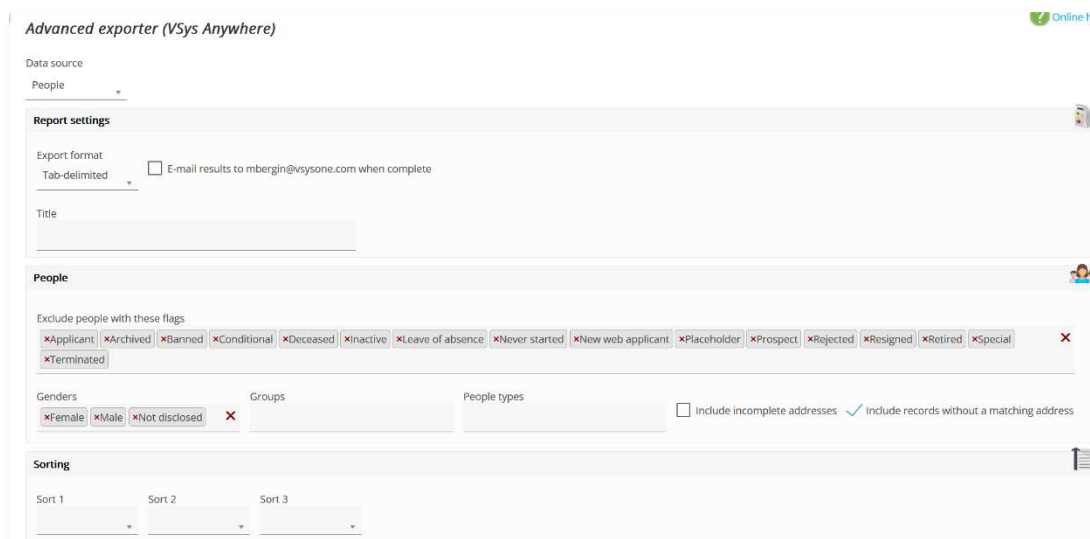# VSys Technical Webinar - Exporting to Spreadsheets (VSys Anywhere)

Fall 2024

Sometimes you need data in a more flexible format to re-arrange or share. Spreadsheets are a common way to do that. They can be read by either Excel, Google Sheets, or imported into other mapping software. The two most common ways to do this in VSys are through **Advanced Exporter** and **Summary Crosstab reports**.

Advanced exporter

VSys lets you select the fields to be exported and sends that data into an output file that you can use in other programs

At the top you have the usual report setup options. Some of these will only appear if you have address fields in your export. Options all work as with other built-in reports

- **Data source** is the basis for the export and your choices of data to be exported will vary depending on the option you select.
- **Export format:** Either of these sends that data into an export file that you can use in other programs. So instead of printing to Screen, you will need to pick a file type. Select the type of file to be created (Comma-delimited, Microsoft Excel 2007, Microsoft Excel or Tab-delimited) and then give it a Title.
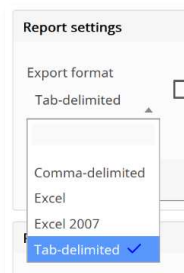
- **Address types:** Chose to **Include** or **Exclude** incomplete addresses or records without a matching address.
- **Sorting:** Add one or more sort options to make VSys export the records in a particular order. Note this is not as important in these reports since spreadsheets have their own methods for sorting and reorganizing.

Note: When VSys One makes a Microsoft Excel file it does not use Excel to create that file. Doing that would require that you have Excel installed and would usually introduce version compatibility issues. Instead VSys uses a special library to create the .xls/.xlsx files.

