# MISSION INSITE

Community Engagement Specialists
For Faith & Nonprofit Groups

To **Engage** Your Community

Dive Into the **Demographics.**

**FaithConnect**
for faith-based and
religious institutions

**NPConnect**
for nonprofits

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## How to Register

### 1. Open Your Browser

Navigate to: MissionInsite.com. Mouse over the Client Center button on the home page. Select Registration. On the new Login/Registration Information page select "Register as a new user?" OR sign in using an external provider such as Google, Microsoft or Amazon.

If Registering as a new user - Enter Your Unique AGENCY ACCOUNT ID #:

Register as a new user?
Or Sign-In Using
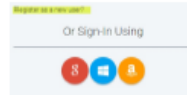
### 2. Begin the New User Registration Process

a. Select your city and your church or organization.
b. Complete boxes creating your unique User Name and Password. You may also use an external provider to create your account.
c. Review terms and (1) check the "Accept Terms" box. Please Do Not check the box to opt out of email communication from MissionInsite. We want to be certain every user is informed about system updates and new features. (2) Click "Register".
d. You will receive an email entitled "Confirm Your Email" asking you to confirm your email address by clicking on a confirmation link in the email. This link will be valid for 24 hours. Check your Spam/Junk box if the email does not appear in your Inbox.
e. Following your email confirmation, your new account MUST be approved by your Agency Administrator. You will be notified by email once your account has been approved.
f. For future logins, hover over Client Center button on the MissionInsite Home Page and select "login" from the drop-down menu.
g. Do not make multiple attempts at registration. If a problem occurs, please contact us for support. 877-230-3212 Ext. 1011 or misupport@missioninsite.com
h. Only one User Name and Password per user. For users with multiple agency relationships (i.e. a local church/organization AND agency user), please contact your agency administrator to add additional study area options to your login.

### 3. User Assistant Screen

The User Assistants Screen provides access to essential tools most often used in the PeopleView™ System. Resources are organized by theme and through a series of guided questions will assist the user in accomplishing the selected task. Click each button to view these key resources.

### 4. Introducing CoreView, CommunityView and FusionView

Plot People

Generate Demographics Reports + Create Thematic Map

Plot People + Generate Demographics Reports

**Who are We?** CoreView begins with People Plot. People Plot provides insight, organizational identity and reach of your church or organization - these are your core assets

**Who is our Neighbor?** CommunityView informs you about your mission field diversity.

**How do we Engage Our Community?** The ComparativeInsite Report in FusionView employs discoveries and learnings from CoreView and CommunityView to assist in development of strategic solutions for mission.

### 5. Essential Support Resources

(Click on the Help Tab on the Lower Right of the Navigation Toolbar on the Map Screen) The Help Menu will open in The Control Center on the right side of the map screen. Contains Topics, Support Videos, Contact Us, and the Feedback Option. Review each tab to discover the wealth of material available to assist you in your use of the PeopleView System.

< HELP
Documents
Overview Videos
Contact Us
Feedback

Resources Include: The Mosaic Household Portraits Mosaic USA Group Segment Descriptions by Experian (71 Individual Segments & 19 Groups) plus the Mission Impact Mosaic Application Guide by Bandy (Practical ministry application suggestions for each Mosaic segment: Leadership, Hospitality, Worship, Education, Small Groups, Outreach, Property and Technology, Stewardship/Financial Management and Communication)

### 6. Generate Quick CommunityView Reports from the Assistant Window

Select Generate Demographic Reports from the User Assistant Window. If the Assistant Window is not open at login, click the User Assistant Window Icon at the top of The Control Center. Generate Demographics Reports will assist users in rapid and easy creation & customization, for all geographies, of QuickInsite™, ExecutiveInsite™, FullInsite™, or Quad™ Reports such as MinistryInsite and ReligiousInsite.

Your Unique Agency Account # Appears on the "How to Register" Document

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## After selecting "Register as a new user?" this window will open

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## PeopleView™ Registration

Instructions: Your regional agency has been provided an account number. Please type that account number in the 'Agency Account Number' field. Click submit and the name of your agency will appear. Next, select your city from the 'Select your city' menu. Finally, select your church from the 'Select your church' menu.

