

Getting Started with ACS People

Before starting to enter information into People, here are some things that are helpful for you to know.

Before you start entering information, it's important to:

- Define terms frequently used
- Share concepts behind the People module
- Create a checklist of steps to follow in setting up People.

Security in the People module

Security in ACS is based, not just on whether or not you have access to a module, but what options you can access within the module, and what you can do in that option.

Within a module option, security choices are:

- **All** — Allows the user to do anything within the option.
- **View** — Allows the user to only view information found in the option. Occasionally View is not available as a Security choice.
- **None** — The user is not given access to the option. An option usually looks gray compared to other options when a user doesn't have access to it.

You can [set up security rights](#) in **Utilities > Add/Edit Users**. A grayed option means you do not have access to it, and if you need access, you'll need to go to your church's administrator to ask for it.

For Example



The Add/Edit Individuals option is in the People module. Add/Edit Individuals stores names, addresses, phone numbers, and a lot of other information about individuals who have a relationship with your organization.

Your volunteers help out at the office front desk by answering the phone. Members are always asking for addresses and phone numbers, and you want the volunteers to be able to get that information but not be able to change anything.

In ACS People, they are given access to the View/Edit option with View only rights. This allows them to access Add/Edit Individuals but they cannot change or edit any information.

Terminology used in the People module

Understanding terminology used in People will help you correctly set up and use this module. Take some time to familiarize yourself with the following:

- **Active record** — A record that is not deactivated. Active records are automatically included in searches or reports.
- **Activities** — An area in People that allows you track the things individuals participate in (examples: committees, choirs) and their special gifts, skills, or experiences. The Activities area is customized by you using terms and language you are used to.

- **Address Type** — ACS lets you store multiple addresses for an individual. You need to designate the address or addresses to use for the primary address, mailing address and contribution statement mailing address.
- **Deactivated (inactive) record** — A record that is no longer active. Deactivated records are not automatically included in searches, filters, and reports.
- **Mail Merge** — A feature used to create and print Microsoft Word form letters based on search results. Names along with information you specify exports to Word and personalized letters are created during the merge process.
- **Member Status** — This is User Defined List which you can edit using the [Define Lists](#) option in the People module. It contains five default elements. The status is used to describe an individual's relationship to your organization.
- **Search** — Similar to doing a query. A search allows you to find names in the database based on criteria you create.

People's Relationship to Other Modules

The People module is the foundation for all other modules in the People Suite so it is important to make sure it correct.

- Names, addresses, and other personal information added in People is viewable in many other modules.
- Searches can be done on information found in more than one module.
- Output into reports, graphs, exports, and mail merge can come from more than one module.

Access ACS

Access ACS is a web based companion to ACS. Data flows back and forth between People and other modules and Access. If you are going to use Access, include its functionality in mind (groups, online giving, outreach, serving, event registration) during set up.

Use the following documents to help you determine the features you'll use in Access and how to set them up to interact with ACS.

- [Access ACS Administrator's Guide](#)
- [Getting Started with Access ACS](#)