

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 to/removed from this list by you, as needed.

A list can be accessed by right-clicking on a person’s name where a list of people can be viewed. (You can try right-clicking on a name anywhere to see if the menu appears and includes list options.) They can be added to any current list, or if the selected person is on the list, they can be removed. 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 **List manager/Intellilists** tool in the **User tools** section. From here you can add/remove people, use communication tools, save, restore, organize and edit the details of the list.

Temporary List –A Temporary list only exists in VSys for the duration of your session and will automatically be deleted when you exit the program. Other users can’t see this list. The best use for this type of list is for when you are collecting people to perform a task in the immediate future (ie. send a letter) and don’t want or need a permanent (Standard) list added to the database. Beyond those differences the list works under the same rules as the Standard list and 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 Standard and Temporary lists, Intellilists are simply a saved set of filters. When VSys needs to see who’s on an Intellilist, it looks at all the people in the database and applies the filters. What is left is your list of people who qualified to be on the list.

Note: You cannot 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 as rules for deciding whether or not a person belongs on the list. Whenever VSys needs to determine who’s on 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 the criteria here will be added to the interim results.
Remove these from the list	People who meet all 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 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 for 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.

Finding missing data with Intellists:

Computers are very good at telling you about your data, but not so good at telling you about what's missing in your data. Intellilists can help you find missing data. It's a backwards process. First have VSys find everyone in the database (add to Intellilist). Then remove all the people who have the information you want, and the people that are left on the list are missing the information.