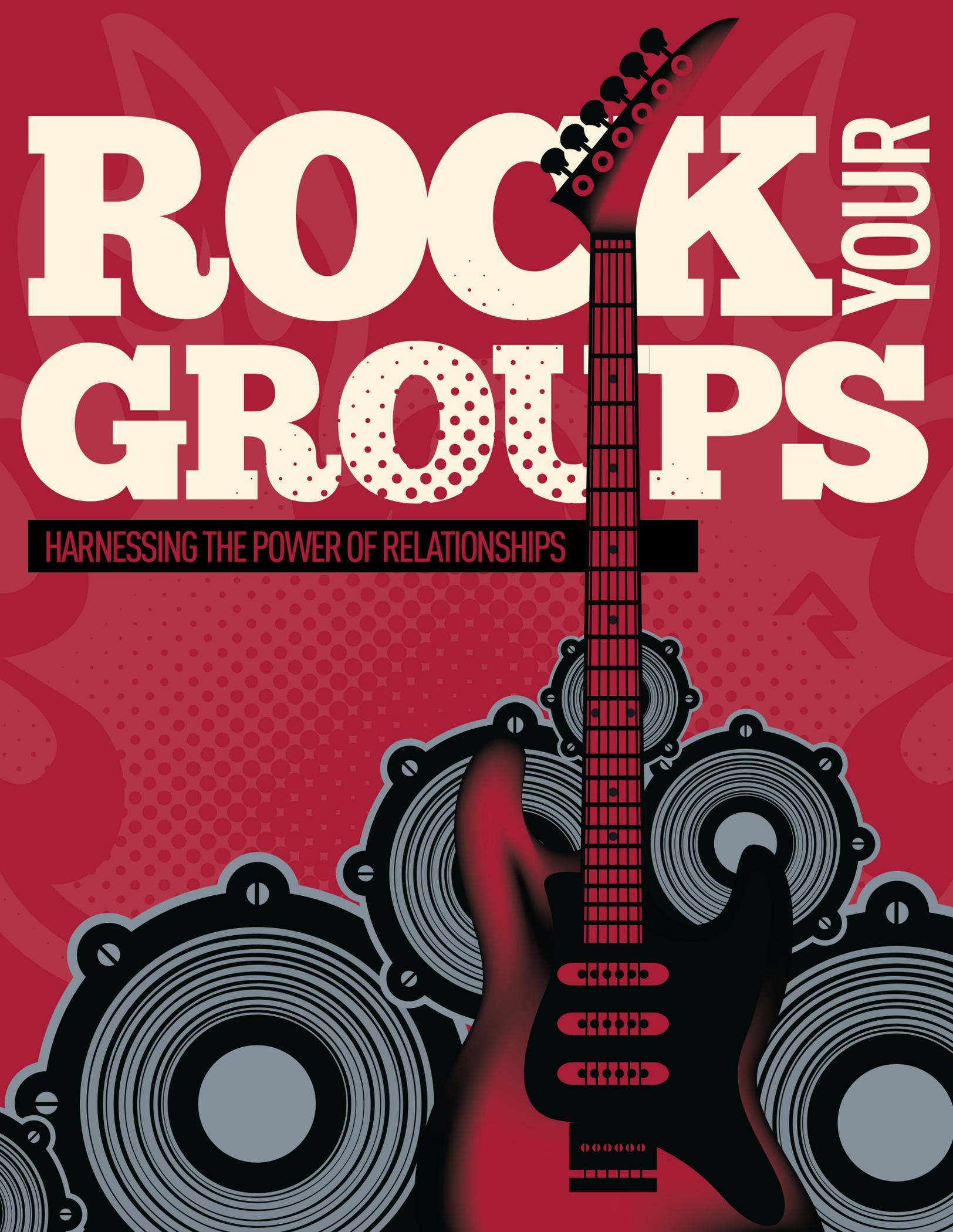


# ROCK YOUR GROUPS

HARNESSING THE POWER OF RELATIONSHIPS



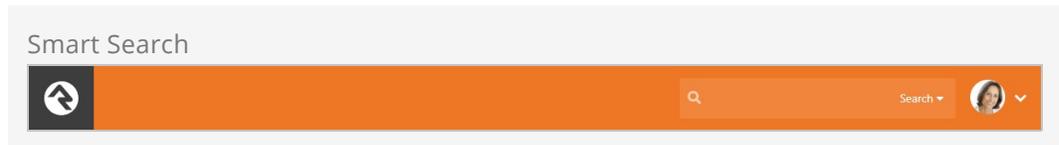
# Overview

Groups are used whenever two or more are gathered. You'll find groups to be simple but incredibly powerful. Rock comes pre-configured with the following types of groups:

- **Families:** Each family is stored as a group. This is incredibly powerful because families get the same power and functionality as any other Group Type. In the beginning you'll want to leave families configured just the way you found them. As you create new Group Types and gain more experience with groups, keep in mind that you can add new attributes and additional functionality to the family Group Type.
- **Security Roles:** These groups help secure Rock data. While you'll use these groups a majority of the time for security, you'll soon discover that any group in Rock can act as a security role.
- **Check-in Groups:** Rock's check-in features use groups to store the locations where kids can check in and to track attendance.
- **Serving Teams:** While we have big ideas for how serving teams will work in the future, we have configured a simple group type to get you started with tracking your groups.
- **General Groups:** It's likely that you'll be creating several groups that don't warrant their own specific group type. In these cases feel free to create them as 'General Groups'.
- **Application Groups:** Rock needs to keep track of various lists of people. For instance people who have opted out of getting future photo requests. These 'lists of people' are stored as Application Groups. Application groups can be viewed/managed under `Admin Tools > System Settings > Application Groups`.
- **Small Groups:** We've added a generic Small Group group type. Feel free to use this as a base to build from if your church has a groups ministry.
- **Small Group Sections:** This group type works in conjunction with the Small Group type and acts as a leadership level to provide hierarchy for your groups. Again, feel free to use this type as a launching point for getting started.

