

Saving Reports in VAOs

Responsible Entity (RE) Job Aid

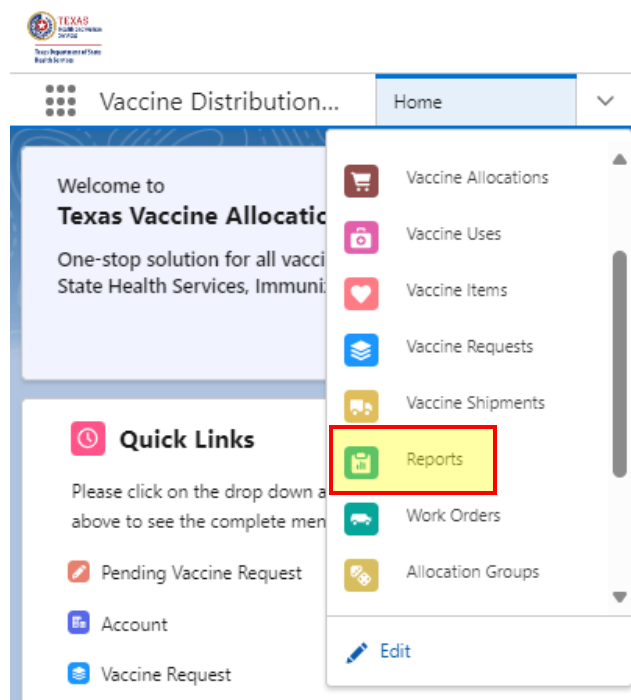
Last Updated 11/4/2024

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.

Reports All Folders 2 items			
REPORTS	Name	Created By	Created On
Recent	Region 7 RE Reports	Ashley Underwood	1/6/2023, 10:45 AM
Created by Me	Regional User Reports	Srinidhi Bapu	4/14/2022, 1:34 PM
Private Reports			
Public Reports			
All Reports			
FOLDERS			
All Folders			

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.

Name	Description	Folder	Created By	Created On
Short-Dated Inventory PHR 7	View TVFC/ASN/FLU provider inventory expiring within the next 90 days.	Region 7 RE Reports	Rae Plaza	1/17/2023, 3:33 PM

Step 4: Save a Copy of The Report

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

Report: Accounts with Vaccine Items and Vaccine

Short-Dated Inventory PHR 7

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

Total Records

750

Total Quantity On Hand

7,695

Enable Field Editing

Q

Add Chart

Save As

Save

Subscribe

Export

Delete

Add to Dashboard

Provider PIN	Account Name	Region	Sub Region	Vaccine Item: Vaccine Item Number	NDC	Vaccine: Vaccine Name	Vaccine Family	Quantity On Hand	Lot ID	Expiration Date (Slashes)	Vaccine alert
1 070001	DSHS Bastrop	REGION 7	DSHS Region 7	VL-0749610	00006-4047-41	Rotateq Oral Applicator 10 Pack; Ped	Rotavirus	8	1989388	11/25/2024	Short Dated
2 070001	DSHS Bastrop	REGION 7	DSHS Region 7	VL-0794959	49281-0545-03	Actrib SDV 5 Pack; Ped	HIB (Pediatric)	5	UJ878AA	11/08/2024	Short Dated
3 070005	DSHS Brenham	REGION 7	DSHS Region 7	VL-0730087	00006-4047-41	Rotateq Oral Applicator 10 Pack; Ped	Rotavirus	9	1979855	11/30/2024	Short Dated

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**.

Save Report As

* Report Name

Copy of Short-Dated Inventory PHR 7

Report Unique Name ⓘ

Report Description

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

Folder

Region 7 RE Reports

Select Folder

Cancel

Save

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

Select Folder

All Folders > Region 7 RE Reports

Click **Private Reports**.

All Folders

Q Search folders...

All Folders

Created by Me

Shared with Me

Private Reports

Public Reports

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

Cancel

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

Q

Add Chart

▼

↺

Edit

Total Records
750

Total Quantity On Hand
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.

The screenshot shows the Texas Department of State Health Services Reports module. The top navigation bar includes the Texas Department of State Health Services logo and the text "Vaccine Distribution...". Below this, a dropdown menu is open, showing the "Reports" section. Under "Reports", the "Private Reports" folder is highlighted in yellow, indicating it is the selected view. The "Private Reports" folder contains 60 items. A list of reports is displayed below the folder name, including "Short-Dated Inventory My Copy", "Inventory", "Meningococcal Inventory", and "Doses Administered". The "Private Reports" folder name is also highlighted in yellow in the left sidebar.

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](#)



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