To build your export:
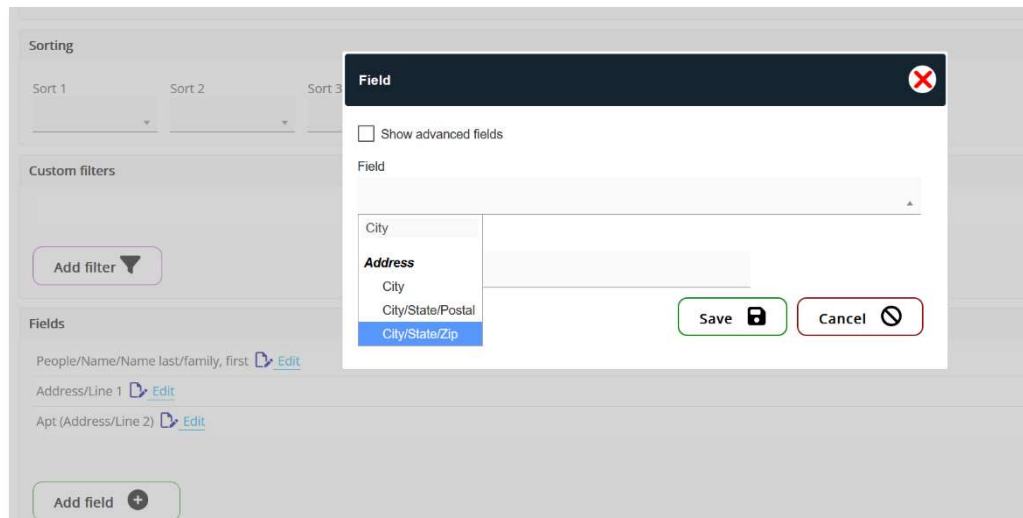
Use the **Fields section** to select the fields that will be included in the export. The available fields vary depending on the **Data Source** selected. These fields are grouped in the same way they are in the Mail merge tool.

- Add a field by using the **Add field+** button. In the Fields in this example, *People* indicates the first field came from the big category of People, and then the specific field *Last/family, first name* within that. The next fields come from the *Address* category. Each field you add will become a column in the export.

- Delete a field by clicking on **Edit** and then the **Delete** checkbox.

- Re-arrange fields by dragging them up and down on the list. Fields at the top will appear first in the export.

- The options in **Add field+** are deliberately limited to the most common fields in that data source. If the field you are looking for is not there, or you are looking for more detail, try clicking the **Show advanced fields** checkbox.
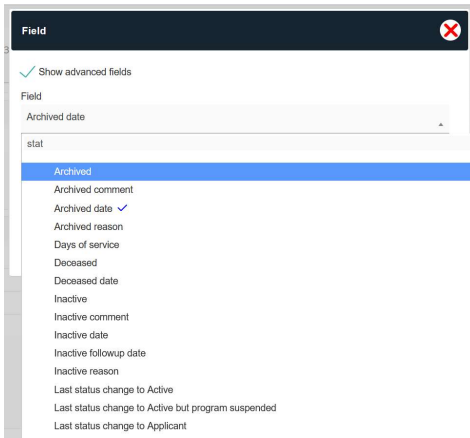
After VSys exports your data, treat it like any other report. You can **Favorite** reports you want to keep and share exports with the **Run again** link and URL.

Summary crosstab

Summary (crosstab) reports are a special kind of report. They summarize records of various types in a grid format. The columns and rows show the values along with the values to be summarized, then VSys totals the values. They are great as comparison report either over years or across volunteer types.

Summary (crosstab) reports cannot be edited in VSys Anywhere, but you can use all your standard filtering for these reports.

A1		fx	Unique Volunteers with Hours by Job group, Job and Year					
	A	B	C	D	E	F	G	H
1	*Unique Volunteers with Hours by Job group, Job and Year*							
2			Year: 2020	2021	2022	2023	2024	total
3	*Job group*	*Job*	Unique coun	Unique coun	Unique coun	Unique coun	Unique coun	Unique count
4	[EVAL] Clinic 1	Facilities/Grounds Keeping	4	3	3	3	3	4
5	Hospital B	Bilingual/Multilingual Companion				1	3	3
6		Emergency department	3	1		1		4
7		Info Desk Volunteer Team		7	7	7	5	7
8		Information desk	17	17	17	17	17	18
9		Kids Art Cart	14	13	14	15	14	20
10		Pet Therapy Specialist: Dogs	47	48	47	47	51	55
11		*Subtotal for Hospital B*	78	81	80	83	83	92
12	Patient Advisory	Region A - NICU Advisory	1	1	1	1	1	1
13		Region B - Metro Diversity Advisor	2	2	2	2	2	2
14		Region B - NICU Advisory	1	1	1	1	2	2
15		Region C - Metro Diversity Advisor	1	1	1	1	1	1
16		*Subtotal for Patient Advisory*	5	5	5	5	6	6

Most useful Summary (crosstab) reports (in Melissa's opinion):

- Unique Volunteers with Hours by Job group, Job and Year
- Application processing times analysis
- Letter template usage summary
- Hours summary yearly by volunteer (also available quarterly and monthly)
- Volunteer Counts by Active Status and Year Started
- Active Status Transitions Summary