# Searching for Groups

As you add more and more groups to Rock, it may be tedious to locate a specific group. Never fear, you can use the `Smart Search` at the top of each page to help find the specific group you are looking for.



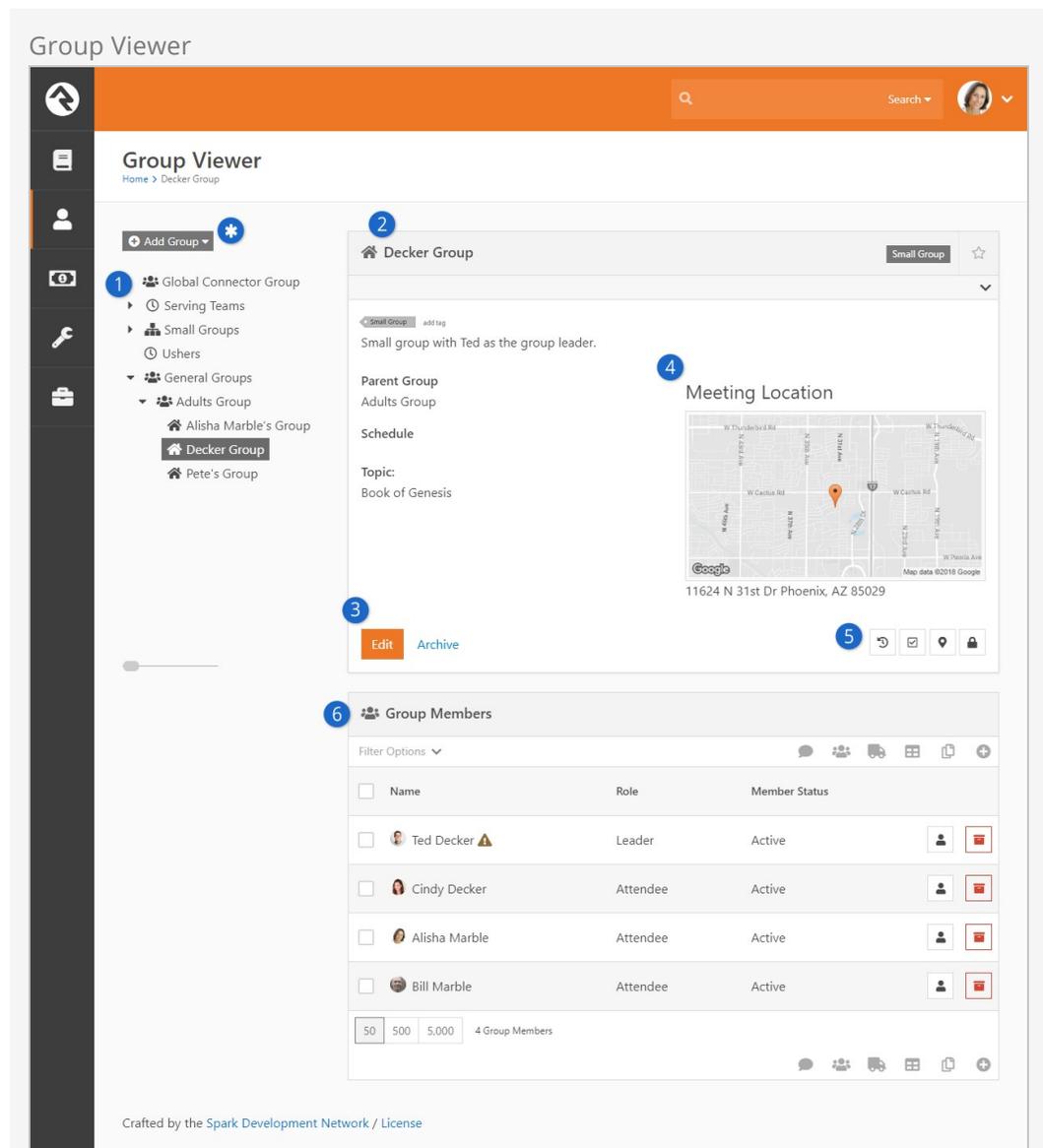
Be sure to choose the *Group Name* option from the drop down and then enter the group name you are searching for. You don't need to enter the full group name, since the search will return any group that has the search term you entered. Say you were looking for the Bible Study group that Ted Decker leads (named "Ted Decker's Bible Study Group"). Any of the searches below would be valid, although some may return several other groups in the results, as well.

Decker  
Bible Study  
Ted Deck

If the search term you provide only matches a single group, you will be taken directly to that group. However, if several groups match, you will have to select one from the list of groups provided.

# Group Viewer

The group view `People > Group Viewer` is the primary window for viewing and editing groups. Below, we will discuss each section of the group viewer in detail.



## 1 Group Tree

This control allows you to drill down through your group hierarchies. You'll want to plan your hierarchies to achieve a good balanced approach.

Too deep of a hierarchy will lead to too many clicks to drill down. However, if your hierarchy is too broad, then you will have to scan through long lists of groups to find the one you want.

