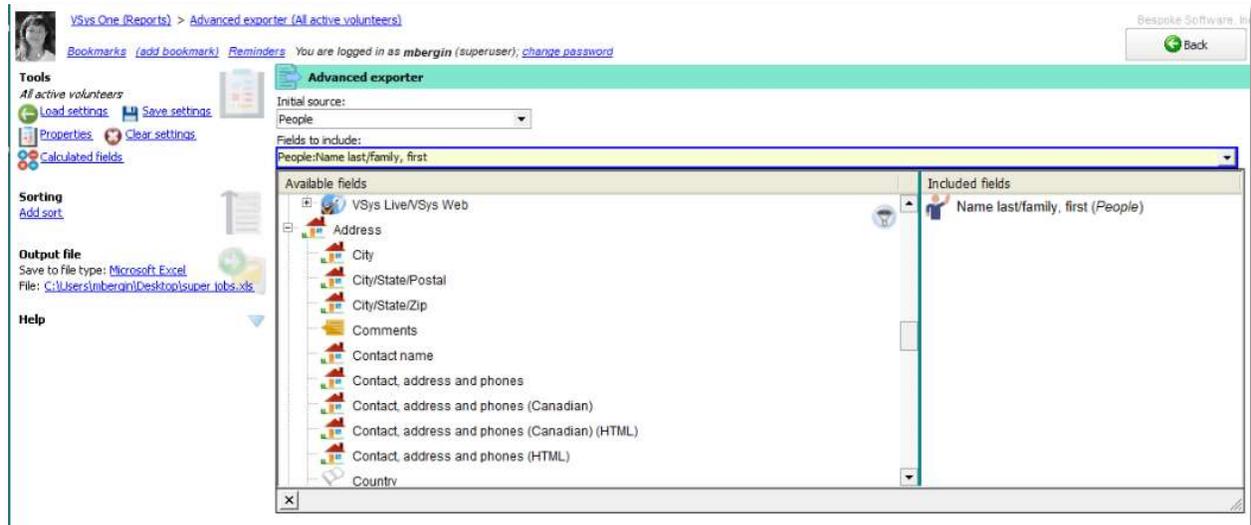
Sometimes you need data in a more flexible format to re-arrange or share. Spreadsheets are a common way to do that. They can be read by either Excel, Google Sheets, or imported into other mapping software. The two most common ways to do this in VSys are through **Advanced Exporter** and **Summary Crosstab reports**.

Either of these sends that data into an export file that you can use in other programs. So instead of printing to Screen, you will need to pick a file type and a place to save the file.



## Advanced exporter

VSys lets you select the fields to be exported and sends that data into an output file that you can use in other programs

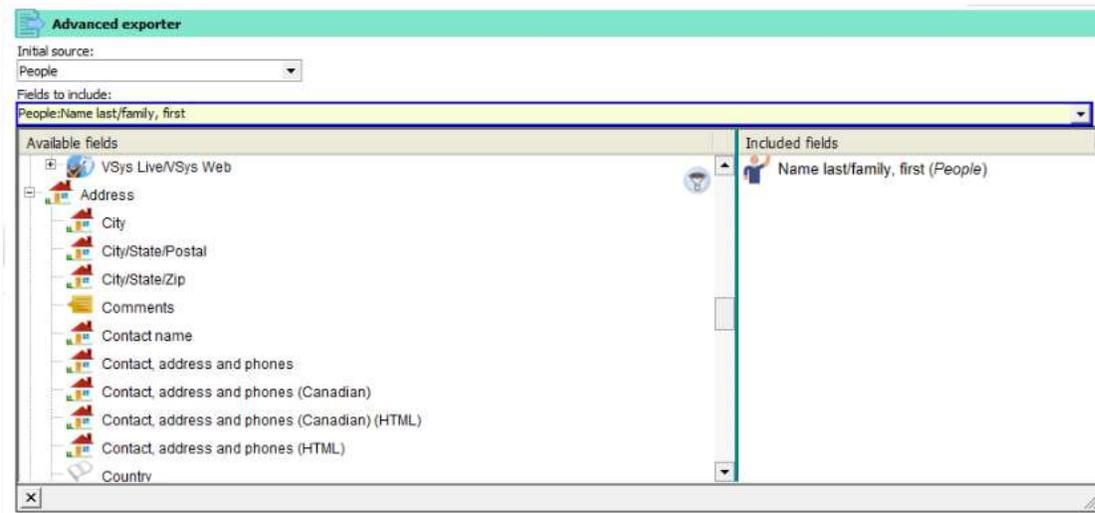


On the left navigation you have the usual report setup options. Some of these will only appear if you have address fields in your export. **Load/Save** and other options all work as with other built-in reports

- **Address types:** If you have a preference as to what type of address for people with more than one address, or to limit it to specific address types, add one or more address types on the left navigation bar. VSys will look for an address of each type starting from the top and use that one if it meets the further criteria below. Adding the fallback address type (**any**) will take any address type that meets the remaining criteria. Putting (**any**) after other address types makes VSys use the others first if available, otherwise whatever other kind it can find. Chose to **Include** or **Exclude** incomplete addresses or records without a matching address.
- **Sorting:** Add one or more sort options to make VSys export the records in a particular order. Note this is not as important in these reports since spreadsheets have their own methods for sorting and reorganizing.
- **Output file:** After setting your filters, fields and sorting options, select the type of file to be created (dBase, Microsoft Excel 2007, Microsoft Excel or Microsoft Access, DIF or tab-delimited) and then name the file to be created.

