

VSys One – “Lists & Intellilists” Webinar

Types of lists

Standard List – The bread and butter “shopping” list of VSys. It is a permanent list that exists until you delete it. People are added/removed to/from this list, by you, as needed.

A list can be accessed via **right clicking** on a **person’s name** on the person or advanced search screens, along with other areas where a list of people can be viewed. (You can try right-clicking on a name to see if the menu appears and includes list options.) If the selected person is on the list they can be **removed**, or they can be **added** to any current list. There is also an option to **create a new list**, which will prompt you to name the list.

Lists can also be accessed from the **User tools** section, **List manager/Intellilists** icon. From here you can add/remove people, use communication tools, save, restore and edit the details of a list.

Temporary List – This list functions like Volunteer Works “tagging” did. Any list of this type only exists inside of VSys for the duration of your session and will automatically be deleted when you exit the program. Other users can’t see this list and its best use is if you are collecting people to perform a task in the immediate future and don’t want or need a permanent list added to the database. Beyond those differences the list works under the same rules that as the standard list, people are added or removed by you only.

Intellilist – With Intellilists you can create special lists of people based on specific filters you choose. Where you manually add and remove people from regular lists, Intellilists are simply a saved set of filters. When VSys needs to see who’s on an Intellilist, it looks at all of the people in the database and applies its filters. What is left is your list of people who qualified to be on the list.

Note: You can’t add someone to an Intellilist, they are automatic lists and they are calculated based on the criteria in the list settings.

Every Intellilist requires one or more criteria to designate the rules for deciding whether or not a person belongs in the list. Whenever VSys needs to determine who's in the list, it checks people against these criteria, and those who meet all of them are considered to be on the list.

Add criteria by **right-clicking** on the **Intellilist Criteria** panel, then clicking **Add**. For each criterion, enter a description and an action. The action will be one of the following, and people who meet the criteria here will have this done:

Add these to the list	People who meet all of the criteria here will be added to the interim results.
Remove these from the list	People who meet all of the criteria here will be removed from the interim results.
Keep only those both here and on the list	People who are in the interim results list but who do not meet these criteria are removed from the interim results.

You can test an individual set of criteria by clicking on the **Test** button while editing that set of criteria.

Test the complete list's criteria by clicking on the **Click here to test the list** link.

Accessing lists

You can access a list for use in a person lookup, report or mail merge/mailing label by selecting it from either an option on screen or as an advanced filter. In the **Person lookup** there will be a Lookup method called "**People on lists**", which when selected will prompt you to choose the list you want to use. In many report screens, Hours summary for example, a checkbox entitled **Only people on selected lists** can be selected. If you have the option to **Add another filter** on screen then look under **Others** and select **Lists**. This option will allow you to choose the list you want as well as three additional options **All of**, **Any of** and **None of** which will use the list and apply the selected option to include or exclude people on the list appropriately.

