Certification Prep Guide

People

*In preparation for the exam, you should be comfortable with the following tasks. These tasks are **not required** for the exam, but simply reflect the knowledge and skills you need to pass the exam. You might consider creating a practice People dataset to use in preparation. (For more information on Multiple People Datasets, please see this Knowledge Base Article.)*

Part 1 – Managing People Profiles

1. Enter families into the database. Complete all personal information for each individual, including date of birth, marital and member statuses, gender, and date and how joined (if appropriate for member status.)
2. Add winter addresses.
3. Add college address.
4. Add work or cell phone numbers.
5. Add e-mail addresses.
6. Modify individual or family label names.
7. Export the Find Person screen and save it to your computer.
8. Use the *Change Family Unit* feature to combine two Singles records to a married family unit.
9. Use the *Change Family Unit* feature to split a married family unit with children into two families. Leave the children in the family unit of the Mother. Use the Other Relationships portion of the Family tab to show the relationship to the Father's family unit.
10. Deactivate an individual due to death. Update the member status, reason and date deactivated, and family position of surviving spouse (if applicable).

Part Two – Searches and Filters

1. Create a filter that will display only those who are 25 years or older on the Find Person screen. Save the filter as a public filter.
2. Create a filter that will display only youth between the ages of 12 and 17 on the Find Person screen.
3. Load the Master Listing of People report. Load the filter you created in step 2 and apply it to the report. Save the Report as a public report.
4. Create a search to find all the people who have leadership positions in Sunday School. Save the search *results* as public.
5. Create a search to find the children whose moms are in the database as Head of Household.
6. Create a search using the results in step 5 to find those children under the age of 6. Save the search *criteria* as public.
7. Create a search to find everyone in the database who has an email address. Edit the search to remove one record. Save the results as public.

8. Create a search to find everyone in the database with a June birthday. Customize the results grid to include the primary phone number. (Note: This phone number is located under the Address category rather than the Phones category.) Save both the *criteria* and *results* as public.
9. Load the Listing of Names in Date of Birth Order report. Remove the filter that is included by default. Make sure the report is using the last search results. Save the report as a public report.
10. Use the Edit Search Results to create a list of 10 individuals with whom you communicate regularly. Save the *results* as private.

Part 3 – Working with Reports

1. Run the People Census report, then answer the questions.
    - What is the average household size in your database?
    - What is the average age of all individuals in your database?
    - Which age group would the data indicates you are best at reaching?
2. Run the People Statistics report, then answer the questions.
    - What city has more of your members than any other?
    - What percentage of your members live there?
    - How could you limit these results to show you statics for families?
3. Run the People Statistics graph, then answer the questions.
    - What is your percentage of Females?
    - What is your percentage of Males?
    - What is your percentage of Blanks?
4. Save the graph as an image.
5. Run the graph again, using Marital Status instead of Gender, then answer the questions.
    - What percentage of your database are single?
    - What percentage of your database are child/yth?
    - How would your data analysis be affected if all your child/yth had marital statuses of single?
    - If you were considering the launch of a singles ministry, how could you find out the age breakdowns of these singles?
6. Run the Master Listing of People w/ 2 Special Fields report. Choose any two special fields to display. Save the report as a Public report.
7. Run the PDA Export using the Search Results from step 10 in the previous section. Import the names, addresses, phone numbers, and e-mail addresses into Microsoft Outlook.
8. Run the Standard People Export report.
9. Run the Customized People Export. Include pledge and actual gift data. (If you don't use Contributions, include other data that is not in the Standard People Export.)

Merging with Microsoft® Word

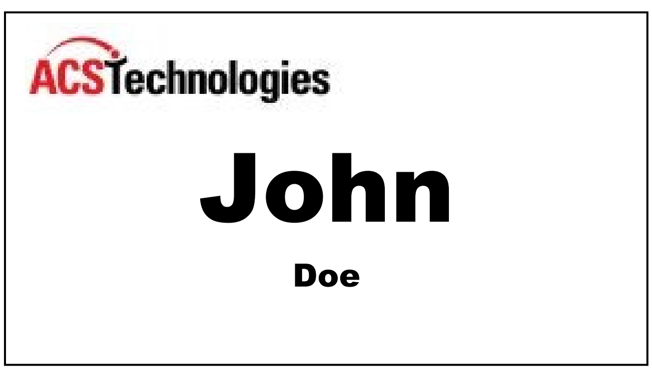
1. Create a personalized letter to the Sunday School leadership. Merge with the saved search results for people who have leadership positions in Sunday School. Include multiple merge fields. Save the Word Document (Main Document, not the merged file) on your computer.
2. Load the document created in the previous step into the Mail Merge Available Document list in ACS.
3. Create another mail merge letter inviting 5 individuals from your database to be part of a strategic planning team. (Use the Edit Search Results to select the individuals for the merge). Complete the merge, and save the merged document to your hard drive.
4. Create another mail merge letter to all active contributors. Be sure to include their pledge to date and gifts to date information in the letter. Save the main document (not the merged file) to your hard drive.

Working with Labels

1. Create and save (public) a label format for the children's ministry. The labels should look as follows:

    To the parent(s) of:
    Jimmy Doe
    123 Any St
    Florence, SC 29501

2. Create and save (public) a name badge label. The badge should include a logo or graphic, and look similar to the following:



3. Create and save (public) a label format to allow barcode attendance scanning. The label should include the individual's informal label name and barcode.
4. Create and save (public) a newsletter label format that includes only two member statuses. Include in the setup the configuration for bulk mailing the newsletter. (At least five zip codes should be included.)

Content List

Below is the list of content areas that may be covered in the People exam.

01.00 Getting Started
- 01.01 Big Picture Overview
- 01.02 Terminology and Definitions
- 01.03 The User Interface
- 01.04 Find Person Options
- 01.05 Decisions and Directions
- 01.06 Configuration, General
- 01.07 Configuration, Define Lists
- 01.08 Configuration, User Accounts

02.00 Managing People Profiles
- 02.01 Working from the Add/Edit Individual Screen
- 02.02 Entering a new individual (new family)
- 02.03 Entering a new individual (existing family)
- 02.04 Tracking other relationships
- 02.05 Adding additional addresses
- 02.06 Adding Additional Phone Numbers and E-mail Addresses
- 02.07 Adding additional fields
- 02.08 Modifying label names
- 02.09 Exporting the Find Person grid
- 02.10 Combining family units
- 02.11 Splitting family units
- 02.12 Changing family position
- 02.13 Deactivating individuals

03.00 Searches and Filters
- 03.01 Understanding Searches and Filters
- 03.02 Creating a new filter
- 03.03 Editing filter results
- 03.04 Saving a filter
- 03.05 Loading saved filters
- 03.06 Creating a new search
- 03.07 Understanding Search Criteria and Output Flags
- 03.08 Editing search results
- 03.09 Saving a search
- 03.10 Loading saved searches
- 03.11 Searching on previous search results
- 03.12 Printing search results
- 03.13 Using Searches and Filters with the Find Person screen
- 03.14 Using Searches and Filters with Reports
- 03.15 Using Searches and Filters with Mass Change

04.00 Working with Reports
- 04.01 Understanding ACS report types
- 04.02 Accessing reports
- 04.03 Key People Reports
- 04.04 Understanding report options