*Note: When VSys One makes a Microsoft Excel file it does not use Excel to create that file. Doing that would require that you have Excel installed and would usually introduce version compatibility issues. Instead VSys uses a special library to create the .xls/.xlsx files.*

To build your export:



Initial source is the basis for the export and your choices of data to be exported will vary depending on the option you select.

Pulling down the **Fields to include** editor brings up a pair of lists. On the left are the fields you have available to export (Available fields), on the right are the fields that will be included in the export (Included fields). The available fields vary depending on the **Initial Source** selected. These fields are grouped in the same way they are in the Mail merge tool.

- Add a field by dragging it from the left side to the right. In the Included fields in this example, *People* indicates it came from the big category on the left of People, and then the specific fields

last/family, first name within that. (Click on the plus sign in front of *People* to view all the field options.) Each field you drag over will become a column in the export.

- Delete a field by dragging it from the right side back to the left side, or by clicking on the field and hitting the **Delete** key.
- Re-arrange fields by dragging them up and down on the right-hand list. Fields at the top will appear first in the export.
- You can select more than one field at a time by clicking first on one field, then holding down the **Shift** key, click on the last field. Now you can move the selected fields together as a group.

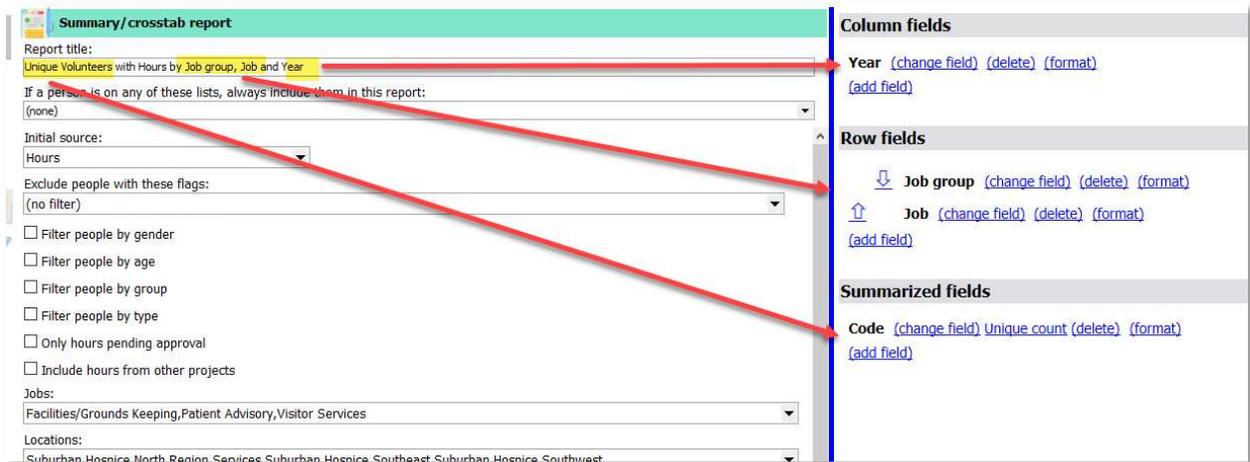
After VSys exports your data, it shows three links:



If you are going to be working from this list (tracking paperwork returned, verifying information) it can be helpful to add those people to a list, so you can “mark” them off in VSys as you are marking off your list.

### Summary crosstab

Summary (crosstab) reports are a special kind of report. They summarize records of various types in a grid format. You define the columns and rows along with the values to be summarized, then VSys totals the values. They are great as comparison report either over years or across volunteer types.



On the Settings panel we have the **Report title**, an **Initial source** of *People* (meaning that people will be the basis for the report and the records we summarize will be people), and any filters on the people themselves. To the right are the fields we're working with:

- The columns of the report will be the variable(s) listed at the top. In this case “Years”, so the years included in the filtering section; one column for each year.
- Rows in this case will be the job group, then broken down by job.
- Summarized fields are the count of unique people (their codes).

For each of these fields we have options to delete, change how they are formatted and how they are calculated.

Note an "\*" at the beginning of a field means that it is a calculated field.

So our results show a grid of the values chosen on the right-side.

Unique Volunteers with Hours by Job group, Job and Year									
	A	B	C	D	E	F	G	H	
1	<b>Unique Volunteers with Hours by Job group, Job and Year</b>								
2			Year:	2020	2021	2022	2023	2024	total
3	Job group	Job	Unique count						
4	[EVAL] Clinic 1	Facilities/Grounds Keeping	4	3	3	3	3	3	4
5	Hospital B	Bilingual/Multilingual Companion					1	3	3
6		Emergency department	3	1			1		4
7		Info Desk Volunteer Team		7	7	7	7	5	7
8		Information desk	17	17	17	17	17	17	18
9		Kids Art Cart	14	13	14	15	15	14	20
10		Pet Therapy Specialist: Dogs	47	48	47	47	47	51	55
11		<i>Subtotal for Hospital B</i>	78	81	80	83	83	83	92
12	Patient Advisory	Region A - NICU Advisory	1	1	1	1	1	1	1
13		Region B - Metro Diversity Advisor	2	2	2	2	2	2	2
14		Region B - NICU Advisory	1	1	1	1	1	2	2
15		Region C - Metro Diversity Advisor	1	1	1	1	1	1	1
16		<i>Subtotal for Patient Advisory</i>	5	5	5	5	5	6	6