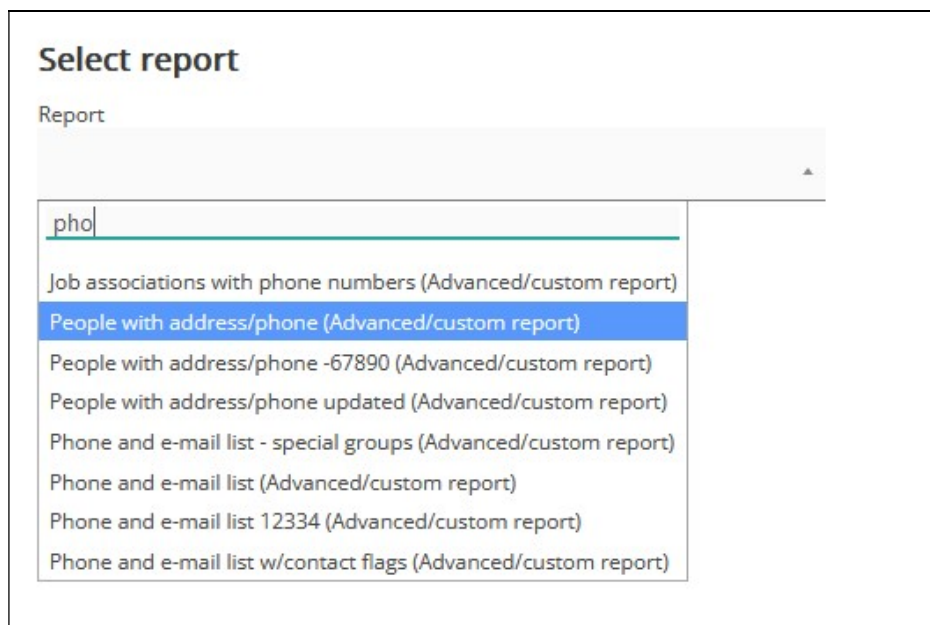


## Report Basics– VSys Anywhere Summer 2024

If you're keeping track of the data in the database, we can get it in a report! This webinar session will cover navigating the built-in reporting tools in VSys Anywhere<sup>1</sup>.

### Select report

This link allows you to search through all the available reports, then select one. Like other menus, start typing the keyword.



The screenshot shows a 'Select report' dropdown menu. The search bar contains the text 'pho'. The dropdown list displays the following options:

- Job associations with phone numbers (Advanced/custom report)
- People with address/phone (Advanced/custom report)
- People with address/phone -67890 (Advanced/custom report)
- People with address/phone updated (Advanced/custom report)
- Phone and e-mail list - special groups (Advanced/custom report)
- Phone and e-mail list (Advanced/custom report)
- Phone and e-mail list 12334 (Advanced/custom report)
- Phone and e-mail list w/contact flags (Advanced/custom report)

### Navigating the VSys Reporting Screen

The reporting interface is the same throughout VSys Anywhere. The interface is made up of several parts – Report settings, People, Sorting, and Filters. These may vary slightly depending on the type of report.

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<sup>1</sup> Please remember, VSys Anywhere is customized on a client-by-client basis. Your menu may look slightly different. If so, try the tool search at the top to find “Select a report” or other tools.

- **Report settings** – indicates which kind of report it is. Change the title or have the report emailed to you.
- **People** - *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.
  - Addresses: You are able to choose to include people without addresses, or which type of address is included in the report if the report includes addresses.
- **Sorting** – Set how the results are sorted in the report (by which information, defaults to name on most)

- **Filters** – Filters here are just like the Advanced Criteria searches in people. The **Add filter** button gives you access to filter on all the different kinds of data fields in the profile. (i.e., Hours history, assignments, DOB, etc.)

**My Reports** – available on the My reports page, or on your home page.

Submitted	Download	Status	Completed	Cancel
11/15/2022 08:08AM	<a href="#">Missing CPR Properties</a> <a href="#">Run again</a>	Submitted		<a href="#">Cancel</a> <a href="#">Delete</a>
09/19/2022 01:26PM	<a href="#">Survey Summaries</a> <a href="#">Forward results</a> <a href="#">Properties</a> <a href="#">Run again</a>	Finished; 10 records	09/19/2022 01:31PM	<a href="#">Delete</a>
09/19/2022 01:25PM	<a href="#">Survey Result Details</a> <a href="#">Forward results</a> <a href="#">Properties</a> <a href="#">Run again</a>	Finished; 10 records	09/19/2022 01:31PM	<a href="#">Delete</a>
07/18/2022 01:40PM	<a href="#">E-mail Birthday Greeting HTML (Happy Birthday to a Great Volunteer)</a> <a href="#">Confirm/reject 70 letters Properties</a> <a href="#">Run again</a>	Finished	07/18/2022 01:50PM	<a href="#">Delete</a>

- **Report name:** Click here to view the report. (No link? Your report hasn't finished)
- **Properties:** About the report, find the "favorite" option here
- **Forward results:** Send finished report to another person
- **Run again:** Open the settings/filters used to run with the same criteria again

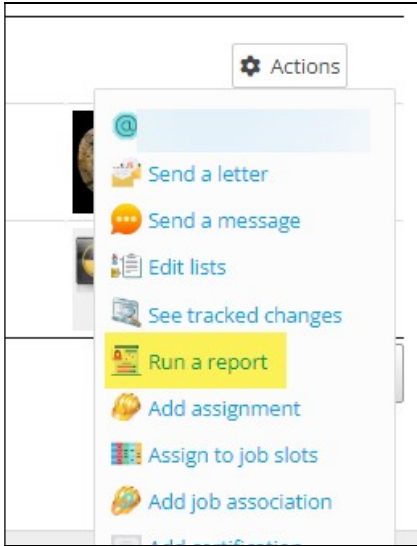
## Digging deeper into Frequently Used Reports

Some commonly used reports

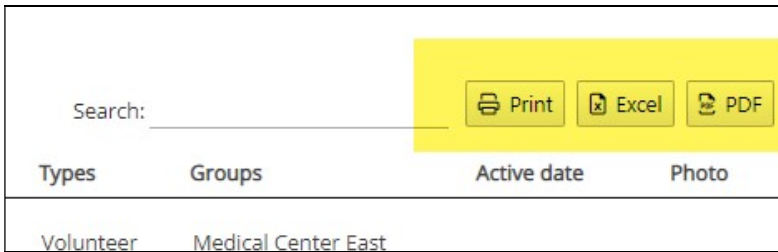
- **Advanced/custom**
  - People with address/phone
- **Hours**
  - Details: Reports on hours detailed records
  - Summaries: summarizes number of hours, shifts, volunteers who volunteered
- **Expiring Certifications**
  - Relative dates – dynamic dates that change depending on the day the report is run
- **Program statistics** – includes gains/losses, strength (break down of statuses), hours summary, etc.
- **Demographics**
- **Custom column reports**– reports that are easily customizable using drag/drop feature
- **User configurable reports** – reports for you created by your organization
- **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 (try Hours details by volunteer or one of its variants, or Profile report).



- **Grid contents** – At the top of many grids there are buttons to send the contents of what you see on the screen to your printer, Excel, or PDF.



*Tip:* Need one more piece of information? Use the “add a field” feature at the top to add one or two more pieces of information for your print. Just remember to take them off when you are done so you don’t slow yourself down on the next search.