Innovating the Standard in Church Demographics

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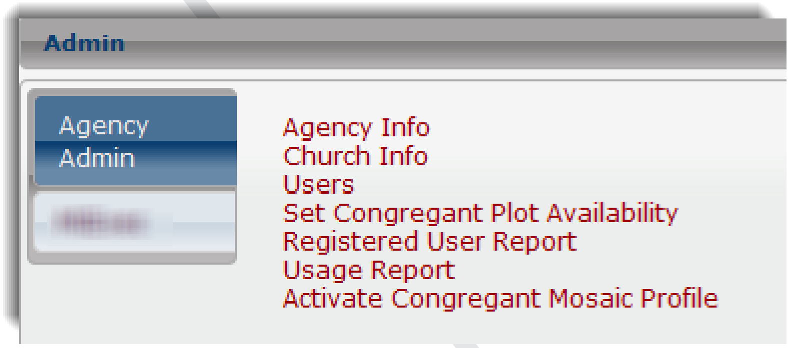
Regional Agency Administrator User Guide

February 2011

The Agency Administrator position in the MissionInsite System provides each MissionInsite client the ability to self manage a variety of services provided to the client. These services are managed in the Agency Admin section of the client password protected study area.

Agency Admin Tab

The initial Regional Agency Administrator is set up by the MissionInsite Representative which provides the client access to the Agency Admin Section. The Agency Admin Section currently has seven administrative areas. Additional areas may be added.



Agency Info

Administrator is asked to complete and keep current the agency information including web site and agency contact email address.

Church Info

This area includes address and contact information that was provided to MissionInsite to locate churches on the study map.

Agency Administrators have the ability to edit church records. This includes adding missing information and changing addresses. When an address is changed and saved, it will change the location of the church on the map. Please check the church location on the map to make sure the edit has been completed and the church has been moved to the new location. Administrators also have the ability to manually move a church to the correct location on the map. Navagate to the current church location. Right click mouse and then left click on Identify Church. A blue marker will appear next to the church. Mouse over the marker to view the information in the church record for that church. At the bottom of the window there is an option to Manually Move Church. Left click on Manually Move Church and follow directions to move the church to it's correct location. Often, the Satellite Hybrid map view is helpful in selecting the correct location.

To add or delete church locations they need to be sent to your MissionInsite representative or Client Relations Manager.

Western US Office
7700 Irvine Center Drive, Ste. 800
Irvine, CA 92618

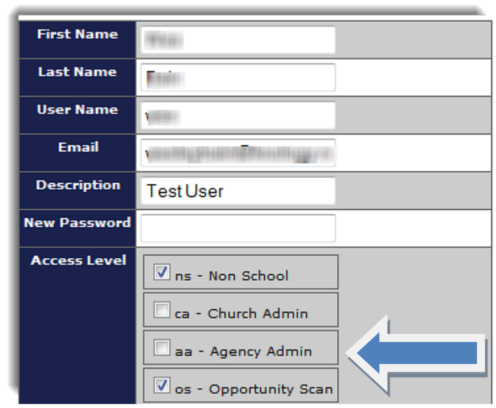
Eastern US Office
1639 Bradley Park Drive, Suite 500
Columbus, GA 31904

Users

Here the Agency Administrator can add, edit and delete agency users. Each box must be completed to register a user. Each email address must be unique to the user and cannot be used for multiple users.

Do Not Check the aa – Agency Admin box for a new user unless you want them to be an Agency Administrator and have administrative rights to add, edit and delete users.

Also remember each user checked as an Agency Administrator will receive an email notification following each new local church user registration.



To add an additional Agency Administrator you must check the aa - Agency Admin box before saving the record. The ca – Church Admin box is checked when you assign the Church Administrator rights to a registered local church user to use congregant plot for their church. See <u>Activate Congregant Plot for Churches</u> below.

Note: All local church users self register on the Church Registration page using the Agency Account Number. When a local church user registers an email will be sent to the Agency Administrator/s

Set Congregant Plot Availability

In this area you grant a local church access to the Congregant Plot function by placing a check in the box under Set Congregant Plot and click save. See the <u>Activate Congregant Plot for Churches</u> section later in this document for complete instruction for a successful activation.

