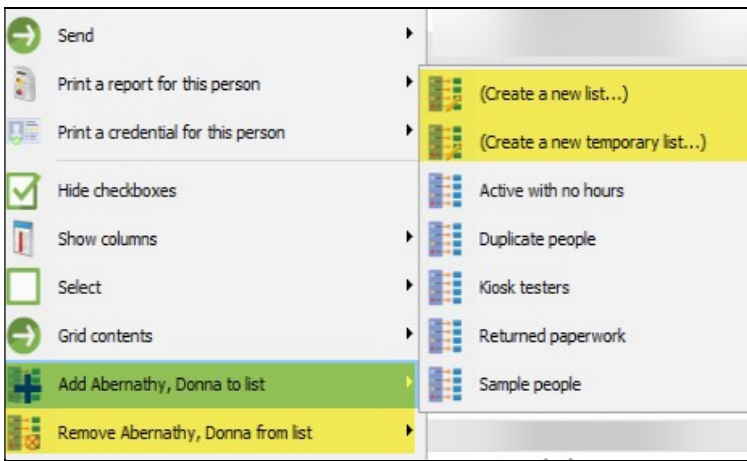# VSys One – "Lists & Intellilists" Webinar
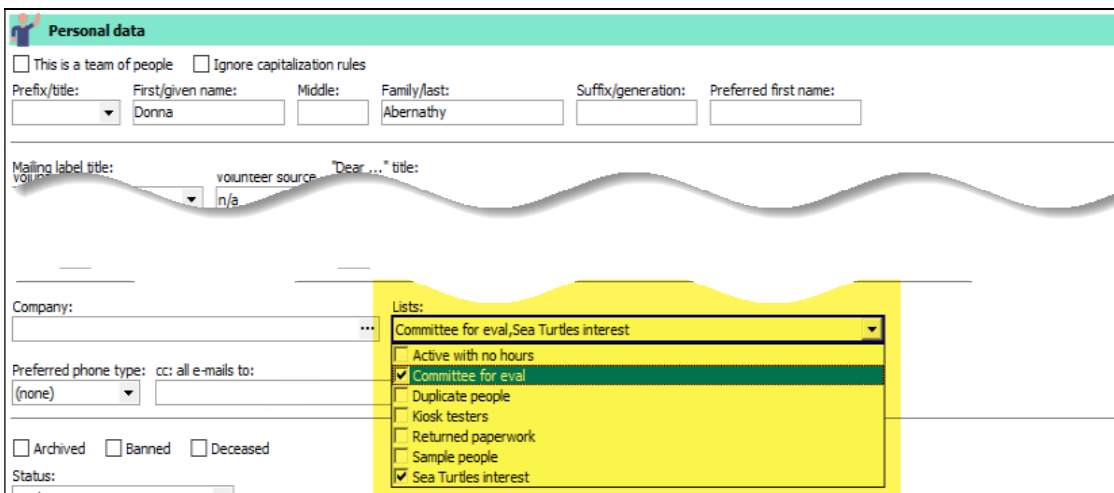
Types of lists

Standard List – The *Standard list* is a permanent list that exists until you delete it. People are added to/removed from this list by you, as needed.
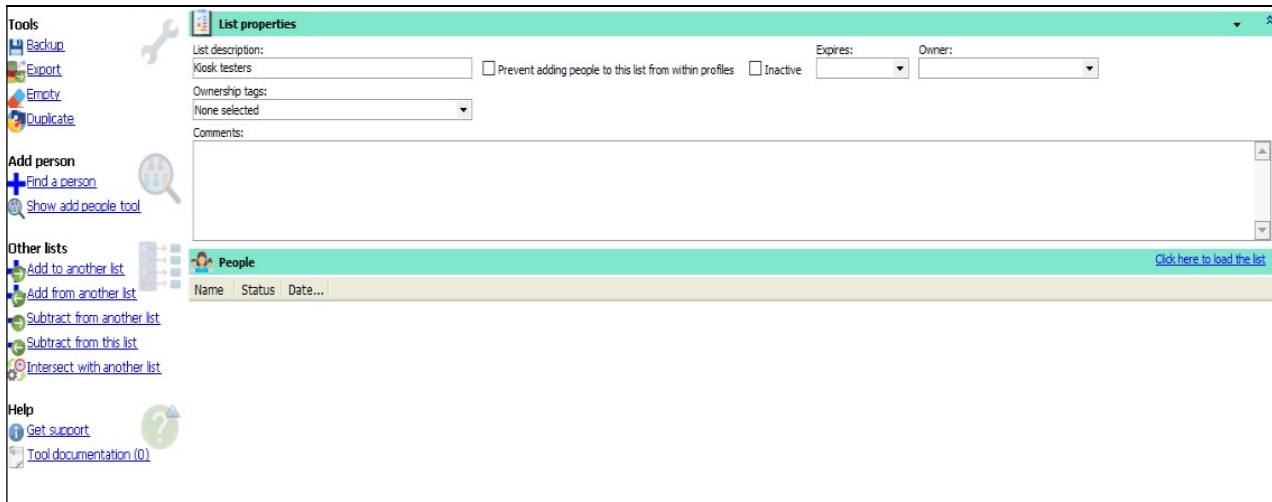
How to:

- **right-clicking on a person's name** where a list o.f people can be viewed allows you to add/remove or create new lists

- **inside a person's profile** at the bottom of their Personal data

- **List manager/Intellilists** tool. 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. Otherwise the list works under the same rules as the *Standard list*.

Intellilist – With *Intellilists* you can create special lists of people based on specific filters you choose. 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.

How to:

From the **Lists Manager/Intellilists tool.** 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.

Using Lists

Person lookup, report or mail merge/mailing label by selecting it from either an option on screen or as an advanced filter. If you have the option to +<u>Add</u> 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.

Person lookup, there will be a lookup method called <u>People on lists</u>, which when selected will prompt you for the list you want to use.

<u>Sample use cases:</u>

<u>Shared Decision-Making committee:</u> *Standard list*

You have a team of people who have nothing in common. By putting them on a list, you now have an identifier for filtering.

<u>Tracking volunteers who have returned something for compliance:</u> *Standard list*

Over a three-week period, you are collecting a compliance document. As people turn in the document, add them to the list. Then use that list as a filter to bulk add the certification or training. The list can be cleared if you want to do this incrementally.

<u>Updating volunteer data:</u> *Temporary list*

You have a team of volunteers who are going to take on a project. They are all a sub-set of a specific job association. Search the job association. Put those people on a temporary list and use that to bulk create their new job association. The list disappears when you exit, that job association becomes what they have in common for filtering.

<u>Eligibility/visibility – *Intellilist*</u>

If you are using VSys Live, Intellilists may be driving some of your visibility rules. When you need more detailed filtering than Group/People type Intellilists allow you to create complicated filter rules.