



PeopleView MissionInsite Instructions

CREATE PERSONALIZED CONGREGANT DOWNLOAD

Background Information

Annually (in Fall), the Office for Missionary Planning and Leadership uploads the latest congregants into MissionInsite. This information is provided by the parish to the Development Office.

- ▶ We will inform you when the latest congregants are updated through the *Missionary Leader Update*.
- ▶ We use the default congregate template and only upload address, plus telephone number & email if listed on Development Office census.
- ▶ **Note:** The information is only as accurate as what you report to the Development Office.

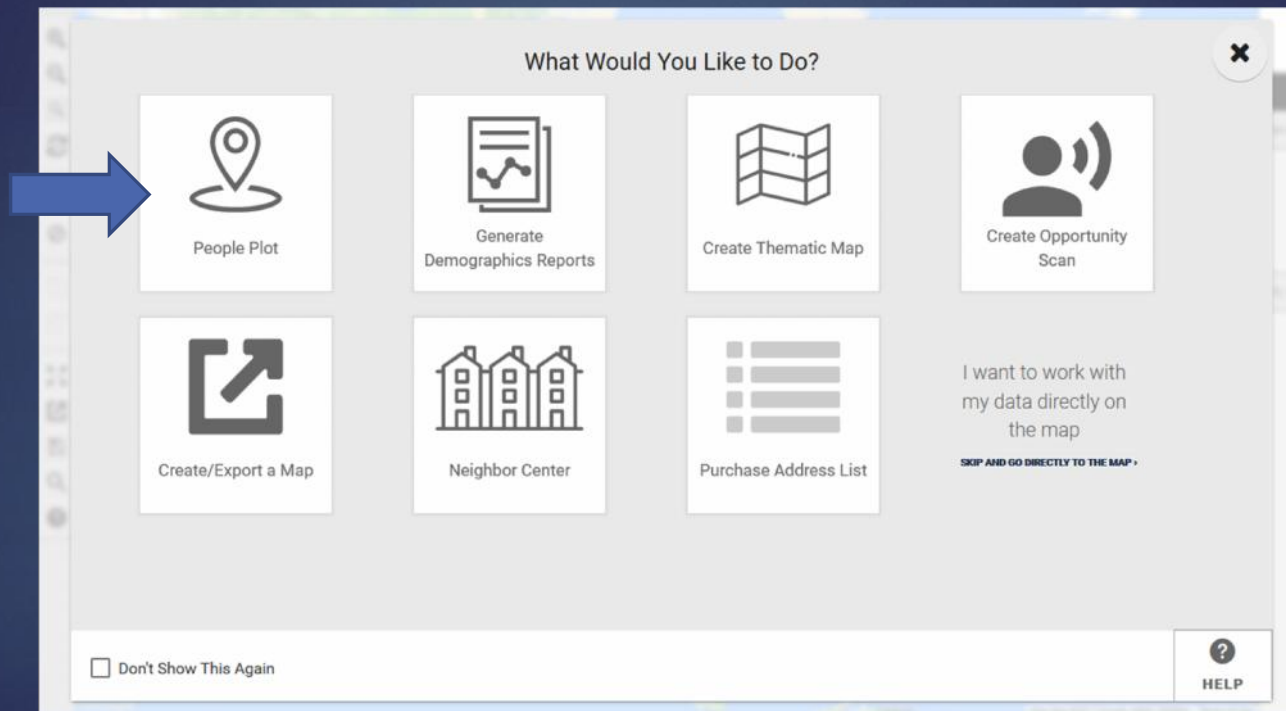
Download Personalized Congregants

You may want to track more than what the Missionary Planning and Leadership office does on MissionInsite. Possible listings include (but are not restricted to):

- ▶ Volunteers and their ministries
- ▶ Senior citizens
- ▶ Parents with school age children
- ▶ Committee members
- ▶ Date parishioner joined the parish
- ▶ Capital campaign donor
- ▶ Sacrament dates
- ▶ **Note:** The information will only be as accurate as what you enter into the system.