Registered User Report

This area provides the Agency Administrator/s a view of the activity of all of the registered users for the study. The report for each user includes the date they registered, the number of times they have logged into the study and the date of their most recent login.

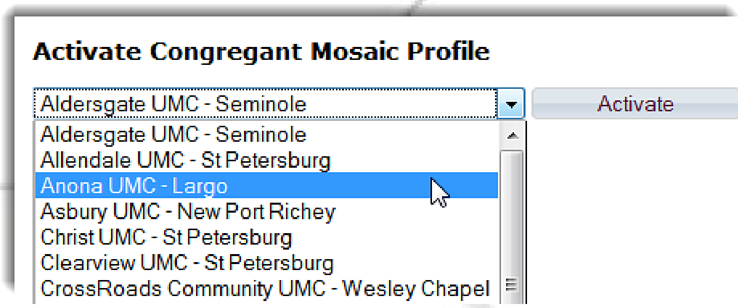
Administrative Users may also create a printable .PDF file of the Registered User Report on this page.

Usage Report

This area provides the Agency Administrator/s a view of the number of reports downloaded each month, the total number of reports downloaded, the total number of registered users and the total number of user logins.

Activate Congregant Mosaic Profile

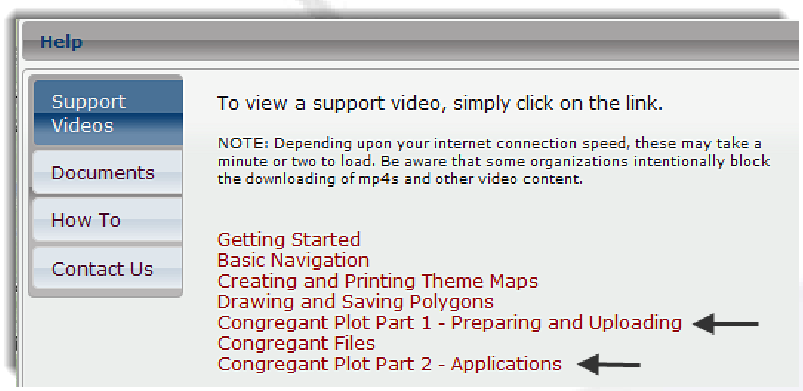
This area provides the Agency Administrator/s the ability to manually activate the congregant Mosaic profile for any congregation. This function is designed to be activated automatically when the congregant file is uploaded. If for some reason this profile is not displaying select the church name from the drop down list and click the Activate button.



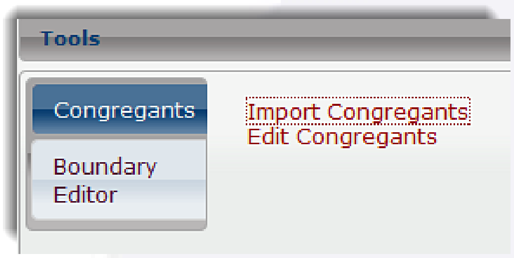
Using Congregant Plot With Churches

There are several resources available to assist the Administrative User in understanding the use of Congregant Plot with churches. These resources are all located inside the client password protected area. Once logged in, mouse over the "Help" tab and select Support Videos.

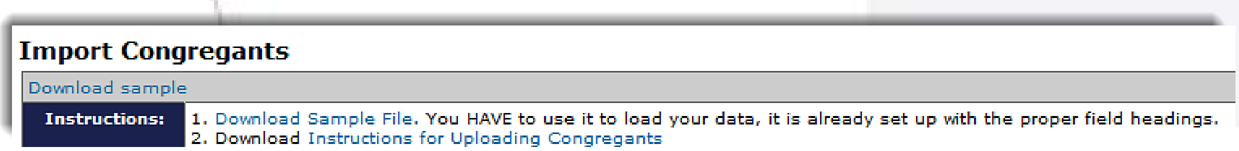
1. View Congregant Plot Part 1 – Preparing and Uploading Congregant Files and Congregant Plot Part 2 – Applications.



