Saving Reports in VAOS

## Responsible Entity (RE) Job Aid

Last Updated 11/4/2024

Overview

This job aid explains how to save an existing report in the Vaccine Allocation and Ordering System (VAOS) from a user's PHR report folder. Users may benefit from the procedure by creating a copy of the report in their own private folder, where they can make additional edits and personalization to the report and save for future use.

Step 1: Login to VAOS as an RE

Login to your RE account of VAOS at https://txhhs-covid.my.salesforce.com/ and navigate to **Reports**.
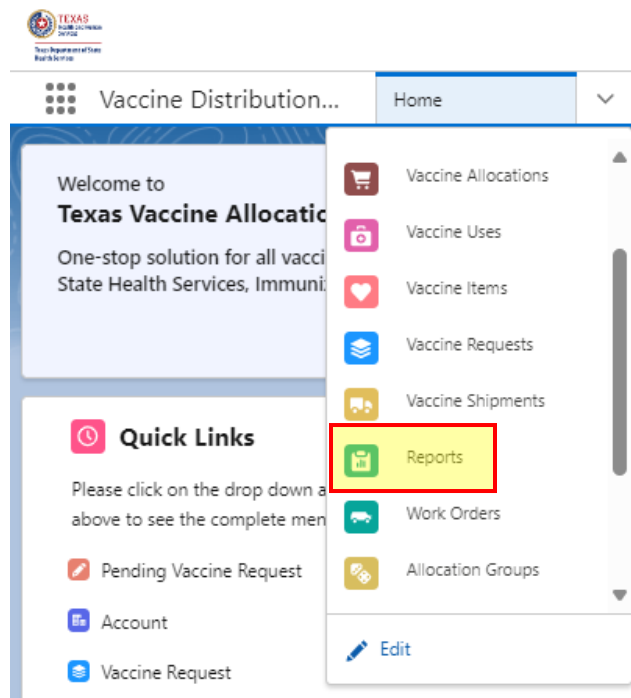
Step 2: Select PHR Report Folder

Select "All Folders" and then select your PHR Report Folder.

Central Office created several different reports for various operations in VAOS in your PHR Report Folder. As an RE user, you are unable to edit these reports in your PHR Report Folder, nor can you create new reports in the folder. However, you can make copies of the reports and save them in a private location of your account. This enables you to edit your own personal copy of the report and further personalize it for what information you are looking for, without changing the original report that Central Office created.

Step 3: Select Report

Navigate to the report you wish to subscribe to. In this example, the *Short-Dated Inventory* report is used. Click on the name of the report to automatically run it.

Step 4: Save a Copy of The Report

Click the arrow located on the far right of the screen, and then click **Save As**.

Step 5: Rename and Choose Save Location

Under ***Report Name**, you may rename the report you are saving if you desire.

Save Report As

* Report Name

Short-Dated Inventory My Copy

RE users do not have the ability to save reports in their PHR folder, so you must select your account's private folder to save the report. On the **Save Report As** pop-up, click **Select Folder**.

On the **Select Folder** pop-up, click **All Folders**.

Click **Private Reports**.

Towards the bottom of the pop-up, click **Select Folder**.

The page will return you to the **Save Report As** pop up. Click Save towards the bottom right.

Save Report As

* Report Name

Short-Dated Inventory My Copy

Report Unique Name ⓘ

Copy_of_ShortDated_Inventory_PHR_7_xjL

Report Description

View TVFC/ASN/FLU provider inventory expiring within the next 90 days.

Folder

Private Reports   Select Folder

Cancel   Save

Step 6: View and Edit Saved Report

Your newly saved copy of the report will automatically open. You may now click Edit on the far right of the screen to make additional edits and personalization to the report for your own business needs in VAOS.

Report: Accounts with Vaccine Items and Vaccine
Short-Dated Inventory My Copy
View TVFC/ASN/FLU provider inventory expiring within the next 90 days.

Enable Field Editing   Add Chart   Edit

Total Records	Total Quantity On Hand
750	7,693

Example of potential edits to your report include adding a sub-region filter, filtering to view one specific provider, or adding additional fields to the report. Remember to click **Save & Run** or **Save** once edits are completed.

You may return to the saved report in VAOS in the future by navigating to the Reports module, and then clicking on **Private Reports**. The report will always be located in this folder unless you delete it. There is not a limit to the number of reports you make copies of and save in this folder.

Additional Resources

VAOS Ordering Inquiries – TXVaccineOrders@DSHS.Texas.Gov

DSHS Immunization Program Website

Immunization Program Homepage for Health Departments

TVFC/ASN Operations Manual for Responsible Entities