

Working with Additional Fields, Dates, and Lists in People Define Lists

Additional Fields, Dates, and Lists allow you to track information unique to your organization that may not be set up in ACS People Suite. You can customize these to meet your church or organization's needs.

Before entering additional field, date, and list information in the People module, it's important to ask yourself a few questions about the information you want to track. Once you've answered these questions, you can activate additional fields, dates, and lists.

?▶ Who does the information apply to? Is the data specific to an organization, individual, or family?

You can set up additional fields for organizations, individuals, or families, but it's important to set up the information in the correct category.

For example, if you want to track which deacon or elder is assigned to a family, you can set up a list in the Families category, because every member of that family is assigned to that particular deacon or elder. However, if you want to set up an additional field to track the date an individual was baptized or confirmed, you'd set up a date in the Individuals category, since family members will likely have different baptism or confirmation dates.

?▶ Should I use a list, field, or date to track the information?

Depending on the type of data you want to track, choose an additional field under **Lists**, **Fields**, or **Dates**. Not sure which one to use? Here are some examples to get you started:

- **Lists** — Lists store information when there is a limited number of possible entries, such as blood type or school level. These entries are called list items or elements, and you'll select the entry within a drop-down list in the software. For example, if you're tracking a child's school level, you could set up a list called School Level, and add pre-school, grade school, middle school, high school, and college as list items. In addition, if you're working in the software and find that you need an additional list item, you can define the available selections in drop-down lists throughout the software.
- **Fields** — Fields store information when there is an unlimited number of possible entries, such as former church, or health problems. Within ACS, you'll type the information you want to track into a field.
- **Dates** — Dates store the date of a particular event such as an anniversary or graduation. In ACS, you can enter a date or select it on a calendar.

?▶ I'm still puzzled. Can you give me some examples?

Suppose your church hosts quarterly blood drives, so you want to track members' donor statuses, their blood types, and the date they last gave blood.

Since blood type and donor status vary by individual, you'll want to track your information under **Individual**. Then, decide if you need to track this information using a date, field, or list. Since there are a limited number of blood types (8), you could set up a List to track blood type, then enter each of the 8 blood types. You could also use a List to track blood donor statuses and enter several selections, such as **Emergency Only**,

Unable to Give, and **Yes**. Since the date someone last donated blood also varies from person to person, you'd also track this under **Individual**, but you'd use a **Date** to track the information.

Or, suppose you want to track a the place of employment for individuals associated with your church or organization. Since individuals could work at one of many businesses or companies, you could set up a field under **Individual** to track this information. Then in View/Edit Individual, you'd enter the individual's workplace in that field.

To create an additional field or date

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Under **Fields**, expand **Organization**, **Individual**, or **Family**, depending on who you want to track information for.
4. Expand **Dates**, **Fields**, or **Lists**, depending on the type of user-defined information you want to track.
5. Select a **Not Defined** date, field, or list, then click **Activate Field**.
6. In the **Field Description** field, enter the name you want to display for the field and click **OK**.

 Using punctuation marks (for example commas, apostrophes, colons, or dashes) in the names of additional fields can cause you to receive error messages when filtering, searching, and printing reports.

To create an additional list

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **People**, then click **Go** .
3. Under **Fields**, expand **Organization**, **Individual**, or **Family**, depending on who you want to track information for.
4. Expand **Dates**, **Fields**, or **Lists**, depending on the type of user-defined information you want to track.
5. Select a **Not Defined** date, field, or list, then click **Activate Field**.
6. In the **Field Description** field, enter the name you want to display for the field and click **OK**.

 Using punctuation marks (for example commas, apostrophes, colons, or dashes) in the names of additional fields can cause you to receive error messages when filtering, searching, and printing reports.

7. To add selection items for your list, click **Add**.
8. In the **Field Description** field, enter a selection option, then click **OK**. Or, to additional selection options, select **Add Another**, then click **OK**.
9. Repeat step 8 to add each selection option for your list. When finished, click **Cancel** to exit Define Lists.