

Regional Agency Administrator User Guide

November 2008

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 clients password protected study area.

Demographics (MI Demo)

[Agency Admin](#) [Tools](#) [Demographics](#) [Thematic Maps](#) [Congregant Plot](#) [Custom Plot](#) [Opportunity](#)

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 has five administrative areas.

Agency Admin (MI Demo)

[Agency Admin](#) [Tools](#) [Demographics](#) [Thematic Maps](#) [Congregant Plot](#) [Custom Plot](#) [Opportunity](#)

[Edit Agency Info](#) [Edit Church Info](#) [Edit Users](#) [Set Congregant Plot Availability](#) [Registered User Report](#)

Edit Agency Info

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

Edit Church Info

This area includes address and contact information that was provided to MissionInsite to locate churches on the study map. Contact your Client Relations Manager prior to editing the address section of these records.

Edit 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.

Access Level	
<input type="checkbox"/>	ca - Church Admin
<input type="checkbox"/>	aa - Agency Admin

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 activate a registered local church user to use congregant plot. See [Activate Congregant Plot for Churches](#) 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 [Activate Congregant Plot for Churches](#) section later in this document for complete instruction for a successful activation.

Registered Users 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.

Activate Congregant Plot for Churches

There are three documents on the MissionInsite (MI) web site that provide instructions for Local Church Administrative Users on how to use Congregant Plot with their local churches. Click on the Local Churches Tab/Resources in order to access these documents. These documents are essential for a local church to use this resource.

The first document is entitled “**MI Local Church Congregant Data Instruction Packet.**” The Instruction Packet provides comprehensive and detailed instructions for:

- the functions of Congregant Plot
- how to prepare congregant data for uploading
- how to upload congregant data to the MI System
- how to view the congregant data for mission analysis and ministry planning

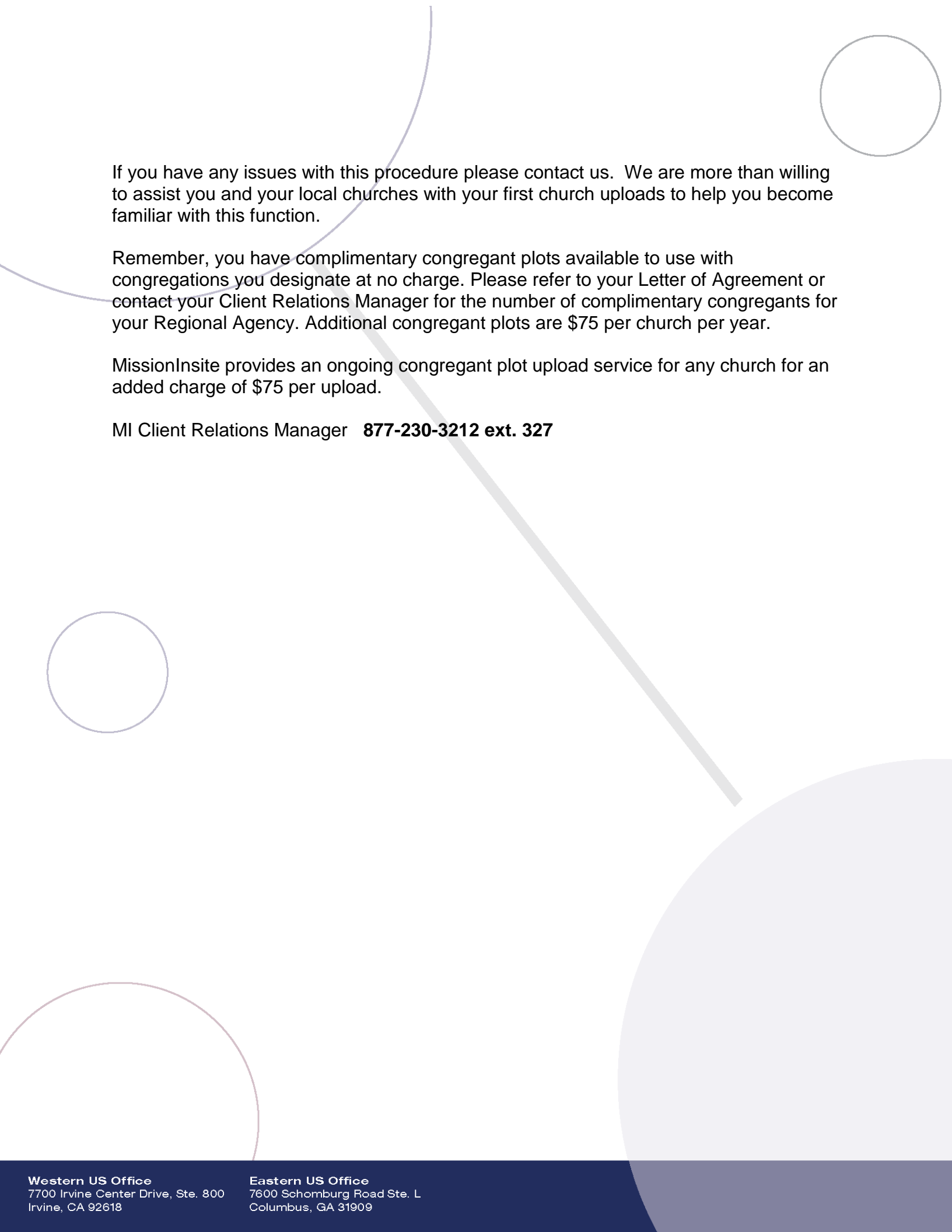
The second document is entitled “**Congregant File Upload Instructions.**” This Excel file illustrates the required format for a congregant plot data file. The file includes samples of the required and optional local church data fields. The formatting instructions MUST be followed exactly or the file upload process will not be completed successfully.

The third document is entitled “**Basic Congregant File Upload Template.**” This Excel file is a sample data template and may be used to capture the basic data necessary for uploading congregants. Optional data fields are not included, but may be added as stated in the **MI Local Church Congregant Data Instruction Packet.**

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 Set Congregant Plot Availability 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.
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 confidentiality of church congregant lists.

The Regional Agency Administrator creates a Local Church Administrative User in the “Agency Admin” section of the toolbar. Once “Agency Admin” is selected, select “Edit Users” from the menu choices. Next, choose the appropriate church from the dropdown list and click on “Create User” to create the user to be designated as Church Administrator. Then check the box for “ca - Church Admin” 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.



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.

Remember, you have complimentary congregant plots available to use with congregations you designate at no charge. Please refer to your Letter of Agreement or contact your Client Relations Manager for the number of complimentary congregants for your Regional Agency. Additional congregant plots are \$75 per church per year.

MissionInsite provides an ongoing congregant plot upload service for any church for an added charge of \$75 per upload.

MI Client Relations Manager **877-230-3212 ext. 327**