**2 Group Details**

Displays information about the group including adding tags.

**3 Action Bar**

Options to edit or delete a group.

**4 Group Maps**

The viewer will display maps for each group location that is able to be mapped. You can click on the map to see a larger interactive map. You can also click on the map marker button directly below the maps to see the interactive map.

**5 Actions**

Below the maps you'll find buttons for a few key actions.

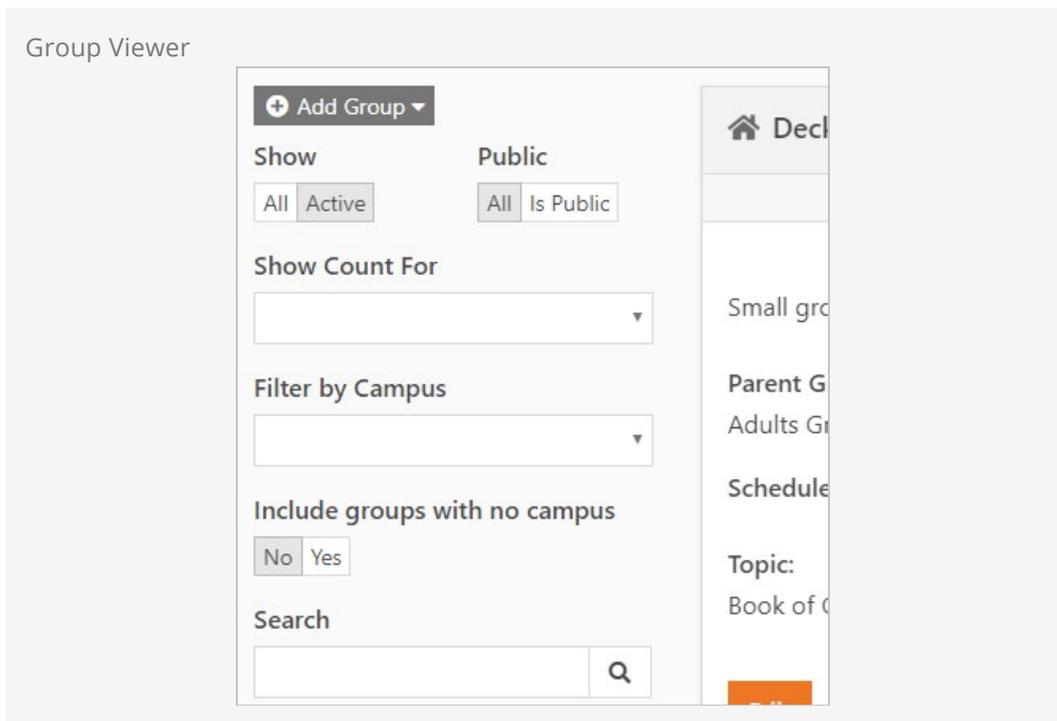
- Allows you to manually enter in attendance for the group.
-  Takes to you an interactive map where you can view all the people who are members of the group.
-  Using the security button you can control who has access to view and edit this specific group. See the [Securing Groups](#) section below for more information on how you can secure your groups.

**6 Group Members**

List of member inside the group.

The group view has a couple of other interesting features you should be aware of.

Notice the  icon next to the asterisk call out in the figure above. This gear only shows when you hover near the area. Clicking it will show you several advanced features in the tree view. Let's open it up and see what's inside:



You'll notice:

- **Show** This determines if inactive groups should be shown.
- **Show Count For** The tree can also display counts of the number of members in the group or the number of child groups a group has.

### Archived Groups

When a group has been marked as Archived and you want to bring it back go to:

[Admin Tools > General Settings > Archived Groups](#) Click on the  icon to unarchive the group.

## Group Maps

Clicking the map marker button will take you to an interactive group map showing the members of the group. Depending on the configuration of the group other features may be enabled.

If the group has a geopoint (determined through the address geocoding process or by selecting the point on the map) the location of the group will also be present on the map.

If the group has a defined geofence this fence will be shown on the map. The presence of the geofence will also enable the display of connection status checkboxes at the top of the map. Checking these boxes will show everyone with that connection status in the database who lives within the geofence. This allows you to view possible 'prospect' group members.

## Limiting The Display of Certain Connection Statuses

In order for a connection status to be displayed as a checkbox the status must be configured with a 'Color' attribute. This helps determine the pin color for the map marker as well as acts as a global setting to help determine which connection statuses should be mapped. You can set the color for a connection status under

`Admin Tools > General Settings > Defined Types > Connection Status`.

