VSys One Filtering Webinar
Fall 2023

Filtering is key to finding subsets of your data to work with, report on or communicate with. While we are specifically looking at the **Advanced People** search screen for the webinar anywhere you see the **+Add** link you can get to these filters.

I want to find….	Use the _____ Filter	Keep in mind…..

Addresses:

People in a certain area (and surrounding areas).	Zip/postal code proximity	

Certifications:

People with a valid certification.	Certification	You can only filter on one certification at a time. Can filter both "all" or "have". *Tip: Check **Only if not expired** to get the valid ones.*
People without a valid certification (missing entirely or expired.	Certification expired or missing	Only on missing or expired.

Example:

If I wanted to find everyone with a valid Flu shot, I would use the **Certification** filter check the **Only if not expired** option.

Dates:

| People who started with your organization in a specific date range.	Date person active	This looks at the person's active date. Depending on your use the **Date person started** or **Date person created** fields might be better. *Tip: Or for when a person started logging hours, see **First volunteer hours**, below,*
When the person's profile was created in VSys.	Date person created	This is the date the record was created in VSys. After a conversion, this will be the transfer date, but going forward will be application creation or data entry date.
Who has a service anniversary.	Date person active/Date person created	*Tip: Check the **Ignore year portion of the date** to use just the month/day part of the date.*

Hours:
The hours filters are your "evidence" filter, telling you who actually showed up and their history.

Which volunteers showed up and for what.	Completed assignments/hours records	Use a count of 1 or more hours to get people who have hours recorded for that timeperiod.
Who hasn't come in in the last 30/60/90 days.	Last volunteer hours	*Tip: Remember with this one to watch your Status exclusion filters. You may or may not want to exclude people who are on Leave of absence.*
People who forgot to check out and were automatically signed out of the kiosk.	Automatically checked out hours records	Use your **Count** filters to get your repeat offenders.

Example:

Let's say we had a Measles exposure risk. If we look for everyone who had more than 1 hour, on the 5th, between 8am and noon, in specific jobs/service areas we can find all the people who might have been exposed.
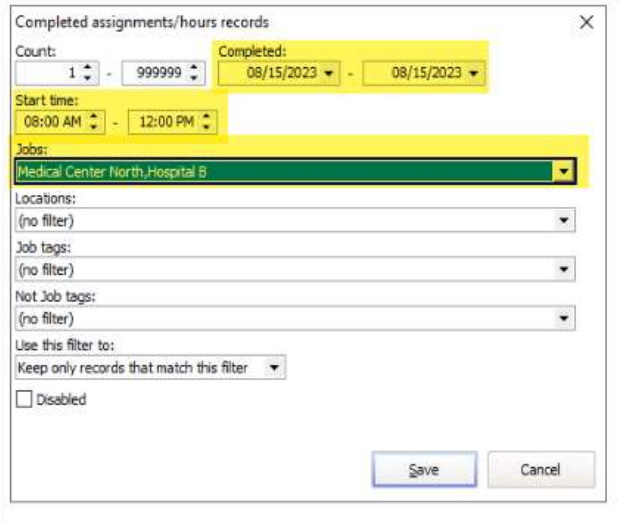
This is also a useful filter if you're trying to find everyone who actually worked a special event.

Assignments:

Remember, assignments are "predictive" – who is "supposed" to be here. The Hours filters tell you who **was** here.

People who have a certain assignment.	Assignment	Recurring assignments sub-filter lets you pick the big assignment or the details. Use the **Status** filter to get the unusual detail records
People who have a certain association.	Job association	
People who are "connected" to a job.	Assignment and/or job association	*Tip: This tends to be my favorite unless you use Assignments or Associations exclusively or want just one of those sub-groups. This pulls the combination to get everyone connected to a job.*

Example:

I want to know who has cancelled or called out for the next two months. By picking my jobs and combining that with a date range and status I can see all the volunteers who have cancelled.

Other:

People who submitted a specific application from in certain time.	Application form	
People who were sent a specific letter/People who were not sent a specific letter.	Letter sent	*Tip: Use the top drop-down to either resend a letter or to send it to the folks who didn't receive it yet.*
People who have signed up for or who have taken a certain training.	Training	
People on a list.	Lists	Lists can be useful when people don't have something else in common. By putting them on a standard or temporary list you can use that as the filter.

Personal properties:

People who have a birthday next month.	Date of birth	Remember to check the **Ignore year portion of date.** You probably don't have any people who haven't been born yet if you used the default dates.
Our VSys users in the office.	Security user	This filter pulls people who have VSys administrator accounts.
People with _____ .	Custom field	If you are using custom fields to track something that doesn't have another place in VSys, you probably need to report on it. The options here will vary depending on whether it is a yes/no, checklist, text, number or date field.

Status:

Who was active on December 31st 20XX.	Status on a specific date	This filter allows you to pick a specific date. Note it is dependent on tracing being enabled in your system.
How many people I have who are active	Active status = Active	This will get you a count of everyone with the status of active in their profile, but make sure this meets your definition of "Active" for reporting. You might need to include more statuses or add a filter for completed hours.

Transitions:

| Send a letter only to the people whose assignment/training/interview has changed since the last communication.	Trainings/Interview/ Assignment since last letter	This filter looks for changes in the commitment since the last letter was sent.

(active to inactive etc.)	Transitions[1]	Looks at the changes in a person's profile over a period of time.

Stacked Filters:

Who was **some active status** during a specific time….	Status at any point during date range + Date created	Use the active status in a date range but also the date created filter with no start date but an end date of the end of the period you're looking for. This one is always tricky because you need multiple filters to get the information accurately.
People who aren't listed with an approved application, but who are volunteering.	Application + Last hours	Look for applications with a status other than "approved" and hours.

Filtering for "missing" information:

It's easy for the computer to look for existing information, but harder to find "empty" pieces. There are a few "missing" filters – Certifications, Email, Web/kiosk passwords. But if you're trying to find other missing information it can be done with an Intellilist.
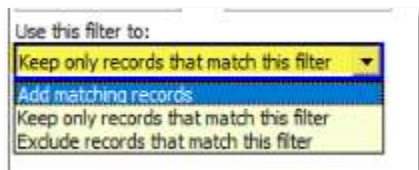
We talked about the filters we looked at as being "and" filter (Keep only records that match this filter). But there are more complicated options. We can use one filter to find everyone in the system, then subtract (Exclude) everyone who meets another filter to make a list of the remaining people as people who are missing that information. Or create results that add two filters together instead of making the results match all the filters.

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[1] Transitions requires a little more explanation. The transitions section lists a lot of changes tracked about a person and this allows you to filter on them. They are very detailed and specific, but for most cases there a broader filter in the list that will get you that information easier. If the filter you find is not detailed enough then consider looking in Transitions.