District/Agency Account Number

Enter Agency Account # Here

**SUBMIT**

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# PeopleView™ Registration

## Organization Details

First, we need a bit more information about your Agency. You can use the selection boxes below to select the city and organization you work with.

Select your city

**Select Your City**

Select your organization

**Select Your Church**

Azale
Berea
Broad
Christ
Christ
Colleg
Conw
Emma
Faith
First U
First U
Solid
Korea
LifeSc
New L
Pine C
Reeve
Spring
St Luk
Peace

Now, let's collect some additional information about you

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## PeopleView™ Registration

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### Church Details

First, we need a bit more information about your Agency. You can use the selection boxes below to select the city and church you work with.

Select your city

Columbus ▾

Select your church

▾

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### Login Setup

You can create a MissionInsite account using your email address.

Email

✉

**OR**

Password

🔒

Confirm password

🔒

Use an external provider to create your account.

After clicking the provider option below, you will be redirected to that providers login. Once you've logged in, we'll return here to complete your registration.

**REGISTER WITH GOOGLE**    **REGISTER WITH MICROSOFT**

**REGISTER WITH AMAZON**

![MISSION INSITE — Community Engagement Specialists for Faith & Nonprofit]

## General Information

Now, let's collect some additional information about you.

First Name

Last Name

Role/Position

Authorized Church/Organization User: Licensed access to this site is for the exclusive use of this Church/Organization and exclusively for its mission planning. Personal use or use for a business or another organization other than the licensing agency is expressly forbidden. User also agrees not to share his/her username or password with anyone else. Failure to abide by these terms will be a violation of this license agreement and may result in the revocation of access to this user.

Organization Location Advisory The first step after completing the registration process is to login to your local organization. The current location was provided by your agency and in some cases the address information is incomplete and does not allow an accurate placement of your organization. (This is more likely to happen for locations in rural areas.) There is no cause for alarm. It is an easy process to move your organization's geographic location on the map once we receive additional information from you. Normally, this change can be made within 48 hours. Simply send an email to your Agency Administrator or to MissionInsite at misupport@missioninsite.com with additional information on your organization's location. Please note: Though your organization may be temporarily in the wrong location, the demographic information is accurate for the area. Individual organization locations are an added overlay and do not influence how the underlying demographic data is stored and reported.

☐ Accept Terms

Authorize to Send Emails: From time to time, MissionInsite adds new features, updates the system or introduces new resources to support you in ministry. Our primary mode of communication is your email address. However, by law, we must give you the option to not receive such correspondence. If you do not want to receive these updates, check the box below. **Remember, if you choose to check the box opting out of future emails, we will not be able to inform you of changes.**

☐ I do not want to receive any email correspondence about system enhancements and special feature opportunities.

**REGISTER**

## A New User Approval Process

We are pleased to have more than 5 million people plotted on the MissionInsite PeopleView<sup>tm</sup> System. Confidentiality continues to be increasingly more important to MissionInsite clients. As such, MissionInsite is instituting an opt-in requirement for each new user.

When a new user registers for an account, an "agency admin" <u>must approve that account </u>before the user is granted access to the PeopleView<sup>tm</sup> System. This is to ensure users can't simply register for use of MissionInsite and receive immediate access without some level of oversight.

# A Brief Explanation of the "Approval Process"

**New User Registers**

- User Enters the Agency ID Code and Selects Their Faith Based/Nonprofit Organization

**"Confirm Your Email" is Sent**

- The new user retrieves their new user email from MissionInsite and confirms their email address

**"Approval Required" Email is sent to all Agency Administrators**

- An Agency Administrator Approves or Denies the New User Registration

**User is Approved or Denied**

- Email is Sent to New User Confirming Approval for Login!

**The entire approval process can be completed in under a minute!**

# New User Confirmation of <u>Their</u> Email Address

**To:** test100@decisioninsite.com
**CC:**
**Bcc:** * Note: BCC is Estimated from Header RCPT TO that Do Not Appear in To or CC fields.
**From:** DISupport@decisioninsite.com
**Subject:** DecisionInsite - Confirm Your Email
**Attachments:** *None*

**HTML View**

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Dear Test Testerson,

Thank you for registering as a user of the MissionInsite PeopleView System. To activate your account you MUST validate your email address. This will co... ...gistration. Please note, this link is only valid for <u>24 hours</u>.