Group Map

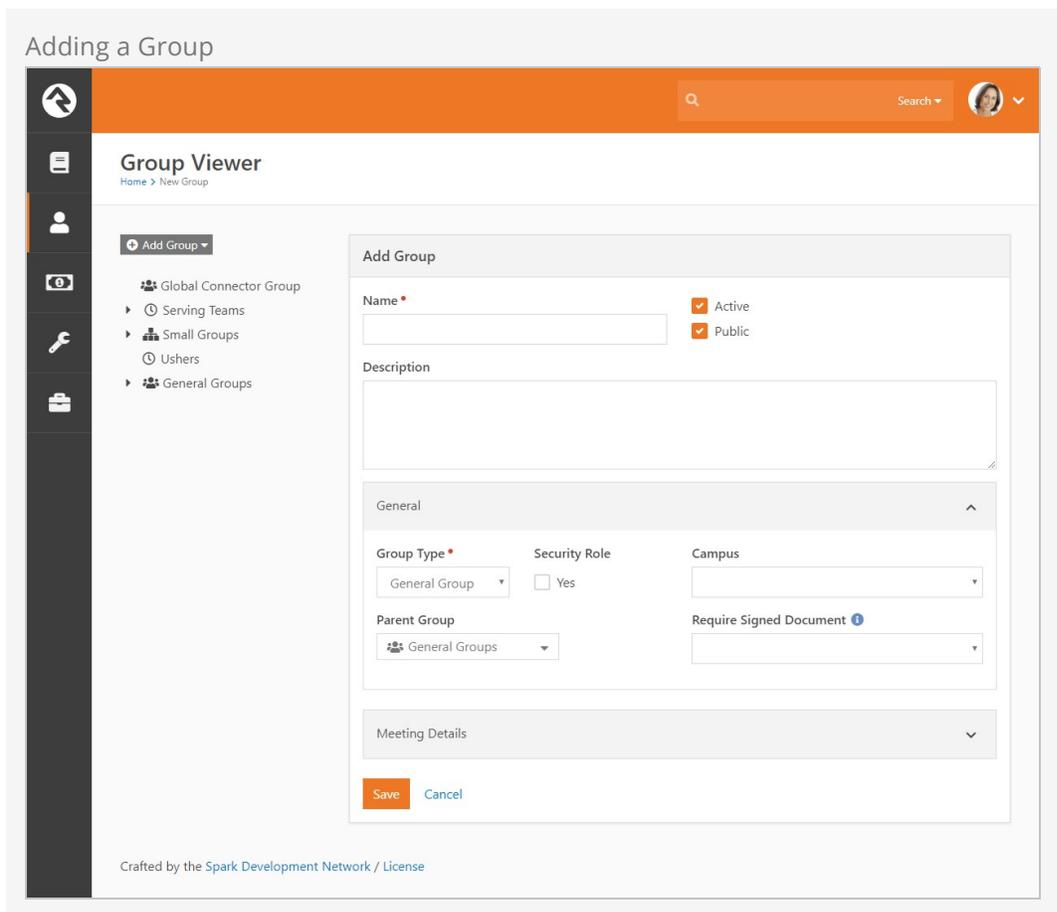
The screenshot shows a web-based map interface. At the top, there's a navigation bar with a search icon and a user profile icon. Below that, the title 'Group Map' is displayed, followed by a breadcrumb trail: 'Home > Alisha Marble's Group > Group Map'. The main area is a map of a residential neighborhood with various streets labeled, such as W Rosewood Ave, W Larkspur Dr, W Columbine Dr, W Bloomfield Rd, W Charter Oak Rd, W Weathersfield Rd, W Cactus Rd, W Shaw Butte Dr, W Paradise Dr, W Laurel Ln, W Polinsettia Dr, W Sunnyside Ave, W Altadena Ave, W Sierra St, W Lupine Ave, W Cholla St, W Larkspur Dr, W Columbine Dr, W Bloomfield Rd, W Charter Oak Rd, W Weathersfield Rd, W Cactus Rd, W Shaw Butte Dr, W Paradise Dr, W Laurel Ln, W Sunnyside Dr, W Altadena Ave, W Lupine Ave, W Cholla St, W Larkspur Dr, W Columbine Dr, W Bloomfield Rd, W Charter Oak Rd, W Weathersfield Rd, W Cactus Rd, W Shaw Butte Dr, W Paradise Dr, W Laurel Ln, W Sunnyside Dr, W Altadena Ave, W Lupine Ave, W Cholla St. A legend in the top left of the map area shows an orange circle for 'Alisha Marble's Group' and a green circle for 'Group Members'. A map marker is visible on the map. The map is credited to 'Crafted by the Spark Development Network / License'.

## Adding a Group

You can add a new group to the tree by clicking the `Add Group` dropdown and then selecting the location from the list. Adding a group to the *Top-Level* will place the group at the root or top of the tree. Selecting `child to selected` will place the group under the currently selected group.

### Note

If you have a group selected but `Add Child to Selected` is disabled, then this group type does not allow child groups. See the *Group Types* section below for more on group hierarchies.

