Organizational Identity

Who Are We?

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Community Engagement Specialists
For Faith & Nonprofit Groups

Organizational Identity and Core View

Who Are We?

To begin your ministry journey with MissionInsite let's learn what additional knowledge can be provided about the persons associated with your organization (Congregants).

How do they distribute geographically? What households are you reaching? What are their demographic, socio economic, behavioral and religious characteristics ?

CATEGORY EXAMPLES

Regular Attendees (Core Assets)
Visitors /Persons of Interest
Affiliates with casual involvements
Supporters who are unable to attend

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Organizational Identity and CoreView

The First Essential View – Who are We?

This Tutorial Will Cover:

Uploading/Importing Congregants
Retrieving Congregant Address Lists
Displaying Congregants by Attributes
Displaying Congregants for Multiple Churches

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To begin, your congregation must have your Regional Agency Administrator designate at least one of your registered users as a Church Administrator. This designation provides security for your congregant file.

The person/s with Church Administrator designation can retrieve lists of congregants within a selected area on the map. Other users can see the dots of congregant households but do not have access to the congregant list.

Slides 5 through 8 and 10 are for CHURCH ADMINISTRATORS only. They include:

Uploading/Importing Congregants

Retrieving Congregant Plot Address Lists

Slides 14 and 15 are for AGENCY ADMINISTRATORS only. They include:

Displaying Congregants for Multiple Churches

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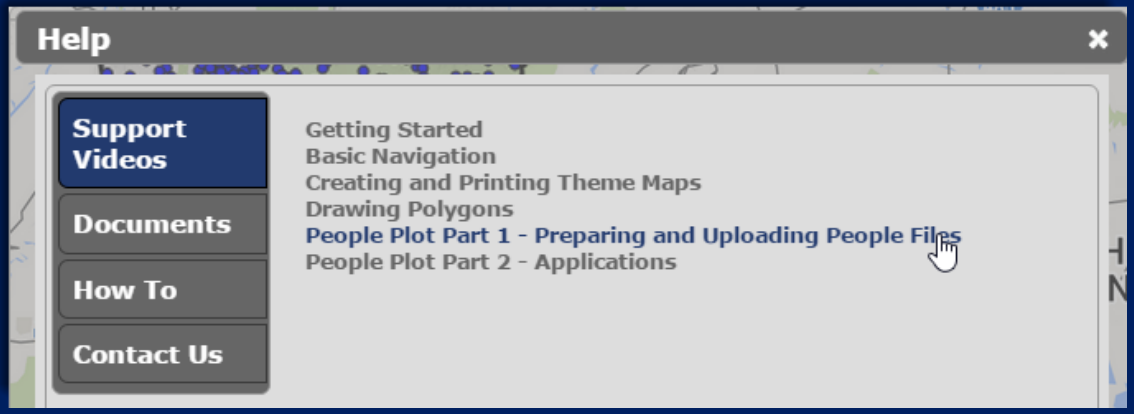
✓ Uploading/Importing Congregants

Login to your study from the PeopleView System and from the map screen select Support Videos from the drop down selections on the Help menu.

COMPLETE LOCAL CHURCH PREPARATION:

View the Support Video “People Plot Part 1” for essential instructions on local church activation (no cost) and the creation of a local “church administrator”.

For Church Administrators Only



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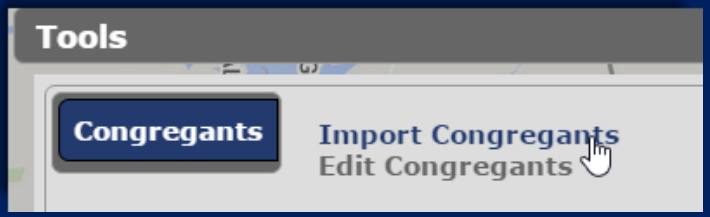
✓ Uploading/Importing Congregants

UPLOADING/IMPORTING CONGREGANTS:

The *Church Administrator* will:

(1) Select Congregants from the drop down selections of the Tools menu. A new Tools window will open.

(2) From the new Tools window select Import Congregants. A new Import Congregants window will open.



