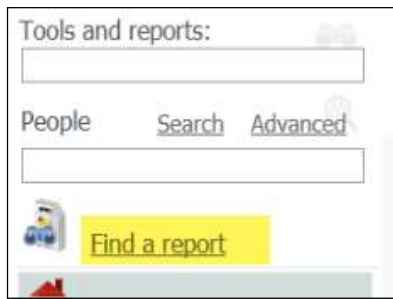


## Report Basics Webinar – VSys One Summer 2024

If you're keeping track of the data in the database, we can get it in 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 built-in reporting tools in VSys.

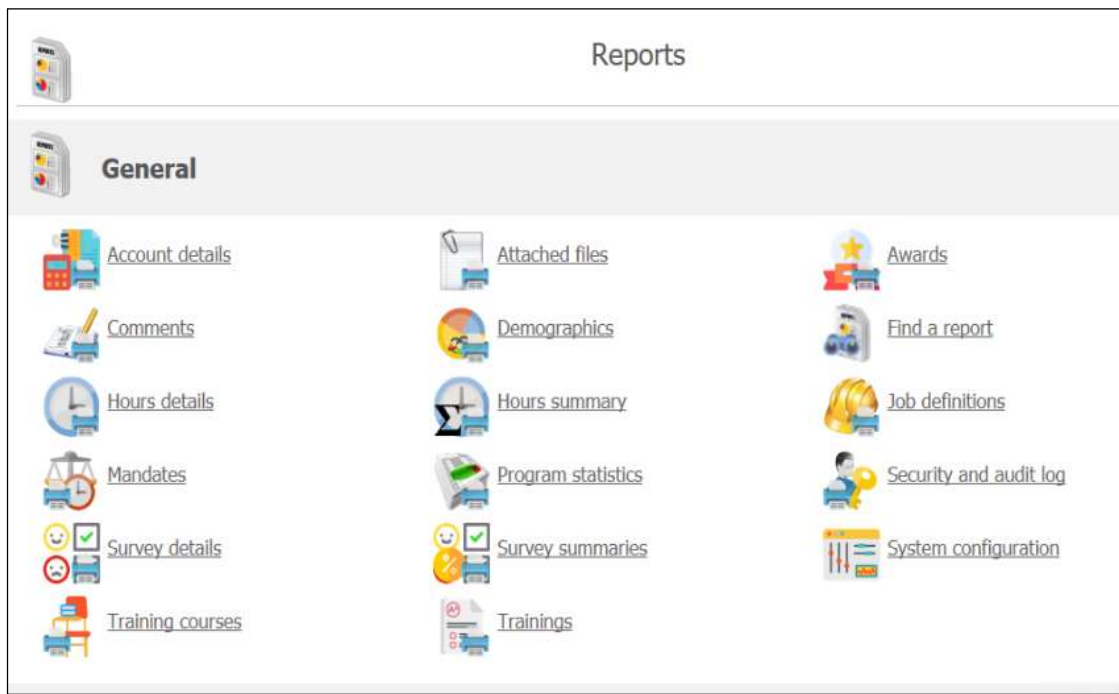
### “Find a Report”

This link allows you to search through all the reports (built-in and saved), then load them in the appropriate report section.