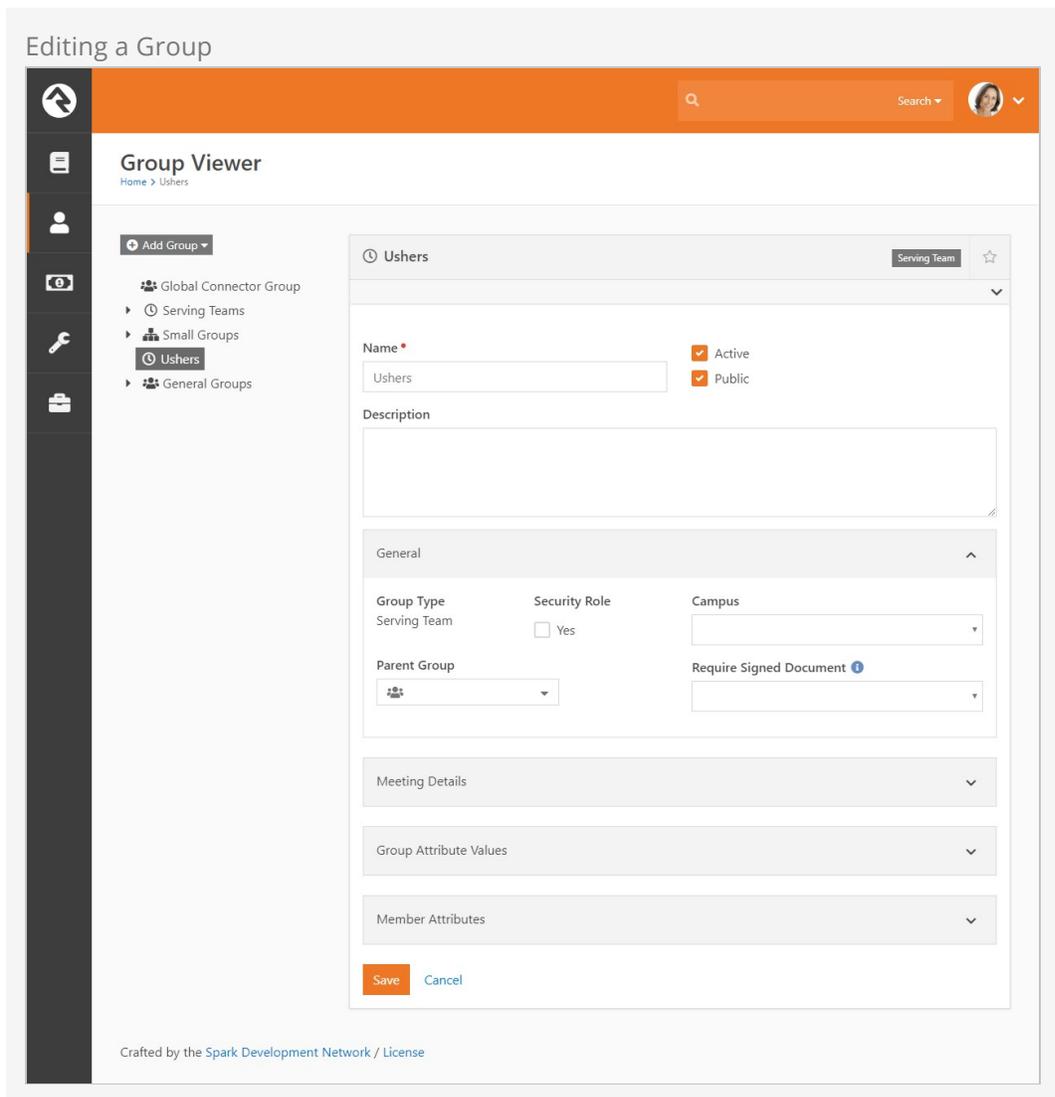


## Group Details

The group details section displays all of the information about the group. The group type and campus (if configured) will be shown as labels in the banner at the top. A map of the group's location will also be shown, if configured.

## Editing a Group

Clicking the `Edit` button from the detail section will allow you to edit information about the group and provide additional configuration settings. From here you can also change the group name and set whether a group should be active or inactive. If you mark a group inactive you also change the active status of all child groups to inactive as well. Each area of the edit screen is discussed below.



## General

- **Group Type:** Changing the group type of an existing group is possible, but it does have some consequences. All group attribute data for the group will be lost if the group type is changed.
- **Parent Group:** This will move the group to a new parent in the hierarchy. Removing a parent group will move the group to the root or top of the tree.
- **Campus:** Providing an optional campus will link the group to a specific campus.
- **Security Role:** This option will enable the group to operate as a security role. The members of the group will be granted access to whatever privileges the group is granted.
- **Require Signed Document:** This setting determines if the members of the group require a signed document/waiver to be in the group. Rock can automate the sending of requests to get digital signatures after each registration. We cover this topic in detail in the [Admin Hero Guide](#).

### Meeting Details

This area allows you to add locations and times based on the configuration provided through the group type.

### Group Attributes Values

Any group attributes values added by the group type will be available here for editing.

### Member Attributes

In this area, you can configure attributes to be assigned to each member of the group. These attributes will be available for edit when adding or editing group members.

### Group Member Workflows

This section allows you to configure workflows that will be launched when specific events occur with group members.

#### [More Information Below](#)

You may notice that we skipped over a few sections above. Additional information on these sections will be covered below.

# Group Types

As you start to customize Rock for your ministry, you'll want to define new group types to match your various ministry areas (small groups, ministry groups, etc.)

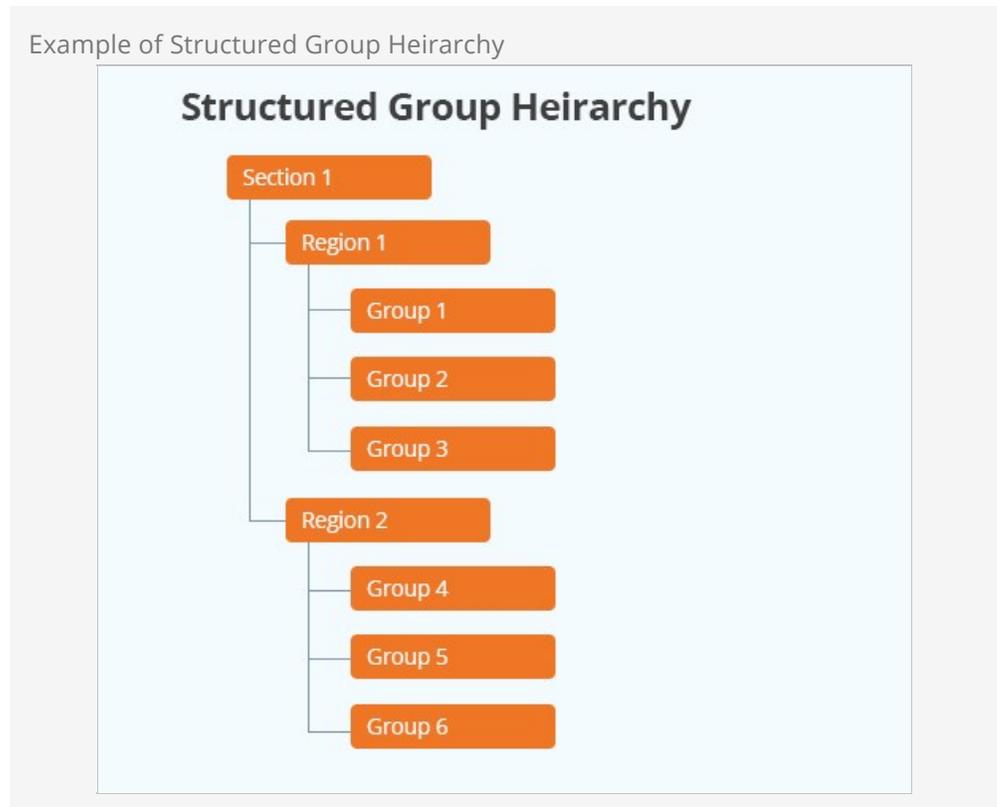
## Tip:

Once you realize the power of group types, you'll be tempted to start creating many custom types to fit each of your ministries. Don't do it! Resist this temptation at first. Less is more. Look for common points within your many ministries. This will help you reduce the number of group types that you'll need. In general, it's easier to add new group types later than it is to merge group types in the future.

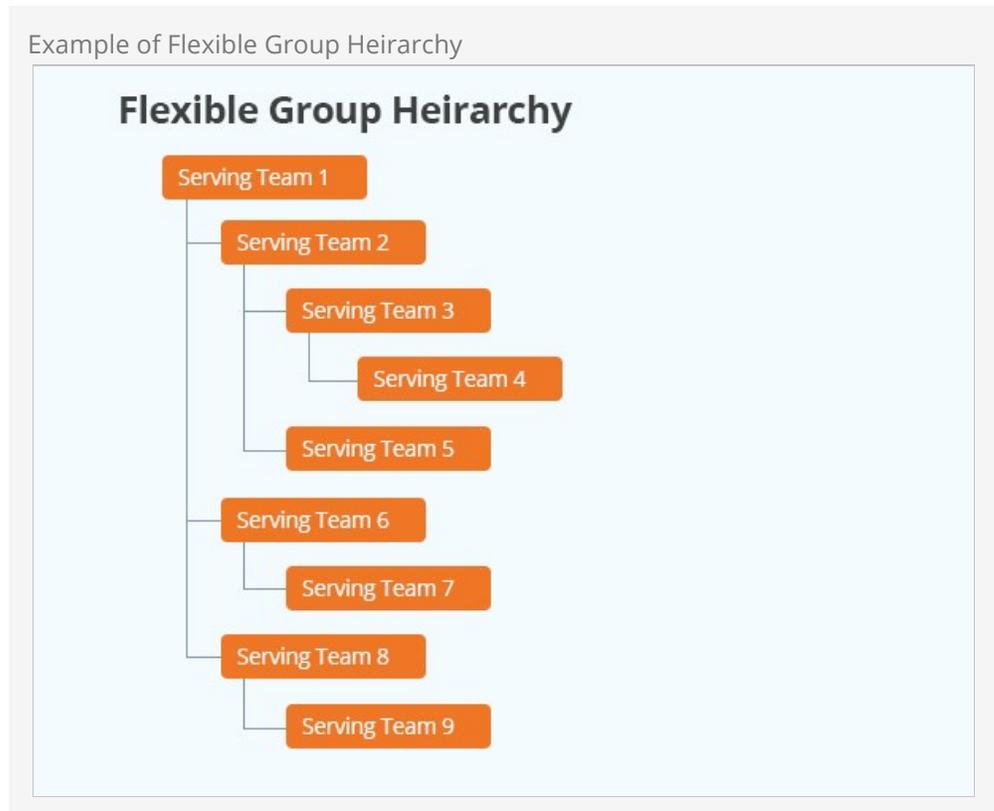
## Group Hierarchy

One of the most important concepts to understand as you create new group types is the relationship that groups have to each other. There are two basic hierarchy types to choose from:

- **Structured Hierarchy:** In this configuration, the levels of hierarchy are defined and limited. For example, you may want to define the hierarchy of your small group ministry to have a single leadership team, under them a level of lay leaders who act as coaches to the groups, and then the groups themselves. In a structured hierarchy you can be sure that this structure is enforced.



- **Flexible Hierarchy:** For some ministry types, you want your groups to have a more unstructured hierarchy. An example of this might be how you set up serving teams. You may want serving teams to be able to have sub-teams that might have additional sub-teams themselves. These hierarchies may be very deep in some ministry areas (like First Impressions) but shallow in others.

