Reporting Webinar – VSys One
July 2016

If you're keeping track of the data in the database, we can definitely get it in to 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.

Reports Panel

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

- **"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.

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

- **Settings** – indicates which kind of report it is.
  - <u>Type of report:</u> *Where* you're pulling the data from in the profile (not everywhere)
  - <u>Source criteria/Filters</u>: *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 link for "Add another filter". This gives you access to filter on all the different kinds of data fields in the profile. (i.e., Hours history, assignments, DOB, etc.)
- **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.
  - <u>Load, Save and Clear settings</u>
    - Save as a shortcut
  - <u>Use a header image</u>
  - <u>Design report</u>: customize *what* is printed in the report
    - Calculated fields
  - <u>Detail filtering/sorting</u>
- **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

Digging deeper into Frequently Used Reports

We will go more in depth on examples of these reports.

- **Advanced/custom**
  - o People with address/phone
- **Hours**
  - o Details: Reports on hours detailed records
  - o Summaries: summarizes number of hours, shifts, volunteers who volunteered
- **Expiring Certifications**
  - o 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.