Reporting Webinar –VSys One
October 2012

Navigating the VSys Reporting Screen

VSys reporting screens are made up of 4 parts – Settings, Tools, Sorting, Output and an optional fifth part – Address types.

Settings – Settings tell the program all about the report. This many include content options and/or filters.

> Content Options – Allow you define which pieces of information print on the report and/or the format for that information.
>
> Filters – Filters tell the program how to pick and choose which information will come out in the report. This only selects the information from the database – it does not mean this information is going to actually print on the report.
>
> - Built-in filters – Many reports have built-in filters in the form of drop-down menus in the report. These are for big classifications of filtering (group, volunteer type, people type, exclusions.) We have tried to build these in for the most common needs.
>
> - Filters you add – In many reports you will find a blue link for Add another filter which will allow you to select more options for filtering. If you do not see it on a report, try going into Advanced/custom and looking for the report there. Sometimes that will bring up extra options.

Sorting – Sorting determines how the data will be organized as it comes out to the report. Do you want it to be organized by the person's last name? Maybe for mailing labels you want it to be organized by zip code.

Output options – This tells VSys how you want the report "printed." It may be to a physical printer or it may be to some type of file to be e-mailed or used in another program.

Results – Results are how the data you have chosen is displayed. For what we will be working with today these are the built-in reports, some of which can be easily customized from the report while others require the report designer to customize.

Address types – If the report you are working with includes addresses this section will appear for you to select the type of address(es) you want on the report.

Tools – Once you get a report like you need it, you will want to save it so that you can use it again. The tools section allows you to Load, Save and Clear reports.

How do I find the report I want?

<u>Help me find a report link</u> –

Along the top of the report panel there is a **Help me find a report** link. Use this link to narrow down the lists of reports based on a keyword.

Quick tip – How do I know where to look? Try phrasing what you want to know as a statement "I want to know which volunteers have….", "I want to know what Awards….". Most of the time this will get you where you need to start.

<u>People reports:</u>

     People (just a list of names)

     People with address/phone

<u>Hours Reports:</u>

Quick tip: Some folks ask what the difference is between "Summary" and "Detail" Reports. For "Summary" think "Sum->Math->Numbers" – a Summary report will give you numbers or totals of things. A "Detail" report will give you the specific items.

     <u>Hours Details</u>

          Hours details by Volunteer

          Hours total by volunteer: current period + lifetime (advanced/custom)

     <u>Hours Summary</u>

          Monthly Hours Summary

          Quarterly Hours Summary

<u>PDF Only reports:</u>

     Program statistics report

     Demographics report

<u>RTF reports:</u>

     Assignment calendar RTF

<u>Reports for an individual person</u> – In the Person Lookup tool, right click on the person's name and select the report. You can also select multiple people from the list and right click- to print reports for all of them. Or add them to a list to print later. Note: this will automatically print with the default settings for this report.

     Profile report

Custom Column reports:

Where custom columns are good – when you need a lists with different types of data. You can drag and drop what columns you want to appear on the report.

First look at a built-in one –

- Job assignments and associations – note on the left-side there is no sorting, so it will come out in random order until you add a sort order.

Then we build -

- Four column report showing Volunteer's name, service hours this year, Lifetime hours, Awards last year. (Based on Awards)

Quick tip – Do you need to e-mail a copy of a report to someone? Change the "Print to:" option in the report setup to "PDF for e-mail". This is will create it as a PDF and will attach it to an e-mail for you to send.