

# Directories



## Introduction

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Directories are a type of group within **ChurchInsight** whose members are organisations, as opposed to users. A directory can be used to store organisation's details. These can then be displayed on your website and used for mailings. This guide explains how to set up a directory, add organisations and their staff members.

## Creating a Directory

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- If you haven't logged into the web site already, do so now. Click the **Login** link on the homepage and enter your login name and password. Click the **web office** link to enter the web office administration area.
- Select a  **group folder** or the  **root group** beneath which you would like to add a directory. The main work area will be updated with the **Summary** view for this group.
- Click the **Advanced Options** link at the bottom of this area.

**Advanced options not available?** You will need the **group structure** permission in order to create a directory. Contact your local web site administrator for the necessary permissions.

- Click the  **Create a sub-group below** *groupname* task.
- Enter a name for your new directory e.g. 'Partners', then select the *Directory* option from the **group type** selector.

If the **Directory** option isn't available you need the **Directory Admin** Permission granted, which is part of the *Site Manager, Member Info* permissions.

- Click the **Create Group** button; you will be re-directed to the **Summary** tab of your newly created **Directory**.

**Can't see your Directory on the site?** You won't be able to see your Directory on your Web site until you have added an organisation and have added a 'Directory' component to the layout. Follow the instruction below to add an organisation and display it on your website.


## Creating Organisations

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Organisation details and staff members can be stored in a Directory and displayed on your website.

An organisation can be added in the following ways:

### ➤ Individually through the Web Office

- Select the  **Directory folder** that you would like to add an organisation to.
- Click the **Organisations** tab
- Select the '**Create a new organisation in the *DirectoryName* directory**' task.
- Enter the *Name* and *Description* of your organisation and click the 'Create Organisation' button.
- Add any further details about your organisation by selecting the relevant tab and adding the relevant details e.g. Address.
- When complete, click the **Save and exit** button.

### ➤ Multiple organisations can be added from a file

When initially setting up your Directory you may have an existing organisation database you could import. If you export the database as a *Comma Separated File* .csv then you can import the organisation records as follows:

- Click the **Organisations** tab.
- Select the '**Import organisations from a CSV file**' task.
- Follow the instructions in the '**Import Records**' wizard to add your organisations. Note Staff members can't be imported from a file.

### ➤ Through organisation registrations


You can setup your directory to allow users to register their organisations, just like with users. This can be setup as follows:

- Click the **Summary** tab and the **Advanced options**.
- Under the **Registration Options** select the appropriate level of membership required to register an organisation. e.g. Visitors.
- When the directory is published on the site if the current user meets the directory registration criteria they will see a link to **Add another organisation to this directory**. Following this link will allow the user to register an organisation.
- To approve the organisation select the organisation directory, then the 'Organisations' tab and select the appropriate listed organisation applicant. This will open the organisation details window, from which the '**Approve this organisation's application**' task can be selected'.

## Adding Staff Members

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Staff member's details can be stored, and if desired, displayed in the organisation's details. A staff member can be added as follows:

- Locate the organisation you wish to add staff members to be first selecting the relevant  **Directory folder** that the organisation is located in.
- Select the **Organisations** tab
- Next click the appropriate **organisation name** under approved organisations and the organisation record details will be displayed.
- Select the **Staff** tab.
- Staff members can then be added to the group in the following ways:
  - **Add existing site members to this organisation**  
This task allows you to add a user record that already exists on your site. This should be used if the user already exists.
  - **Add a new member to this organisation**  
This task allows you to create a new user directly within your organisation. The user won't have access to login unless you check the Editor permission. This permission will send the user their login credentials.

**Editor?** Selecting the Editor permission for a staff member will grant them access to modify the details of their organisation. The user can then modify their organisation's details through the **My Organisations** area located under My Area

## Displaying a Directory

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Once you have created a directory and have added organisations, then the directory group will appear on the site. You won't however be able to view the organisation details listing until you add a Directory component to the group's layout. To edit the directory layout please refer to the Themes and layouts QuickStart Guide. Note these specific Directory component settings:

- **Where's my nearest?** – If this option is selected an additional search option is added that allows the user to find the nearest organisation listed in the Directory to the specified postal code. The nearest organisations are ordered by distance from the entered postal code; clicking on one of the organisations listed will then display their full details.
- **Include Map** – If this option is selected then organisations will be plotted on a zoomable map, according to their postal code.