Import Congregants

Download sample

Instructions:	1. **Download Template for Congregant Plot**. You HAVE to use it to load your data, it is already set up with the proper field headings. 2. Download **Instructions for Uploading Congregants** 3. The fields marked in red are required to plot. 4. All other fields are optional. 5. For Congregant Status and Member by means please use the numeric codes. If you use other codes, you must match your codes to the MissionInsite codes using the Translation Tables. Click the appropriate Translation Tables. 6. Browse to select your file. Wait until the textbox turns green. 7. Click 'Upload'. **There will be a 15-minute delay after a successful congregant file upload for the ability to plot new congregants on the MI System.**
Church	
Congregant Status	Use Expected Congregant Status Codes OR **Edit Congregant Status Translation Table**
Member By Means	Use Expected Member By Means Codes OR **Edit Member By Means Translation Table**
Submitted By:	
Email:	
Select file	Choose File No file chosen — Upload
Upload status:	Browse to select your file then click Upload

For Church Administrators Only

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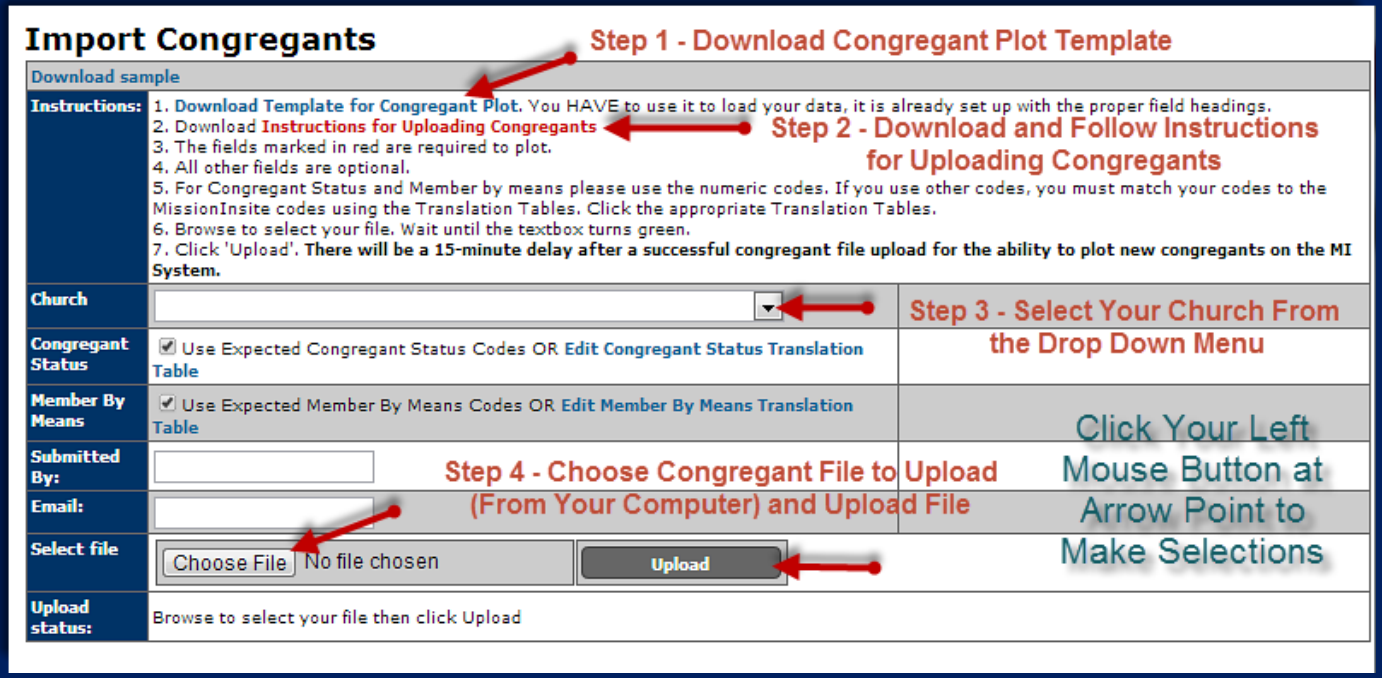
✓ Uploading/Importing Congregants

For Church Administrators Only

COMPLETE 4 STEPS TO UPLOAD/IMPORT CONGREGANTS

Follow the steps to Upload/Import Congregants shown on the Illustration below.



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✓ Uploading/Importing Congregants to Display by Attributes

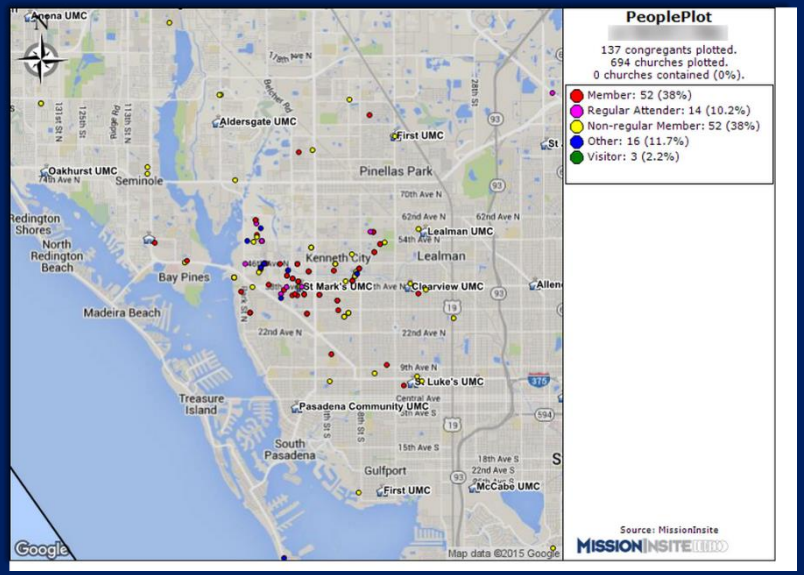
COMPLETE CODING EACH CONGREGANT FOR "CONGREGANTSTATUS" AND "MEMBERBYMEANS"

