

## Reporting Webinar – VSys One

### April 2014

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 reporting tools in VSys.

### Reports Panel

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

- **Most frequently used report sections**
  - Advanced/custom
    - Name/Address report
  - Assignment calendars (RTF/PDF)
  - Custom column
  - Demographics
  - Expiring Certifications
  - Hours
    - Details
    - Summaries
  - Program statistics
- **“Help Me 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.
  - Type of report: *Where* you're pulling the data from in the profile
  - Source criteria/Filters: *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.
  - Load, Save and clear settings
    - Save as a shortcut

- Design report: customize *what* is printed in the report
  - Calculated fields
- Detail filtering/sorting
- **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**
  - Name/Address report
- **Assignment calendars (RTF/PDF)**
- **Custom column** – reports that are easily customizable using drag/drop feature
- **Demographics**
- **Expiring Certifications**
  - Relative dates – dynamic dates that change depending on the day the report is run
- **Hours**
  - Details: Reports on hours detailed records
  - Summaries: summarizes number of hours, shifts, volunteers who volunteered
- **Program statistics** – includes gains/losses, strength (break down of statuses), hours summary, etc.

## Other reporting options

- **Printing a report for an individual** – you can also run many reports for one person at a time.
- **Advanced exporter** – this tool is used to export data into an excel spreadsheet.