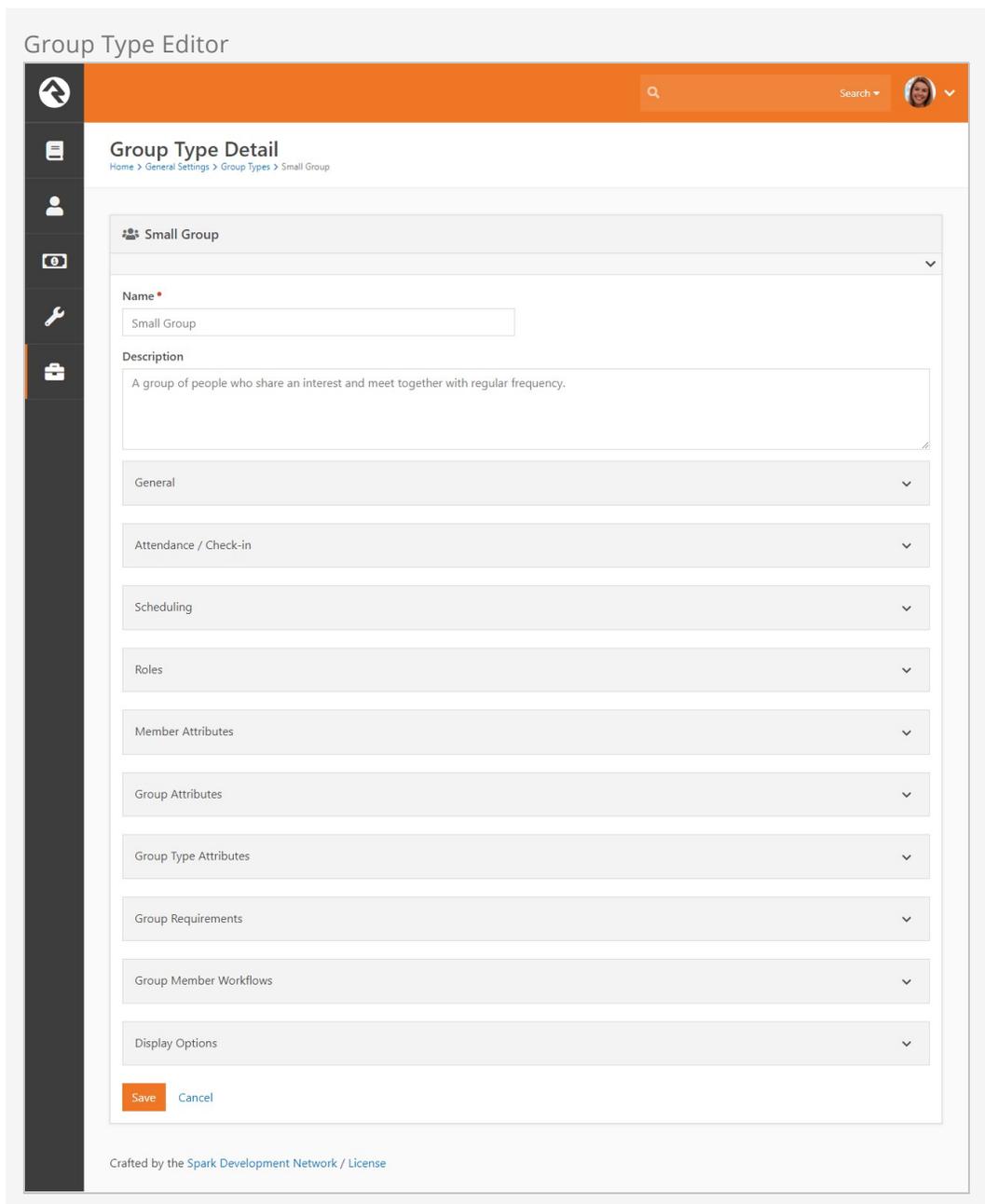


You define these hierarchies by configuring what child groups each group type can have. In the structured example, you would create a group type called *Small Group Leadership*, which would allow child group types of *Group Coaches*, which would allow child groups of *Small Groups*. The *Small Groups* would not allow any child types, ensuring that your hierarchy was fixed at the third level.

In the flexible hierarchy example, you would configure *Serving Teams* to have child-types of itself. This guarantees that you can have an unlimited hierarchy.

## Administering Group Types

You administrate group types under `Admin Tools > General Settings > Group Types`. When adding or modifying a group type, you can provide the following types of configuration:



Let's look at the different Group Types settings you can configure in the *Group Type Detail* block.

### Show/Hide Group Type Settings

The following Group Type settings, located in the General section of the *Group Type Detail* block, control which panels and options should be shown or hidden in that block.

Setting	Description
Allow Specific Group Member Attributes	Determines if specific groups are allowed to have their own group member attributes. If selected, the Member Attributes section will be shown.
Enable	Determines if the Group Requirements section will be shown on the

Setting	Description
Specific Group Requirements	<i>Group Details</i> block.
Allow Group Sync	Determines if groups of this type are allowed have Group Syncs. This will show/hide the Group Sync Settings section. If a group of this type already has group syncs, they will be kept. Unchecking this box will <b>not</b> prevent them from running.
Allow Specific Group Member Workflows	Determines if groups of this type should be allowed to have Group Member Workflows. If selected, the Group Member Workflows section will be shown.

#### Common Group Type Settings

Setting	Description	Example
Group Term	This is what Rock will use to describe the group on the various screens.	Group, Family, Event, Team
Group Member Term	This is what Rock will use to describe the people in the groups on the various screens.	Member, Individual, Participant
Roles	Roles describe the relationship of the individual to the group. Are they a leader? Or just a member?	Leader, Member, Prospect
Default Group Role	The default role to use when someone is added to the group.	Selection of one of the roles defined to the group.
Child Group Types	As we discussed above, child group types help determine the hierarchy of the group tree. This tells Rock what kind of groups can be added as children of the current group.	Serving Teams may allow Child Serving Teams
Location Types	The types of locations that can be assigned to the group.	Meeting Location
Location Selection Mode	Determines how locations should be selected in Location Picker.	The following options are available: <ul style="list-style-type: none"> <li>• Named - Allows you to pick from named locations that have been defined under <a href="#">Admin Tools &gt;</a></li> </ul>