When preparing your congregant upload file, EACH congregant must have an attribute number in the "CongregantStatus" and "MemberbyMeans" fields in order to display congregants by attribute. **For effective reports each congregant must be listed individually – No combined household entries.**

See the Congregant File example below. The "Other" status or means code may be used to display unique information such as New Movers, Donors, Shut-ins,Youth, etc.

LastName	FirstName	Address1	Address2	City	State	Zip	Phone	Email	CongregantStatus	MemberByMeans
Brown	Mary	123 Main ST	Apt 2	Irvine	CA	92603	949.555.555		1	3
Brown	George	123 Main ST		Irvine	CA	92603	949.555.555		3	2

For Church Administrators Only



Congregant Status Codes	
Label	Code in data field
Member	1
Regular Attende	2
Non-regular Mer	3
Other	4
Visitor	5
Member by Means Codes	
Label	Code in data field
Profession of Fai	1
Transfer	2
Re-affirmation	3
Other	4

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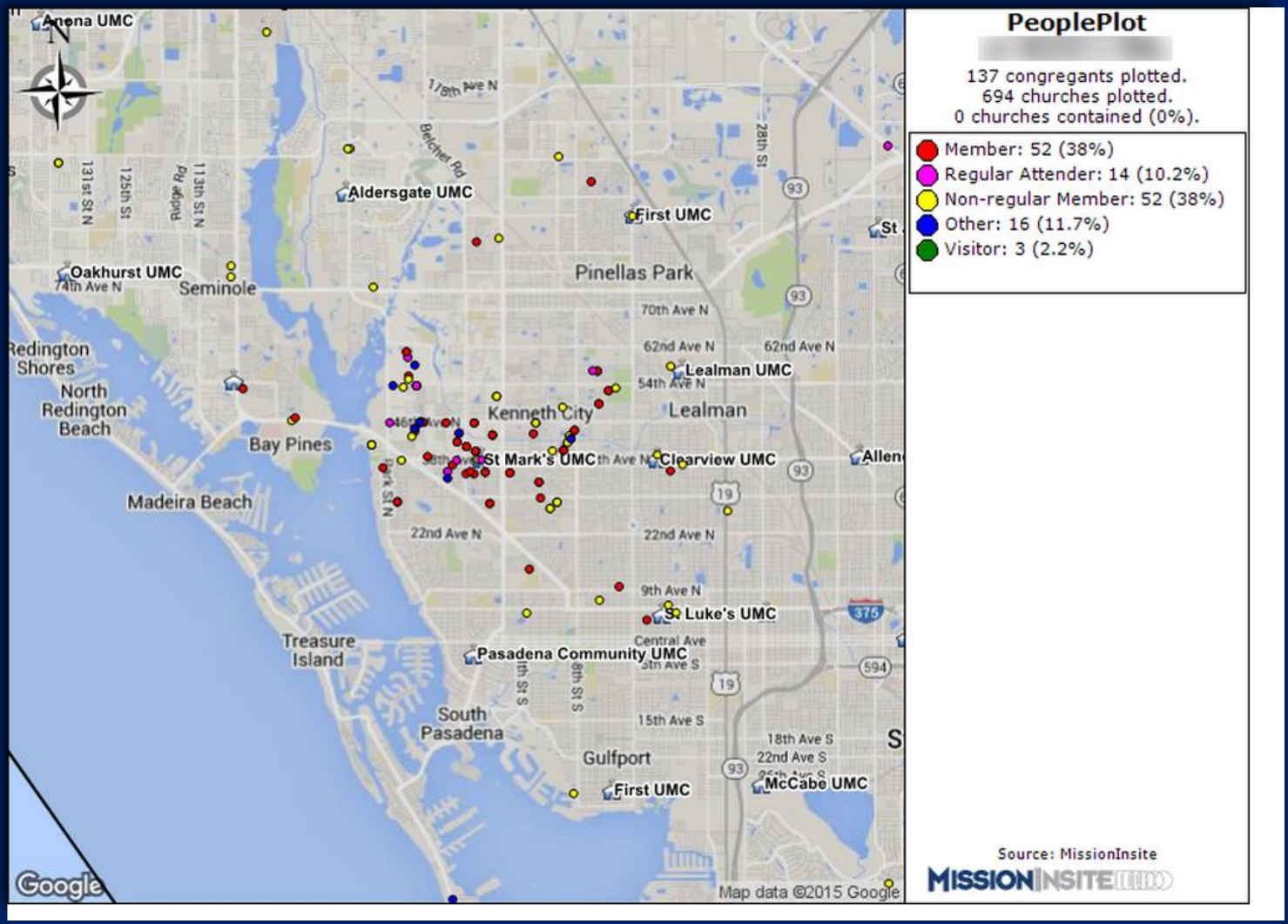