2. After viewing the support videos, mouse over the "Tools" tab and select Congregants. A new "Tools" window will open. In the Tools window select "Import Congregants".



3. A new "Import Congregants" page will open. Click on the "Download Sample File" link to download, save and view the Excel data template. This Excel template MUST be used to capture the basic congregant data in the format necessary for uploading congregants.



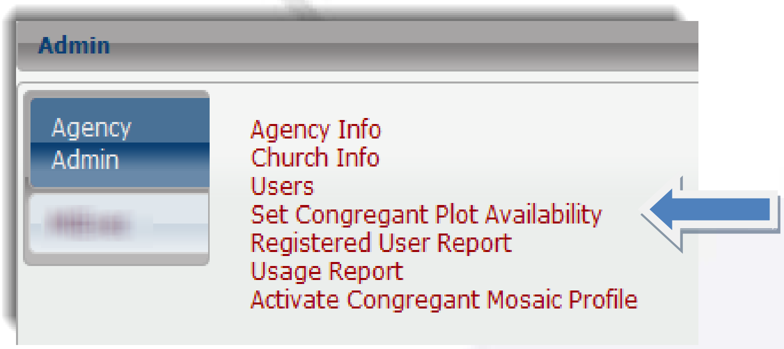
4. Click on the “Instructions for Uploading Congregants” link. This Excel file provides detailed instructions on both format and optional fields that may be included in the congregant data file. These formatting requirements MUST be followed exactly of the file upload process will not be completed successfully.

   If you have any issues with this procedure please contact us. We are more than willing to assist you and your local churches with your first church uploads to help you become familiar with this function. MissionInsite provides an ongoing congregant plot upload service for any church for an added charge of $75 per upload.

Regional Agency Administrator Functions to activate Congregant Plot

1. As the Regional Agency Administrator, you must activate the congregant plot availability for each church in your region that wishes to use this tool. In order to activate congregant plot for a local church, select “Agency Admin” from your toolbar.

Then select <u>Set Congregant Plot Availability</u> from the available menu choices. When your church list appears, check the appropriate box next to the name of the church you are activating. Then scroll to the bottom of the page and save. Once this is completed, the Congregant Plot function will be added as a feature on the local church users screen.

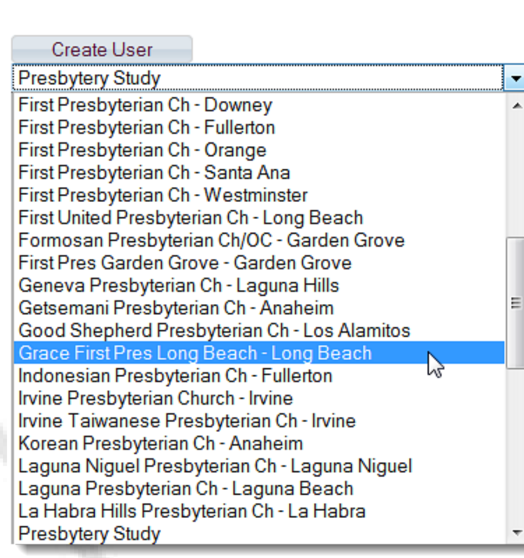



Number of Congregant Plots: 59
Used: 57
Available: 2

Church Name	Has Congregant Plot
Agape PC - Placentia CA	☑
Canaan PC - Santa Ana CA	☑
Canyon Hills PC - Anaheim CA	☑
Chinese PC/OC - Westminster CA	☑
Christ PC - Lakewood CA	☑
Christ PC - Huntington Beach CA	☑
Community PC - Long Beach CA	☑