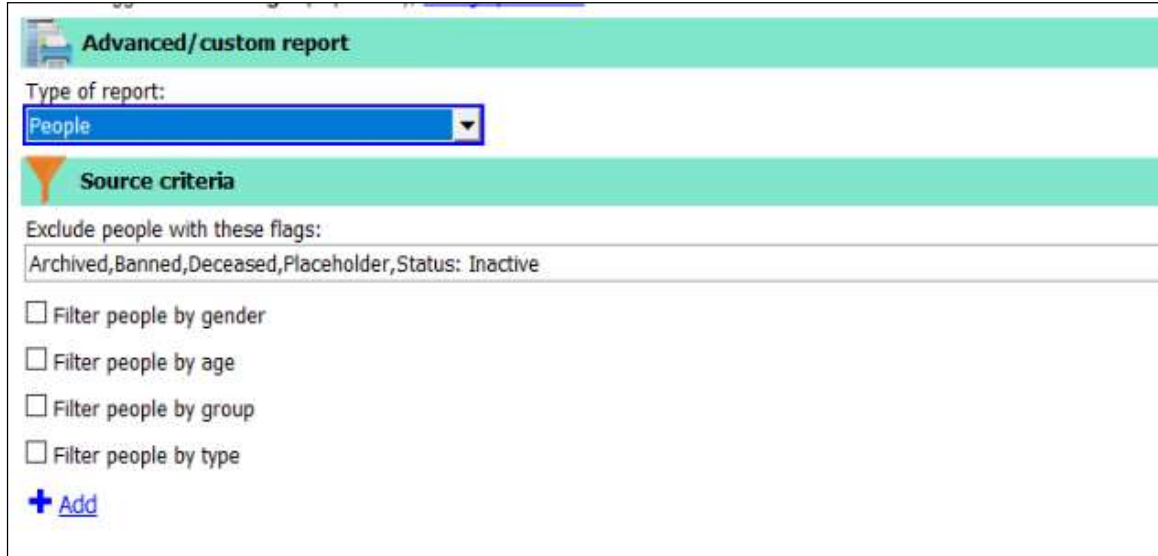
### Reports Panel

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



## 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



**Advanced/custom report**

Type of report:  
People

**Source criteria**

Exclude people with these flags:  
Archived,Banned,Deceased,Placeholder,Status: Inactive

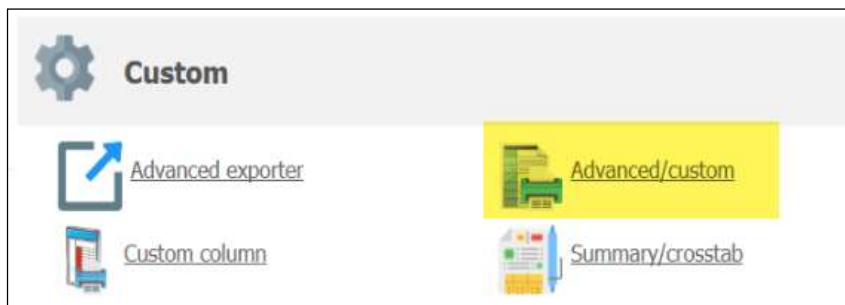
Filter people by gender  
 Filter people by age  
 Filter people by group  
 Filter people by type

[+ Add](#)

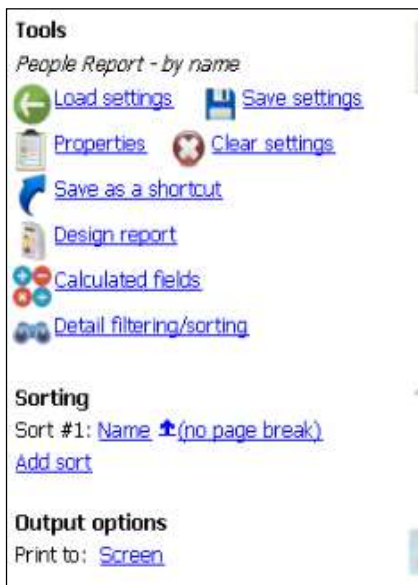
**Settings** – indicates which kind of report it is.

- Type of report: *Where* you're pulling the data from in the profile (not everywhere)
- 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 **+ Add** link. This gives you access to filter on all the different kinds of data fields in the profile. (i.e., Hours history, assignments, DOB, etc.)

*Tip: Not getting the **+ Add** link when you need more filters on a report? Try going to the Custom section on the report screen and open it through the Advanced/custom icon.*



**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
  - Use a header image
  - 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

*Tip: Figured out how you want the report to be configured? **Save** it at top left **As a new report**. This won't change the original, and you can then **Load** it when you want it again. Want to share it – make it a public **Bookmark** for all your team.*

## 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/Advanced reporting** – reports that are easily customizable using drag/drop feature
- **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.
- **Grid contents** - send the contents of what you see on the screen to Excel, RTF (Word), HTML or Tab-delimited text.