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For Church Administrators Only

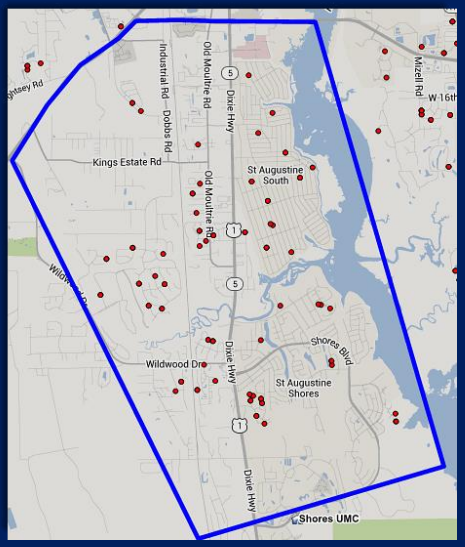
✓ Retrieving Congregant Address Lists

SELECT PLOTTING FROM THE MAP TOOLS TOOLBAR

Select Single Church, then select the church to plot congregants from the church drop down menu on the Select Plot Options window.

DRAW A CUSTOM SHAPE:

Draw a custom shape/polygon to capture the congregants you want to retrieve for your address list. See the illustration below.

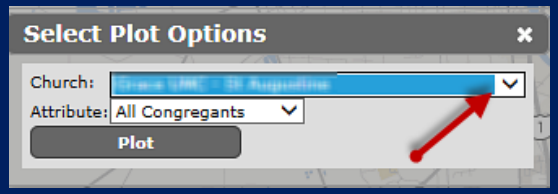


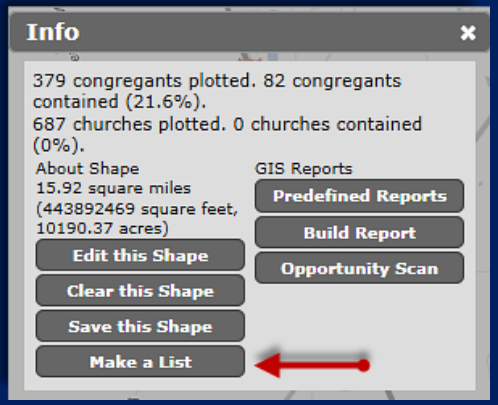
SELECT MAKE A LIST FROM THE INFO BOX:

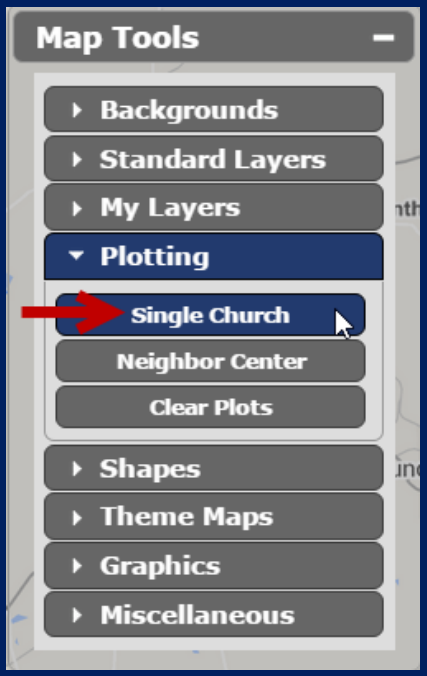
Select Make a List from the Info box.

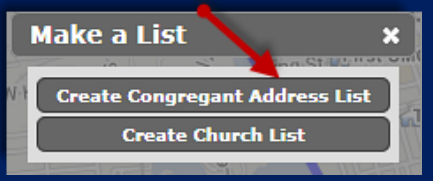
A new Make a List window will open.

Select Create Congregant Address List to create an Excel file containing selected congregants.