Go to PeopleView

When the cubes appear click on *People Plot*.



Click on *Upload People*. The cube will turn blue.
Click *Next*.

First, Would you Like to Plot People or Upload People? ✕



Plot People

Upload People

How to Upload People for People Plot - Video

Click on **+ Add New People Type**.
Click **Next**.

MissionInsite People Upload

First, Select a study and people type from the list below. To add a new people type, select the option "Add new people type".

Select a study *

Archdcsof16Base

Select a people type *

+ Add new people type

Congregants (Default)

Schools

Students

Students Default



Create the name of your personalized list. **NOTE:** Do not choose Congregants (Default); it will overwrite what our office uploads.

Create people type

People Type Name *

Along with the standard fields "FirstName, LastName, Address1, Address2, City, State, ZipCode", you can add five additional numeric attributes, text attributes and date attributes. Please specify the optional attribute below to include in the upload.

Optional Attributes

Numeric Attributes	Text Attributes	Date Attributes
Numeric Attribute 1	Text Attribute 1	Date Attribute 1
Numeric Attribute 2	Text Attribute 2	Date Attribute 2
Numeric Attribute 3	Text Attribute 3	Date Attribute 3
Numeric Attribute 4	Text Attribute 4	Date Attribute 4

Complete the Optional Attributes. You can add up to 5 additional attributes for each numeric, text and date, along with the regular name and address. See *next slide for some Attribute suggestions*. When done click **Next**.

Create people type

People Type Name *

Along with the standard fields "FirstName, LastName, Address1, Address2, City, State, ZipCode", you can add five additional numeric attributes, text attributes and date attributes. Please specify the optional attribute below to include in the upload.

Optional Attributes

Numeric Attributes

Numeric Attribute 1

Numeric Attribute 2

Numeric Attribute 3

Numeric Attribute 4

Text Attributes

Text Attribute 1

Text Attribute 2

Text Attribute 3

Text Attribute 4


Date Attributes

Date Attribute 1

Date Attribute 2

Date Attribute 3

Date Attribute 4



Potential Attribute Options – Do what works for your parish.

Numeric Attribute:

- ▶ Number of children in household
- ▶ Number of years as parishioner
- ▶ Envelope number

Text Attribute:

- ▶ Name of spouse
- ▶ Single/Marital status
- ▶ Capital campaign donor – yes/no
- ▶ Ministries involved in

Date Attribute:

- ▶ Date joined parish
- ▶ Anniversary date
- ▶ Baptism date, confirmation date, etc.

When you click *Next* the box below appears, which shows your name and email. Click *Next* again.

MissionInsite People Upload

Submitted By *

| Susan Skibba

Email *

| skibbas@archmil.org

Upon successful upload and processing (geocoding) of the file, you will receive an email confirmation with the preliminary analysis of the upload.

Your personalized template is now ready. Click on *Step 1* to download your Excel template and start inputting your data. **Note:** You must input name and address for each entry.

Note: In this example, I called it Test, but call your template whatever you want.

