

# Tips & Tricks – VSys Anywhere Webinar

Fall 2025

## Main Screen

**Resize your screen** – Quick web browser trick, use the “hamburger” menu in the browser to resize the screen.

**Tool search/ Person search** - The first box will jump you to a specific tool in VSys , the second will jump you to a person (or a drop-down of names, if more than one meets your search criteria.)

**Open link in a new tab/ new window** – Want to follow a link and not lose your place? **Right-click -> Open link in a new tab/ new window**

**Context-sensitive help** - Press the green question mark at any screen to for help for using that screen/tool.

**Settings on dashboards** – Not seeing what you want on a dashboard. Try *Dashboard feed preferences* to see what you can change to fine tune the display.

## Person Lookup/Advanced

**Showing columns**– Do you need different information than what comes up on the default screen? Use the **Additional fields to show** field at the top to add extra info to the grid. Best practice: Turn them off when you’re done, they do affect searching speed.

**Find by name** - Too many names on the list and you didn't make your search specific enough? Instead of re-doing the search, try putting the first name in the search box above the grid. It should narrow it down quickly.

**Bookmark** – Often when you are searching a green bookmark icon will show up – use your browsers bookmarks to save this for reuse if it’s a common search.

**Share the search** – If you click bookmark, and see RECOVER in the middle of the URL at the top, you can share that search/tool with another user. Copy the URL and send via email/chat to share. They will need to open it and then save it in their settings.

## Table tools

**Reordering the screen** - Do you want it sorted in a different order? Click on the column headers to re-sort. Look for the little arrow indicator to know which is being sorted.

**Checkboxes** - Clicking on these select the people for the **Actions** button at the top of the grid. The **Checkbox** button checks all, the **Eraser** button un-checks all.

**Actions button** – In many places where you have a list of people, you can click on the **Action** button to go into a part of the volunteer’s profile without opening the entire profile.

**De-duping people** - If you have the same real-world person in VSys more than once, you can combine the two VSys people together to form a single person. Use the **Actions** button -> **De-duplicate with another person**. Start with the person you want to keep, and then select the one to be merged in. You can only combine two people at a time. If the same person is entered in VSys three times, combine them in two stages: combine #1 and #2, then the result of that with #3.

**Printing the Grid** - If everything you want is in the grid on the screen, you can print it directly.

Print - This prints it as the HTML page you are viewing.

Excel - This exports a column on the screen to a column in Excel for all the columns in the grid.

PDF - Generates a PDF file that can be saved/printed/shared. (You can change the format of the paper to landscape to get more columns on the paper.)

### Quick communication vs. Mail merge

**Quick communication - From the people search/lookup:**

- Can be on-demand or use a letter template
- Email with up to 3 attachments

**From the mail merge:**

- Only uses a letter template (can include personalized fields)
- Can be mixed sending/printing
- Attachments need to be uploaded first, but can build library
- Multiple attachments accepted
- Needs to be verified before sending

### General tools – Inline vs Pop-up

If you see two versions of a tool, one is probably Inline and one is probably pop-up. Both of the examples below show the **Awards manager**.

The **inline** version allows you to change specific elements of what’s in the grid (look for the little green pencil icon.) Remember to **Save** when you are done!

| Search: <input type="text"/>           |                     |            |            |                   | Print          | Excel                         | PDF         |
|--|---------------------|------------|------------|-------------------|----------------|-------------------------------|-------------|
| ↑ Recipient                            | Award               | Nominated  | Awarded    | Status            | Lifetime hours | Send a letter                 | Delete      |
| <a href="#">Calderon, Milton</a> View  | 10 years of service | 01/27/2025 | 04/17/2025 | Status<br>Awarded | 11682          | <a href="#">Send a letter</a> | (unchanged) |
| <a href="#">Davis, Patricia R</a> View | 10 years of service | 01/27/2025 | 04/17/2025 | Awarded           | 563            | <a href="#">Send a letter</a> | (unchanged) |

The **pop-up** version, will most likely have checkboxes and an **Actions** button at the top to change multiple things at once. To change a single thing, you will need to open the **Edit** link where a window to make the changes will pop-up.

| Search: <input type="text"/>   |                      | Print               | Excel      | PDF        | Actions |                |                               |
|--|----------------------|---------------------|------------|------------|---------|----------------|-------------------------------|
| ↑ Recipient  |                      | Award               | Nominated  | Awarded    | Status  | Lifetime hours | Send a letter                 |
| <input checked="" type="checkbox"/> <a href="#">Calderon, Milton</a> | <a href="#">Edit</a> | 10 years of service | 01/27/2025 | 04/17/2025 | Awarded | 11682          | <a href="#">Send a letter</a> |
| <input type="checkbox"/> <a href="#">Davis, Patricia R</a>           | <a href="#">Edit</a> | 10 years of service | 01/27/2025 | 04/17/2025 | Awarded | 563            | <a href="#">Send a letter</a> |

## Reports

**Who's Late and Who's missed their assignment** (filters and reports) - Do you have people who are chronically late or missing assignments? These reports and filters will allow you to track those people.

**Properties -> Favorite** – Mark your favorites to keep the ones that you want to use again. Then you can delete out the ones you didn't like.

**Scheduling reports (upcoming) –**

- Must be ready to run with just clicking “run again” – if you have to modify it won't be what you want.
- Use Relative dates if it takes place over a time period