Tips & Tricks – VSys One Webinar

Fall 2025

Main Screen

Red boxes – Yellow Boxes
> **Red boxes –** Please contact VSys Support (support@vsysone.com). That's a warning.
> **Yellow box –** Processes/notifications that need your attention

User preferences - These are person specific, and control how VSys looks.
(Melissa's favorites: **Prevent Back Button From Becoming Close**/**Show a Confirmation Prompt When Closing**.)

Tool search/ Person search/Find a Report - These first box will jump you to a specific tool in VSys , the second will jump you to a person (or the person look-up if more than one meets your search criteria.).

Breadcrumbs - Hover over a breadcrumb along the top of a screen and see what that screen looked like when it was last used. Or use them to jump back a screen or two in VSys.

Context-sensitive help - Press the **F1** key at any screen to bring up help for using that screen/tool. Or look for the green question mark. (Click the down-arrow after **Help**, to open the panel if it is closed.)

Panel – Get Support – If our support team asks for your version number, it will be in this panel.

Person Lookup/Advanced

Excluded Status - In the Person Lookup tool, if 1 or more people are excluded due to their status, the message informing you about this will include a hyperlink that allows you to repeat the search without those status filters. (and the "Exclude" list is unchanged)

Showing columns– Do you need different information than what comes up on the default screen? Right-click anywhere in the grid and select **Show Columns.**

Reordering the screen - Do you want it sorted in a different order? Click on the column headers to re-sort.

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 in the left navigation bar. It should narrow it down quickly.

Attachments -In the person lookup tool, you can drag & drop files directly onto a person to add them as attachments to that person.

Right Click Tips (In the Person Lookup) - "Right Click is Your Friend". Your right-click mouse button gives you additional options on most screens throughout the software.

All, None and **Reverse -** Clicking on these checks all, un-checks all, or reverses the checks for all of the items in one quick operation.

Shortcut options to person editor – In many places where you have a list of people, you can right-click and select **Edit this person** to go straight to the volunteer's profile to make changes without searching again in the Person Lookup tool. Depending on where you are the language may be a little different – for example, in the training courses, the option is to **Edit entrant**.

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 with the **Person De-dup Wizard**. 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.

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

       HTML - This generates an HTML page. (Generally not the most useful format.)

       RTF - Generates a file that can be opened and worked with in Word. The limitations are that you will only get as many columns as will fit on your page of paper. (You can change the format of the paper to landscape to get more columns on the paper.)

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.

Advanced Exporter vs Print to Excel - One of the options for printing is the option to print to Excel. While this option is there, more complicated reports do not transfer cleanly to Excel depending on the format and columns. If you need to manipulate your VSys data in Excel you are better off using the **User tool -> Advanced Exporter**. From the menu on the left drag the columns you want on to the right. Drag any you don't want back to the left. Drag them up and down in the list to change the order. Each data field on the right will become a column in Excel.

Menus

Most drop-down menus in the system are configured in the Setup menu. From there you can add additional options or hide existing options. **Changes here affect everyone in the system.** Have a good backup first!

A few things to note:

       Disabling/inactivating a value will appear blank for the volunteer. It will not delete the option, but it will not show on the volunteer's profile.

       Deleting a value will remove it from everywhere (with no undo button)

       Many menus have a Merge option, this is generally a better option than straight deleting. Again, no undo button.