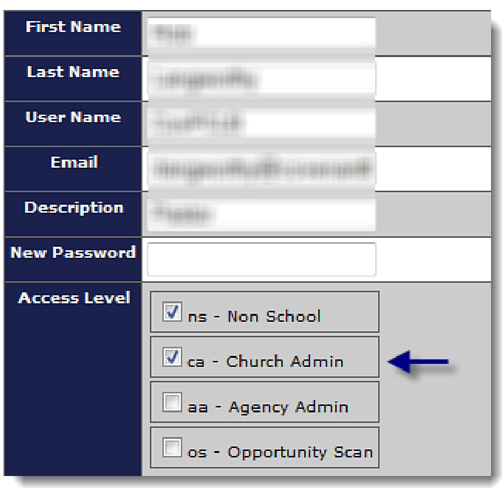
2. The Church Administrative User for the local church must also be designated by the Regional Agency Administrator. The Church Administrative User is the ONLY user that may upload congregant data, create, print, save corresponding congregant plot lists and create mailing lists for selected geographies. Any user may view congregants that are plotted, but the above congregant plot administrative functions are limited to one local church individual to maintain the confidentially of church congregant lists.

3. The Regional Agency Administrator creates a Local Church Administrative User in the "Agency Admin" section of the toolbar. Once "Agency Admin" is selected, select "Users." (See illustrations in step 1 above)



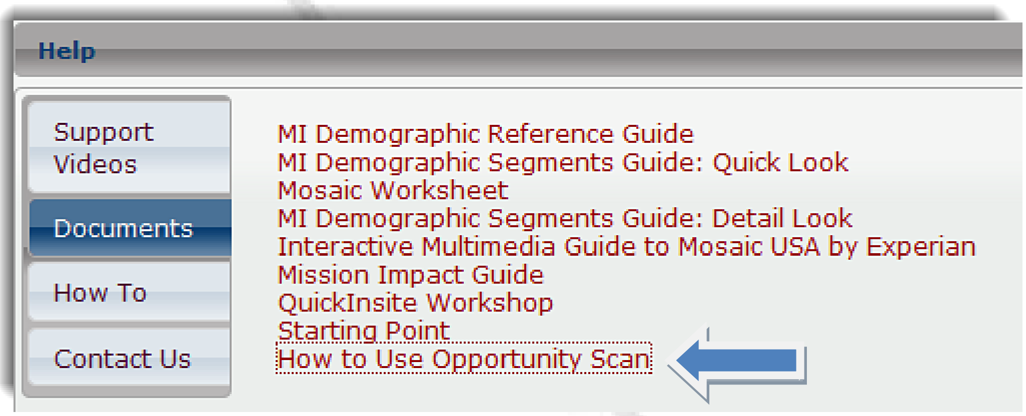
4. Choose the appropriate church from the dropdown list and the registered user to be designated Church Administrator.

5. Then check the box for "ca - Church Admin" (Illustrated in the graphic below) and save. This provides the church user with administrative rights to upload their congregant list in the exact format as outlined and illustrated in the above documents and other administrative rights above.



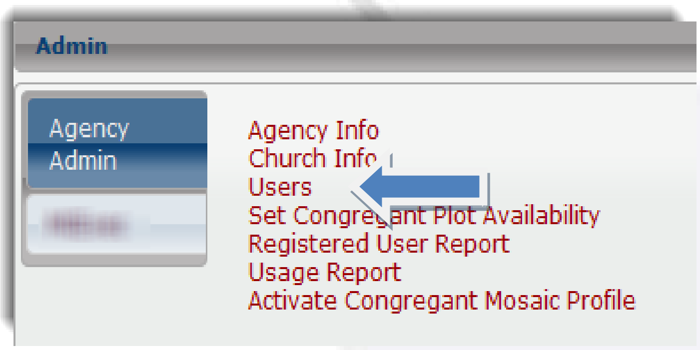
Activating Opportunity Scan for Regional and Local Church Users