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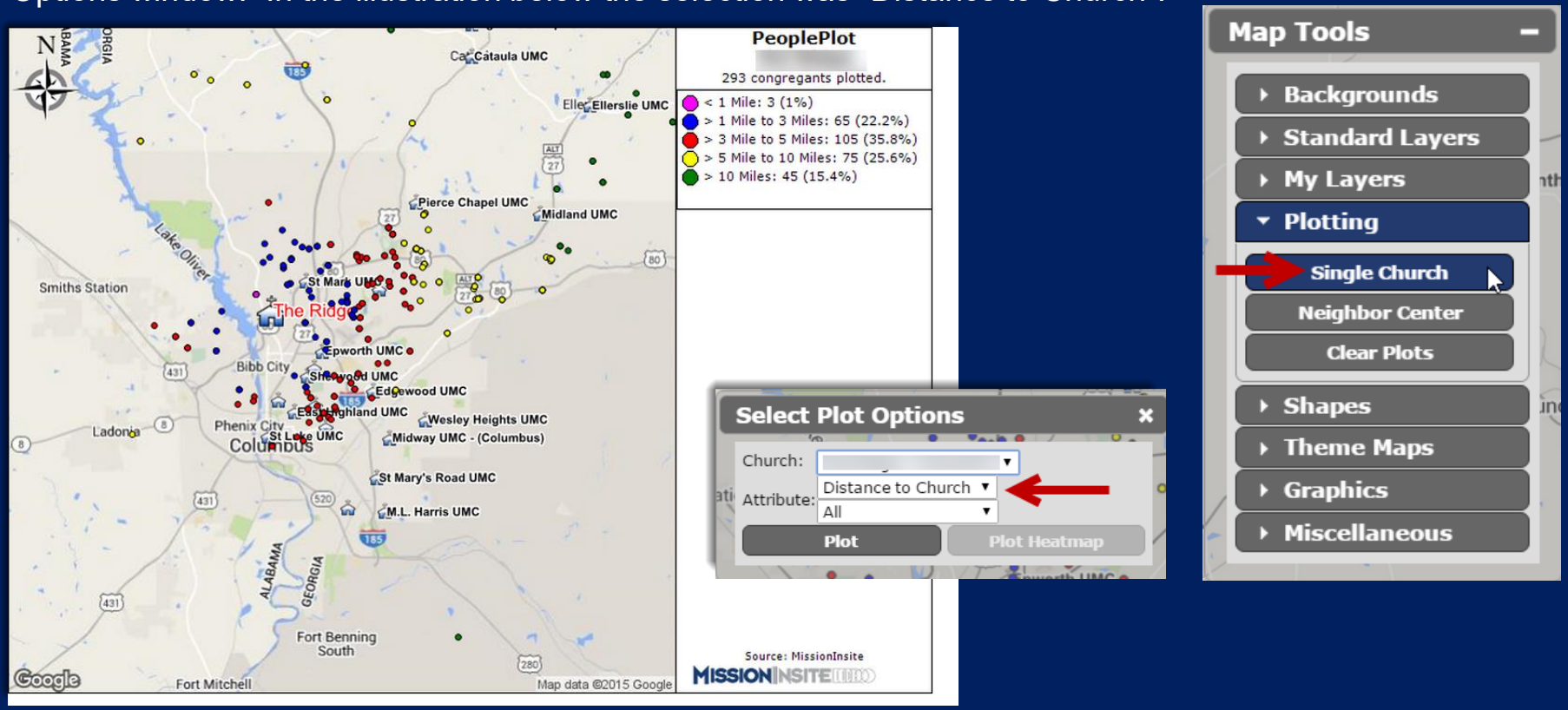
✓ Displaying Congregants by Attributes

SELECT PLOTTING FROM THE MAP TOOLS TOOLBAR

Select Single Church, then select the church to plot and the attributes you wish to plot from the Select Plot Options window. In the illustration below the selection was “Distance to Church”.