**Confirm My Email Address and Activate My Account**

If your browser will not open the link, copy and paste the link below into the address line of your browser and proceed:
http://auth.di-test.com:44362/Account/ConfirmEmail?userId=b9dd3b60-9230-4d4a-8c27-
dfcce354a3b1&code=CfDJ8NAyezgZqOBJpgkr7YpWZnCLmvY65jpqHREXKElksSw%2BV3xTDJwthq859VRDxI%2FhFFeZGQiQTM1Gk0L4nI0nQDsaDF0CgMhQk4qUvWHOMORWuQ3C6n8Ur7uI0inG%2B%2FSW8kb%2F%2FmOW8LVxIpyN

Following your email confirmation, your account will need to be approved by the district adminstrator. You will be notified by email once your account has been approved.

Thank you,

**The MissionInsite Team**

New User - MUST Click on link to confirm THEIR email

# "Approval Required" Email Sent to All Administrative Users

**To:** Test68@decisioninsite.com
**CC:**
**Bcc:** * Note: BCC is Estimated from Header RCPT TO that Do Not Appear in To or CC fields.
**From:** DISupport@decisioninsite.com
**Subject:** DecisionInsite - New User Needs Access Approval
**Attachments:** *None*

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**HTML View**

Dear PeopleView™ Admin User,

Test Test (test108@decisioninsite.com) has just registered for the the MissionInsite PeopleView System and needs approval before they will be given access to log in.

The registrant's email is **test108@decisioninsite.com**.

[Approve User]  [Deny User]

Agency Administrator Selects Approve or Deny

To check registration information and usage, please view the Registered User Report.

Thank you,

**The MissionInsite Team**

## Note: New Users will not have access to the PeopleView™ System Until Approved by their Agency Administrator

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## So, what happens after a New User registers… but before they're approved by Agency Administrator?

**Immediately upon registration, a new user is granted access to the Underline User Portal. The new user may then:**

1) **Resend the email confirmation link to their Agency Administrators (to remind them to grant approval)**

2) **Check their access approval status**

3) **Setup 2 Factor Security Authentication for login**

4) **Configure external login providers such as Amazon, Google or Microsoft**

**These features will be available to the new user in the User Portal before being granted access by their Agency Administrator to the MissionInsite PeopleView™ System.**

**"Account Approved" Email Sent to New User after Agency Administrator approval.**

**To:** test108@decisioninsite.com
**CC:**
**Bcc:** * Note: BCC is Estimated from Header RCPT TO that Do Not Appear in To or CC fields.
**From:** DISupport@decisioninsite.com
**Subject:** DecisionInsite - StudentView™ Account Approved
**Attachments:** *None*

**HTML View**

Test Test,

Your **MissionInsite PeopleView** account request has been **approved**.

You can now log in to **PeopleView** at maps.di-test.com:59286.

Thank you,

**The MissionInsite Team**

**Note: New Users will now have access to the PeopleView™ System**

# How Do I Manage My MissionInsite Profile?

Click on the User Icon on the Control Center HOME Screen

(You May personalize the button with a photo if you choose)