MissionInsite People Upload

Test Upload

1) Click here to download the template for Test

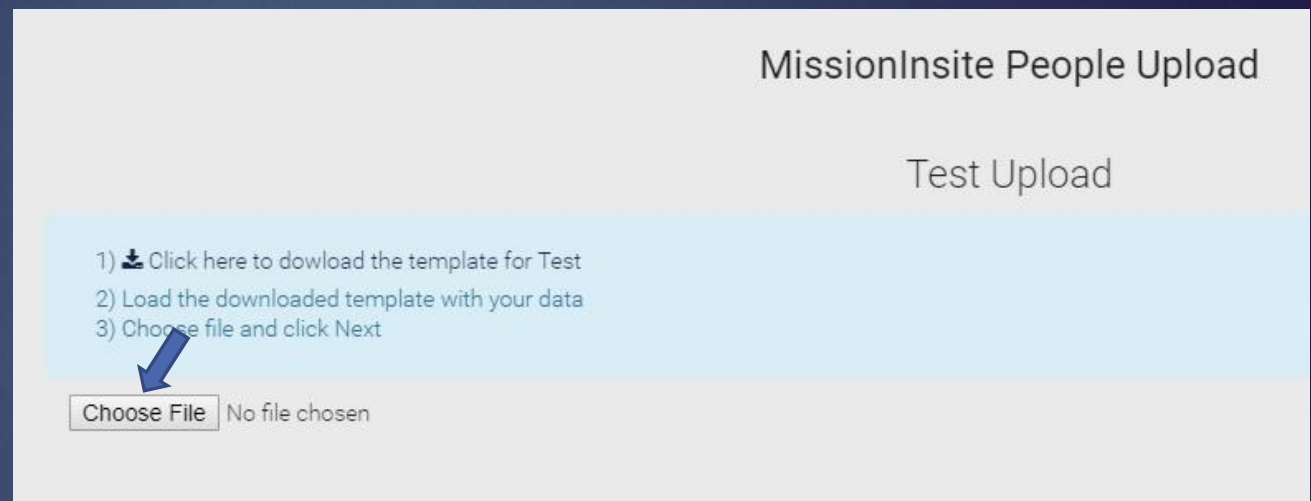
2) Load the downloaded template with your data

3) Choose file and click Next

Choose File No file chosen

Once you have uploaded the template with your information, for **Step 3** you choose the file and then click on **Next**.

Note: You may not want to complete all the data the same day. My suggestion is to complete a few entries so that you can download something. Then on another day, when it is complete, your named template will be an option when you go to upload.




Once you upload, you will receive a message that lists possible *Errors* and *potential problems*. If necessary, update your file and upload again.

MissionInsite People Upload

Please correct the errors below:

NOTE: Errors must be fixed before you can download



Blank Addresses

Number of Test with blank addresses: 3 or 100% of the total number of people. This exceeds the maximum number allowed, please update the file and reupload.

Blank City


Number of Test with blank cities: 3 or 100% of the total number of people. This exceeds the maximum number allowed, please update the file and reupload.

Blank City

Number of Test with blank address, city, state and zip code: 3 or 100% of the total number of people. This exceeds the maximum number allowed, please update the file and reupload.

Please review the items below for potential problem:

NOTE: Potential problems do not need to be fixed before you can download



If everything is fine, click *Save People into the MI System*.

MissionInsite People Upload

If there are no issues or errors, click the button 'Save people file into the MI System' below to complete the import process.



 SAVE PEOPLE FILE INTO THE MI SYSTEM

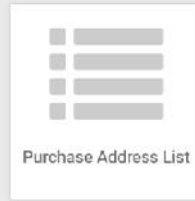
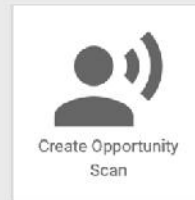
A second box will appear, stating that your people have been successfully uploaded. MissionInsite will also send you an email stating that your file has been imported. It usually takes 24 hours before you can plot your personalized congregant download.

MissionInsite People Upload

Your people file has been successfully imported into the MI System.

Note: Once your personalized congregant list has been uploaded, it will appear as an option when you next go to *People Plot* and then go to either *Plot People* or *Upload People*.

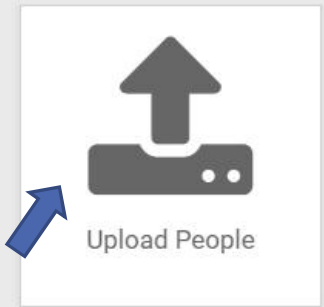
What Would You Like to Do?