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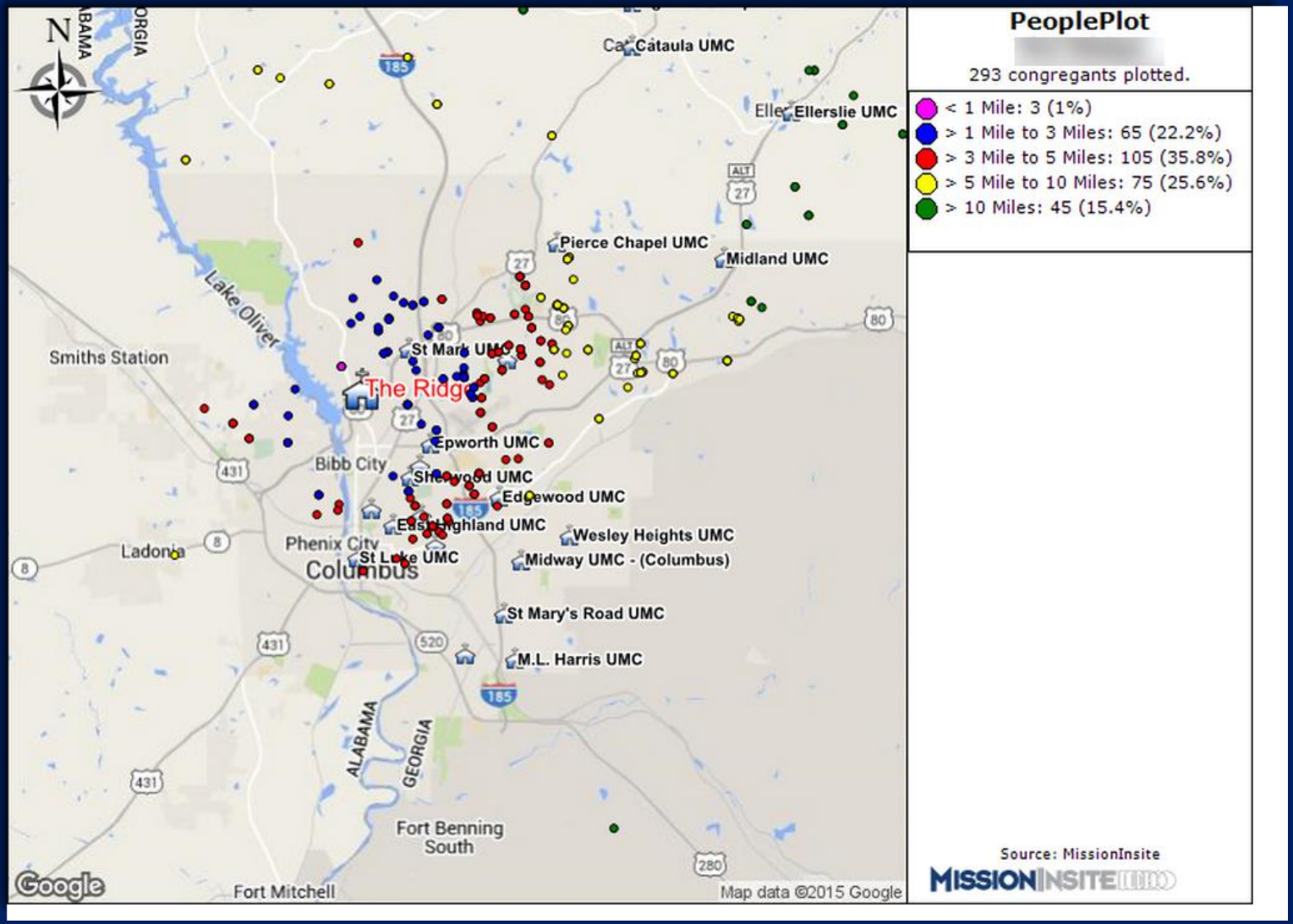

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CoreView

Who are our congregants in these neighborhoods

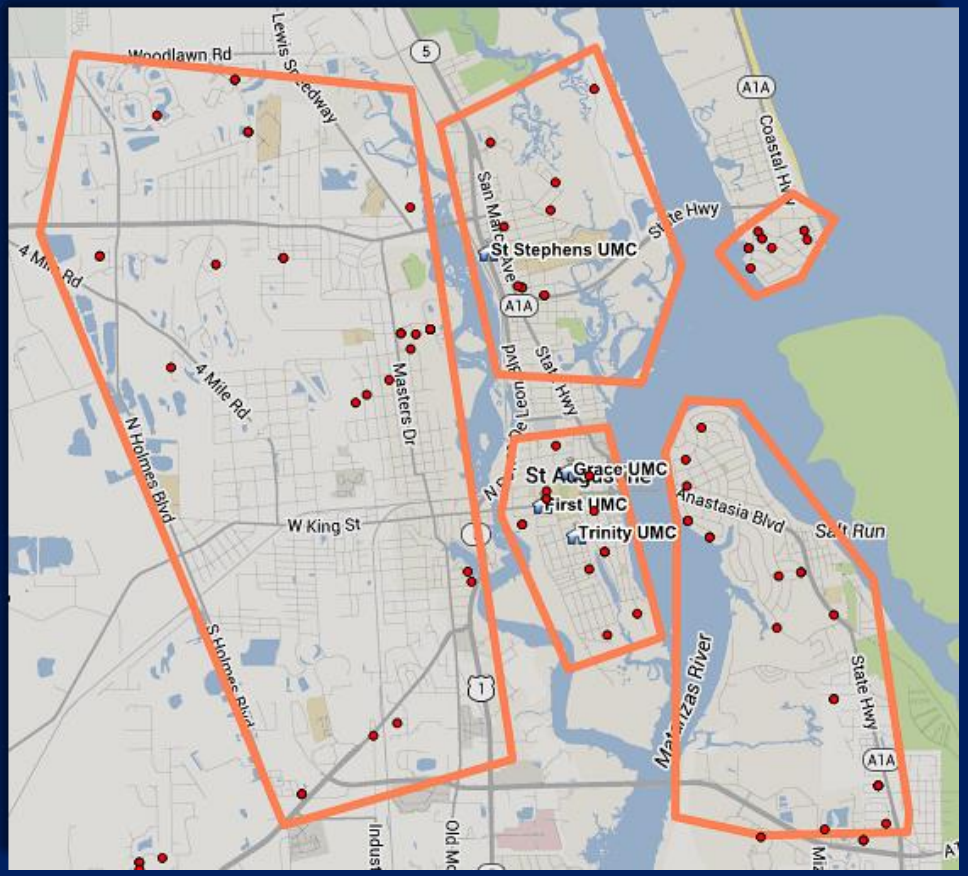
DISPLAY LOCAL/NEIGHBORHOOD AREAS:

Locate our congregants by neighborhood

Where do our active attendees live?
Where do our inactive members live?
Where do our visitors live?

Given our geographic footprint what ministry ideas emerge?
Where is our strength and where do we have opportunity?

See the ComparativeInsite Reports for additional Ministry Application information.



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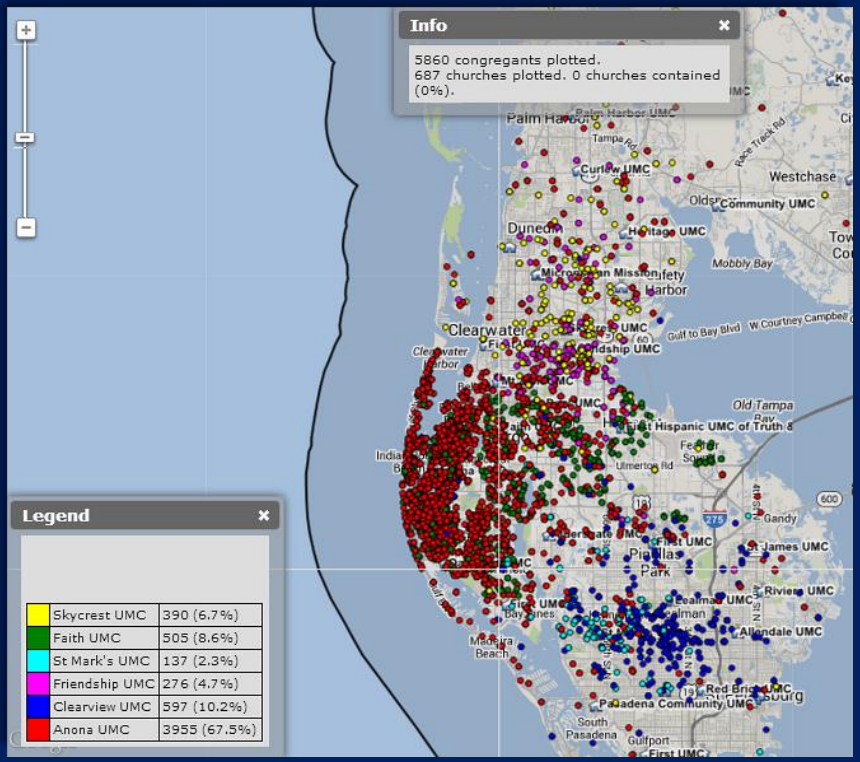
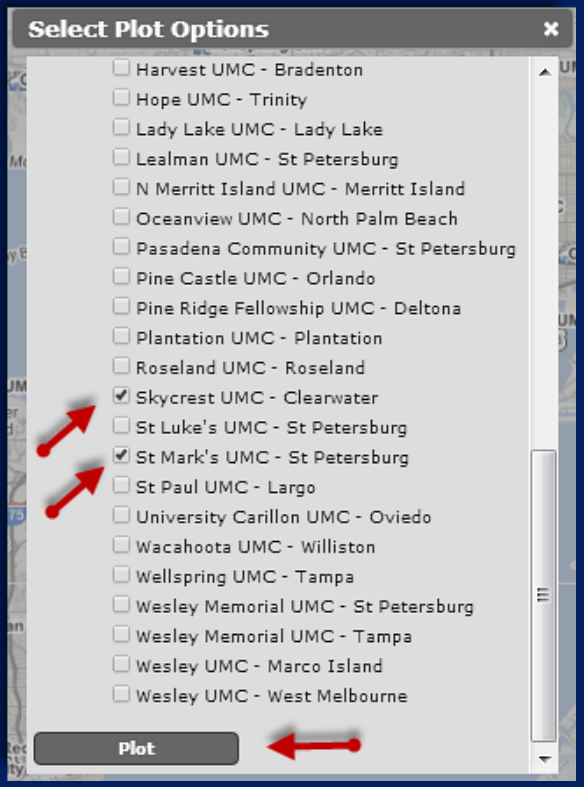
✓ Displaying Congregants for Multiple Churches

