

Tips & Tricks – VSys One Webinar

Spring 2014

Main Screen

Rebuild Indices – Periodically, internal database indices get out of date and need to be rebuilt. Use the **Rebuild Lookup Indices tool** (under the **Administrator tools** panel) to rebuild various lookup indices within the database. This should be run in full every three days to ensure that your lookup indices and other values are up-to-date. If you get a message on the left navigation bar it's overdue. This can be setup to be a scheduled task.

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 - 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.

Person Lookup

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.)

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 - "Right Click is Your Friend"

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.)

People

Look-up tool to jump to the part of the profile - Search to jump to the part of the profile you want.

Teams - When dealing with groups of people who are unlikely to volunteer on their own, always work as part of a team and may have varying sizes and memberships, it's not convenient to make a new person record in VSys for each volunteer. Marking a person as a team of people makes this person the sole point of contact for multiple people whose names and information you don't track individually.

Relationships - Relationships are used to indicate the connections from one person to another or a person to a group. Most relationships are two-way, meaning that they will show up on the screens of both connected entities (people or groups). For example, under "Jane Doe" if you show that "Jimmy Doe" is her son, on Jimmy's screen, you'll see "Jane Doe" listed as his parent.

Resize, cropping photos – VSys has built in tools to help you resize, crop ,and rotate pictures of your volunteers.

Save and stay here/Save and close – When the **Save** button is visible in the upper-right corner of the screen, clicking **Save** alone saves what you’re working on and takes you back one level. On many screens, if you hold down **Save** for a half-second without releasing it, a popup menu will appear offering you the choice of **Save and close** or **Save and stay here**. This lets you save your changes without having to come back into the current screen. As an even shorter shortcut, hold down the left **Ctrl** key on your keyboard while clicking **Save**. VSys will save your data but not go back and won't show the popup menu.

Type into drop-downs - For most drop-down menus, you can just begin typing and it will reduce down the option you want. This is useful if you have a lot of options and you know the name of the option that you want that is near the bottom of the list; easier than scrolling.

Addresses

Emergency contact – Note: best place in address not alerts - An address with the type of **Emergency contact** will never be used by VSys for mailings unless it's specifically selected in that mail merge. There is now a comment field exclusive to this information for things such as a language spoken at home.

Zip code lookup in person editor (F2) - When your cursor is in any of the address fields, hitting the F2 key brings up a prompt for a postal/zip code. Entering one here will fill the CITY, STATE/PROVINCE and ZIP/POSTAL fields automatically if VSys knows this postal/zip code.

Note: This search only works if your zips table is up-to-date. If you don't get the results you expected, go to the **Administrator tools** panel from the main VSys screen and click on **Check for zip/postal code** updates. Speaking of which, when was the last time you updated your zips table. The new table was uploaded earlier this year, have you downloaded it. The US one is small, the Canadian one may take a while to download.

Preferred e-mail/cell - Add a preferred e-mail address by clicking the (none) link at the end the Preferred E-mail field at the top of the address screen. A drop-down menu will appear with the valid choices. Only options of the type "e-mail" will appear.

Set address status as "invalid" or for a date range – Do you have "snowbirds" or other volunteers with different addresses at different times of the year? Put all the addresses into VSys and mark when each is valid. VSys will pull the appropriate address when doing mail merges.

Mark email/phone number as "bad"- To mark a phone number as a known bad number, right-click on the number and select **Known bad**. Bad phone numbers and e-mail addresses show in red in the address panel.

Shared addresses - VSys gives you the option in a mail merge to send only one letter to multiple people at the same address. To do this you need to "share" the addresses. Open an address and click the (edit sharing) link. Tell VSys who shares this address and

Copy-Paste (Ctrl/C - Ctrl/V) - In many places in VSys you can copy and paste information even if there isn't a right-click option. Use the Windows controls of **Ctrl/C** to Copy and **Ctrl/V** to Paste.

Tools

Copy e-mails from a list - From inside the List Manager you can right-click on a list and have the option to copy the e-mails for all the people on the list.

Training courses becoming Certifications - In the setup of a subject, you can make it so that the successful completion of a course of this type becomes a certification as well.

Setup

System preferences:

Default - Set the groups/type/status for newly created people to reduce your data entry.

Feature enabling – While you want to have the features you are using checked here, if you are not using it, uncheck it. This will reduce some of the options that you see that are not applicable to your organization. All the data from these features will be retained if you turn it off, so you can't really do any damage. And they can be turned back on at any time.

Jobs - If you have volunteers who have been doing the same job for years and will continue to do them, then allow extension of assignments for longer than the default number of days. (Maximum allowed – 3653 days = 10 years) Note: this will take more memory in your system.

Advanced – There are more clean-up features in the Advanced section.

- 1) Bonus hours
- 2) People as teams
- 3) Hide additional types and groups
- 4) Prevent [Back] button from becoming [Close]/Show a confirmation prompt when closing.
(system-wide settings, individual in user preferences)
- 5) Allow single character family names
- 6) Split scan PDFs
- 7) Label printing – columns or rows
- 8) Hiding reports

Customizing drop-downs - Many of the drop-down menus in a person's profile can be modified so that you only see what you are using. The menu areas are found in the **Setup** menu. For example, going into the **Volunteer Source** menu, you can add or subtract options. To add use the **Add** link on the left navigation bar or click one of the options you don't plan on using and rename it. (Keep in mind if anyone has this value then it changes it for that person.) To remove an option, **right-click -> Make inactive**. Making all the options in the menu inactive will make it disappear. Other menus work similarly. (Note: you cannot do this for Groups, a person must have a group.)

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.

Dates

Entering Dates - You can enter a date in a date field by either typing in the date or by selecting the date from a drop-down calendar. - *For example, 030907 will be converted to 03/09/2007.*

Relative Dates - Some date fields allow you to enter what are called relative dates. These are dates which are stored as offsets instead of fixed values. What does this mean? Consider the example of a report from which you want all new volunteers in the last thirty days. If you run the report on the first of each month, relative dates allow you to pick a time period from the current day. So instead of resetting the date filters each time you run the report, you can set it up once for a window of the previous 30 days.

*Not all date fields support relative dates. In these cases the **R** key does nothing and neither does the right mouse button.

Today - A quick trick for typing in today's date, just type in the letter "t" and the date will fill in for today. (Doesn't work everywhere, but works in most date boxes.)

Tools for administrators

Security user photos - When security is enabled, if the security user (as a person) has a photo, that photo will be shown in the upper-left corner of the screen. If not, and the user is a superuser, then the "secret agent" icon is shown.

Message when users log in - Send your users a message or reminder when they login. **Administrator tools -> Security Manager -> Login notice.**

Remote session termination tool - If for some reason you need to kick someone out of VSys, **Administrator tools -> Concurrent users monitor/who's logged in**, then right-click on the user and select **Terminate this session.**

Technical

Make Regular Backups - Administrator tools -> Backup your data. This can also be setup to be a scheduled task.

Make a Local Backup of VSys One in Another Folder - This tool backs up your current data to a folder that you designate, copies VSys One and its configuration file into that folder, and sets up a copy of VSys so that you can work with a copy of your main database in a safe place. Use this for training purposes, evaluating a new version of VSys One without affecting your production database, or testing a potentially dangerous process, e.g. the Bulk Entrant Value Updater, without endangering your data.

Administrator tools -> Make a Local Backup of VSys One in Another Folder. Note: Make sure you direct it to a folder and not just to your desktop. If you send it straight to your desktop, you'll get 20+ little files that are the tables and you'll have a mess.