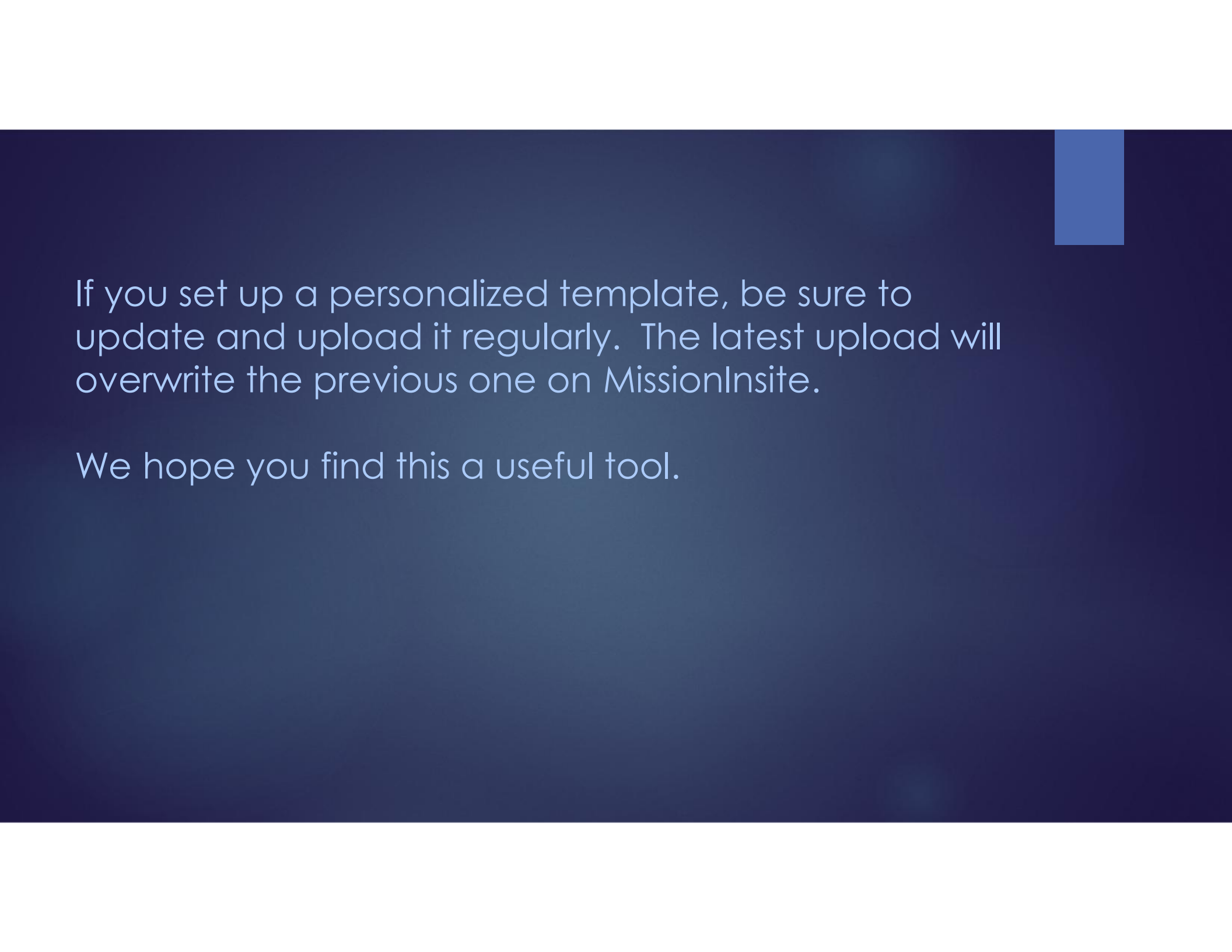


I want to work with my data directly on the map

SKIP AND GO DIRECTLY TO THE MAP

First, Would you Like to Plot People or Upload People?





If you set up a personalized template, be sure to update and upload it regularly. The latest upload will overwrite the previous one on MissionInsite.

We hope you find this a useful tool.