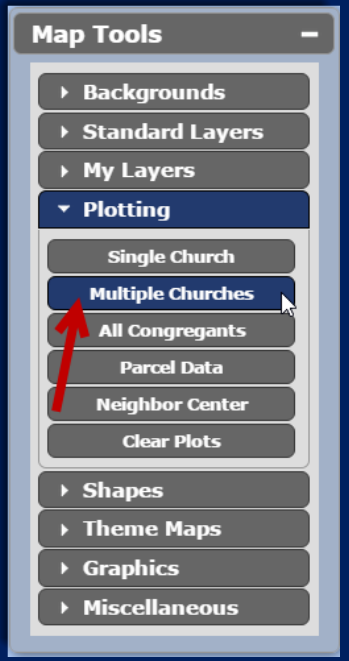
For Regional Agency Users Only

SELECT PLOTTING FROM THE MAP TOOLS TOOLBAR

Select Multiple Churches, then select the churches to plot from the Select Plot Options window by clicking the box next to the church name. Then click Plot.







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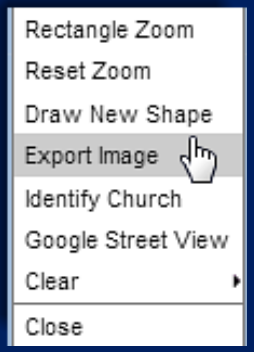
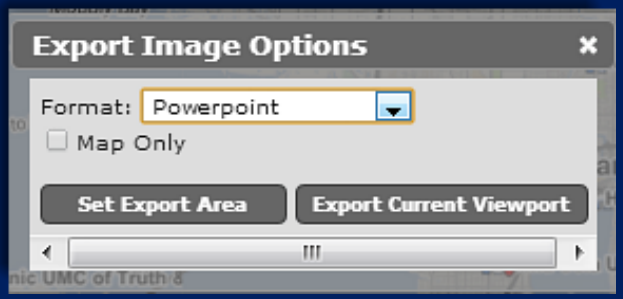
✓ Creating A Printable Map for Multiple Churches

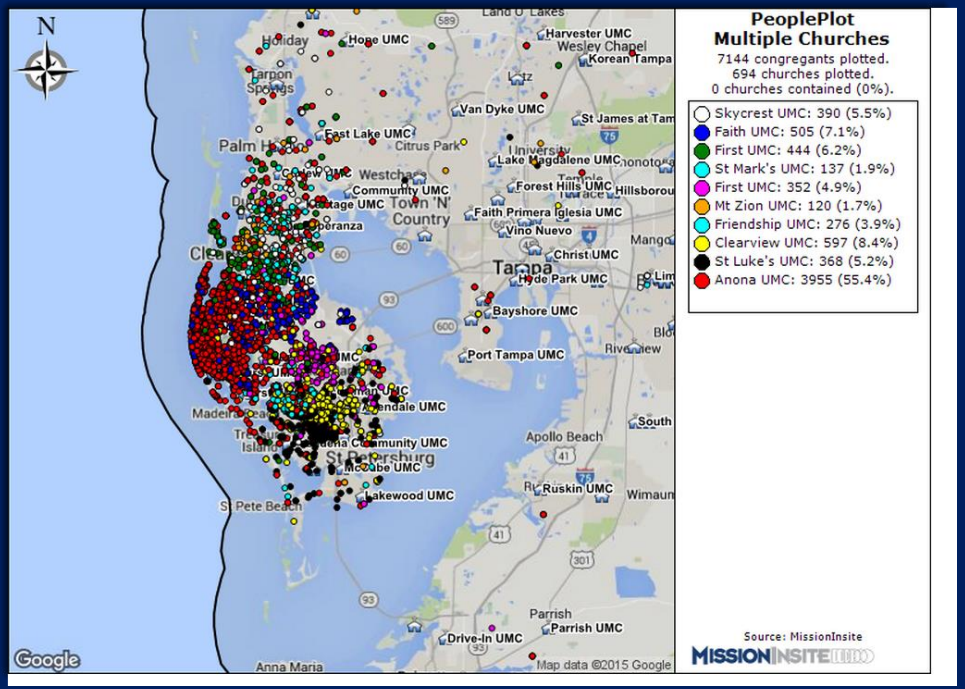
For Regional Agency Users Only

CREATING A PRINTABLE MAP

RIGHT CLICK your mouse button and from the new window select Export Image. Select your Format from the Export Image Options window. Select either Set Export Area to draw your own custom display area or Export Current Viewport to export the entire displayed screen. The resulting printable map will appear in a new window.







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This Completes

Organizational Identity

Who Are We?

Look for Other Advancing Mission Series Presentations Highlighting
PeopleView System Features