# How Do I Manage My MissionInsite Profile?
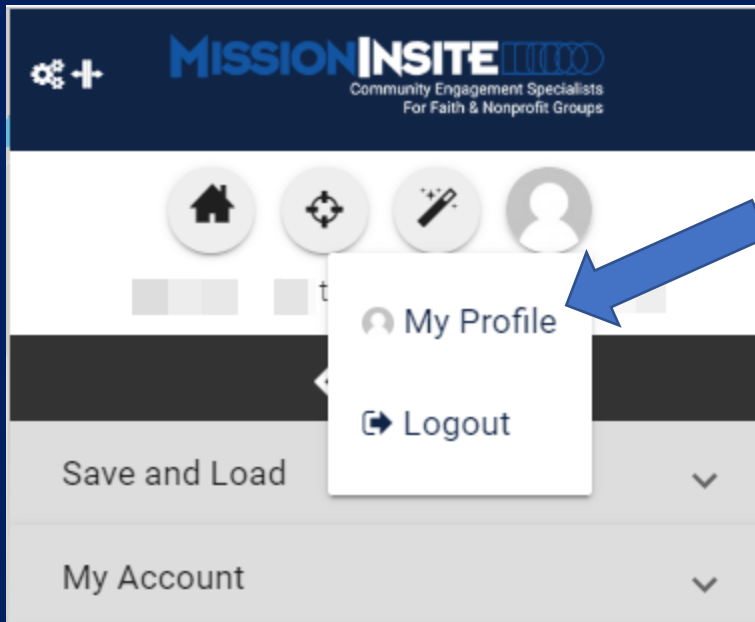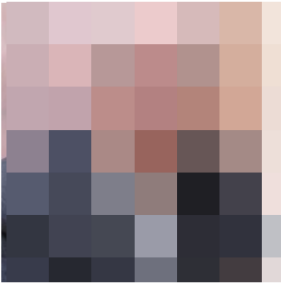
After clicking on the User Icon a dropdown menu appears and then click "My Profile"

# How Do I Manage My MissionInsite Profile?

## Manage your account
Profile

Account Status ✓

Email

Username

First Name
Chuck

Last Name

Role/Position

**SAVE**

Active Sessions
↪ Logout of All Sessions

### User Management Portal
Windows 10 ⊘ Chrome
Last Active 1 second Ago
🇺🇸 Phenix City AL US (75.57.16.54)

### StudentView/PeopleView
Windows 10 ⊘ Chrome
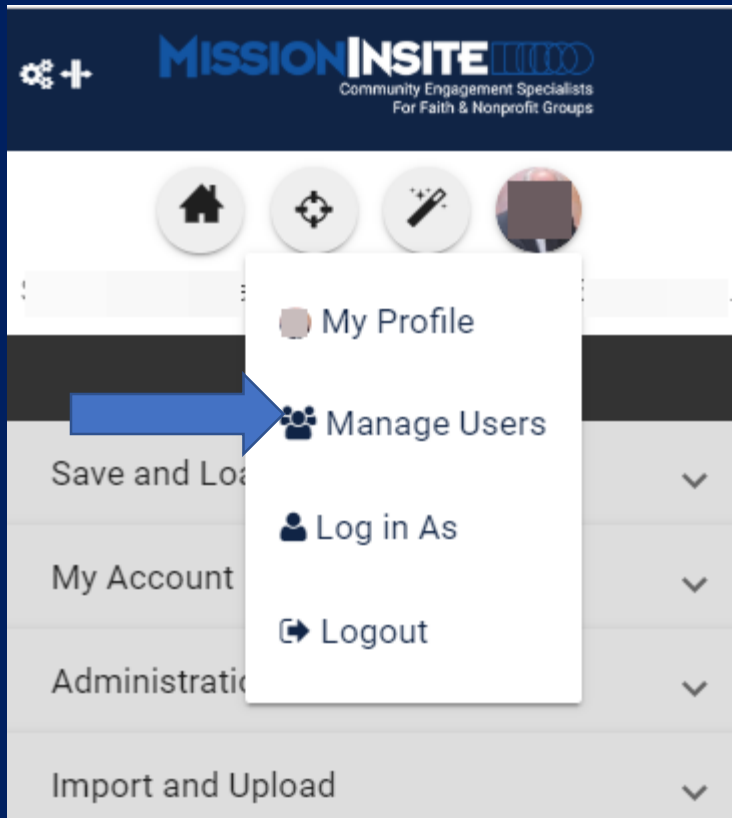Last Active 4 minutes Ago
🇺🇸 Phenix City AL US (75.57.16.54)

Change My Profile Picture

In the "Manage your account" window you may change your email, username and other account information.  It also displays your "active sessions".  In this case my "active sessions" are the PeopleView[tm] System and the User Management Portal.

# How Do I Manage My Agency Users?

Agency Administrators will be able to access management of their users from this same menu by clicking on "Manage Users". We will cover the Manage Users process in another presentation.

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**misupport@MissionInsite.com**

**877-230-3212 Ext. 1011**