## Creating sub-directories

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Often a Directory can be separated into smaller directories, just like user groups can be split into several sub-groups. For example if you had a directory of churches you may categorise them by denomination or geographically. This can be achieved by creating a sub-directory as follows:

- Click the **Organisations** tab
- Click the **Advanced Options** link at the bottom of this area.
- Click the  **Create a sub-directory below** *directoryname* task.
- Enter a name for your new sub-directory e.g. 'Baptist' and click the **Create Group** button; you will be re-directed to the **Summary** tab of your newly created **Directory**.

Once the sub-directory has been created you can now add existing organisations to it. This can be done in 2 ways as explained below:

- **Add many organisations to a single directory group** - Through the 'Add another organisation to the *directoryname* directory' task many organisations can be added at once.
- **Add an individual organisation to several sub-directories** – Through the 'Classification' tab on an organisation record you can edit the Directories an organisation belongs to.

## Adding Group-Notes to a Directory

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Sometimes you may wish to store additional information about an organisation outside of the standard fields. If it can't be achieved by grouping the organisations within a sub-directory, as described above, it can be achieved instead by adding custom fields called group-notes. A group-note can be added as follows:

- Select the **Organisations** tab.
- Click the '**Change the structure of group notes stored for the** *Directoryname* **directory**' task.
- To add a new field select the '**Add another field to the Directory group.**' task. Any existing group-notes shared within the Directory will be listed; before you begin to add another field to the database, you will be asked to check that the field does not exist elsewhere already. Keeping the information in your database accurate and simple is very important to making the most of **churchinsight**; this step is designed to prevent duplication and so you should check carefully before proceeding. If you do find a field with the same purpose already in the list click the **[show]** link in the **owners** column to find out who has the necessary privileges to share the information with you.

If you are confident that the field does not exist elsewhere click **the data is not already present** option and select the **OK** button to proceed. The **field properties** window will be displayed shortly afterwards.

- Enter the details of the new global field, here's an explanation of the fields:  
**Field user type** – Set to **Organisation** to add a field that relates to an organisation, and **Staff Role** if it relates to an organisation's Staff members.

**Field data type** - Set to appropriate field type. e.g. **Date** . Cannot be changed once data has been added.

**Sensitive field** – Only visible in the Web Office to those with the Sensitive Group-Note permission

**Can be updated by editors of organisations** – Select this option if you would like the user to be able to edit the details themselves. If selected the field will also automatically appear on the Organisation Registration page.

**Mandatory on user-side** – Forces the user to fill in this field. Only available if the field is editable by the user (see update by editors option above).

**Visible via directory listing** – If selected this field will display in this field in the Directory listing.

**Text options** – Depending on the field type selected different validation options will appear, which force the user to enter data in the required format.


Click the **Add new note** button to complete the process. The list of fields in the **field editor** window will be updated shortly afterwards.

## Linking an Organisation to a Group

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If you wish to display the same rich information you can in a normal group e.g. Events, Rotas etc, for an organisation, this can be achieved by linking your organisation to a group.

You could for example list your small groups in an organisation directory to use the 'Find my nearest' search feature, enabling user's to easily locate the nearest small group to them. Once they select a small group from the list this could link directly to a *User* group for the small group that displays articles, events, rotas etc. You can link an organisation in a Directory to a group as follows:

- Click the **web office** link to enter the web office administration area.
- Select the  **Directory folder** that you would like to add an organisation to.
- Click the **Organisations** tab.
- Next click the appropriate **organisation name** under approved organisations and the organisation record details will be displayed.
- Under the **Details** tab, next to the *More Details Group Link* select the group you wish your organisation to link to.
- Select **Save and Exit** , your organisation should now link directly to the appropriate group.