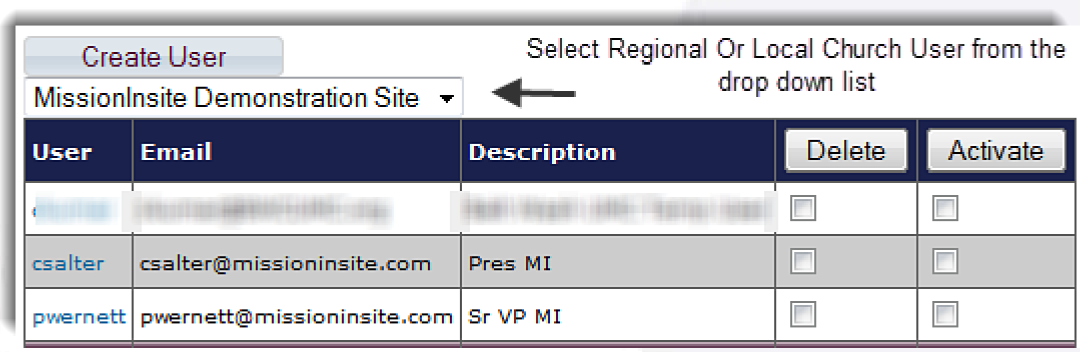
1. **As the Regional Administrator you must activate the Opportunity Scan function for regional or local church users.** Opportunity Scan is designed specifically to assist denominational planners scan large or small geographic areas looking for a specific demographic variable. For more information on the use of Opportunity Scan please refer to "How to Use Opportunity Scan." This resource document is located inside the client password protected area. Once logged in, mouse over the "Help" tab and select Documents.



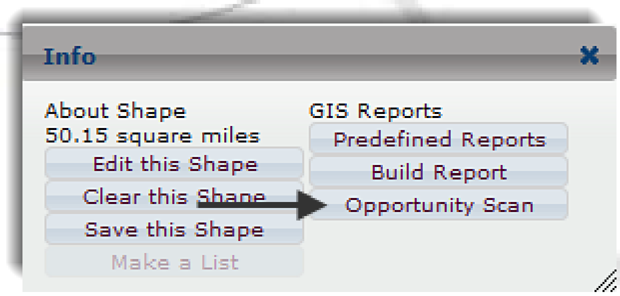
2. To activate Opportunity Scan for a user, select "Agency Admin" from the toolbar. A new "Admin" window will open.

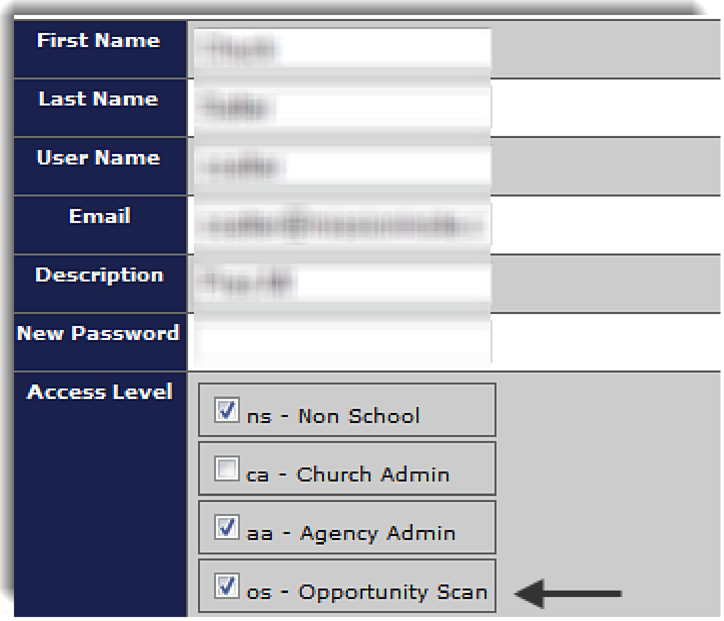
3. From the Admin window, select "Users." Click on the User name of the person you wish to activate. Regional users will appear as the default list for your agency. To activate a local church user, select their church name from the drop down menu. (See illustration below) then select the user from the list.





4. After selecting any User name, a new window will open allowing you to activate the Opportunity Scan feature. Check the box next to Opportunity Scan then scroll down to click Save. Once this is completed, the Opportunity Scan function will be added as a feature inside the Info box on the users map screen.





For support documents and video resources please consult the “Help” tab on the upper left of the map screen. For additional assistance contact Michelle Saxon, MissionInsite Client Relations Manager.

Michelle Saxon
Client Relations Manager
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877-230-3212 ext. 327