Setting	Description	Example
		<p><a href="#">General Settings &gt; Named Locations</a></p> <ul style="list-style-type: none"> <li>● Address - Allows the input of a new street address for the location.</li> <li>● Point - Displays a map that allows for the selection of a specific latitude/longitude point.</li> <li>● Geo-fence - Also displays a map that allows for drawing a polygon shape to use as a geo-fence.</li> <li>● Group Member Address - Lists all of the addresses associated to the group members of the group. Note that if the address of the group member changes the meeting location will not be automatically updated to this new address.</li> </ul>
Multiple Locations	Determines if the group can have multiple locations.	True/False
Group Attributes	The custom attributes that each group will have.	Meeting Day, Meeting Time, Topic of Study
Group Member Attributes	The custom attributes that each group member will have.	Hours Per Week Serving, Assigned Bus
Group Capacity Rule	Rock allows you to set individual capacities for groups. This configuration setting determines how the capacity should be enforced.	<p>The following options are available:</p> <ul style="list-style-type: none"> <li>● None - This disables the group capacity features.</li> <li>● Hard - This places a hard limit on the capacity. Once the capacity is reached no additional group members can be added.</li> <li>● Soft - The soft option will warning you when adding a member that is over the groups capacity but still allows you to add them.</li> </ul>
Groups Require Campus	This setting will require that all groups of this type have a campus when adding and editing.	True/False
Show Administrator	This setting determines if groups of this type support assigning an administrator for each group.	Check Yes or leave blank
Administrator	This setting allows you to	Administrator, Coordinator, Director

Setting	Description	Example
Term	customize the term used for the administrator of the group.	
Enable Group Tag	This determines if tags are allowed for the group	Check Yes or leave blank

#### Attendance and Check-in Settings

Setting	Description	Example
Takes Attendance	Determines if the group takes attendance. This will help to enable check-in and metrics features.	True/False
Weekend Service	Determines if attendance for this group should be counted towards attending a weekend service. For example the attendance badge on person profile will only consider attendance to groups with this value enabled.	True/False
Group Scheduling Options	This setting is used when you want to configure a schedule for the groups of this type. The schedule is used for features like group attendance and group member scheduling. The options you select here help determine the types of schedule that can be configured for the groups.	<p>Schedule type options include:</p> <ul style="list-style-type: none"> <li>• Weekly: This options allows a simple weekly schedule to be selected. When configuring a group one only needs to select the day of the week the group meets and the start time. We highly recommend that you use this setting as it is the only schedule option that is usable as a filter in the group finder.</li> <li>• Custom: With this option enabled each group can select its own repeating schedule. This option allow for the most power and flexibility, but when used the schedule created can't be used as a filter in the group finder.</li> <li>• Named: The named option allows you to pick the group's schedule from a list of preconfigured schedules. These schedules are configured under <a href="#">Admin Tools &gt; General Settings &gt; Schedules</a>. Like the <i>Custom</i> option this</li> </ul>

Setting	Description	Example
		setting can't be used as a filter in the group finder.
Schedule Exclusions	This setting allows you to define a set of date ranges when all of the groups of this type will not meet regardless of the specific group schedules. This allows you to easily configure breaks and holidays without having to edit each groups schedule.	Set of date ranges when groups of this type will not meet.
Attendance Rule	Determines how check-in will work if the person is not already in the group.	Add on Check-in (adds the person to the group if they are not already in the group), Already Belongs (the individual must already belong to the group)
Group Attendance Requires Location	This option will require that all attendance occurrences have a location.	True/False
Group Attendance Requires Schedule	This option will require that all attendance occurrences have a schedule.	True/False

### Advanced Group Type Settings

These settings will be rarely used, but it's helpful to know they exist as you define your group types.

Setting	Description	Example
Purpose	The purpose helps categorize different group types together. This allows you the flexibility of creating multiple group types but at the same time providing a way of 'linking' these various types together with a single 'purpose'. To add a new purpose simply add a new <i>Defined Value</i> under <a href="#">Admin Tools &gt; General Settings Defined Values &gt; Group Type Purpose</a> .	While we recommend that you start with a single group type to manage your various serving teams you could over time add new ones. You would then create a purpose to describe them all as serving opportunities.
Group Type Attributes	Custom attributes that will be shared by every group of this type. In other words every group of this type will have the same	Group Type Attributes are used by the check-in system. Most group types won't have a need for them.

Setting	Description	Example
	value of these attributes.	
Attendance Prints To	<p>Determines the device / location where check-in labels will be printed. The options are:</p> <ul style="list-style-type: none"> <li>• Default - Uses the print location configured in the check-in workflow.</li> <li>• Kiosk - Overrides the check-in workflow to always print at the check-in kiosk.</li> <li>• Location - Overrides the check-in workflow to always print at the location configured in the group.</li> </ul>	This setting will have limited value outside of configuring check-ins.
Inherited Group Type	This allows you to create a group that inherits its attributes from another group type. This is helpful when you have two group types that are very similar but one needs a few more attributes.	Say you have a <i>Serving Team</i> group type that covers most of your serving groups. Your worship teams, however, would like to add a special attribute for <i>Instruments Played</i> . You want this new group type to have all of the same attributes of the current <i>Serving Team</i> . To solve this, add the <i>Serving Team</i> group type as the <i>Inherited Group Type</i> of the new <i>Worship Serving Team</i> group type.
Show Connection Status	This allows you to show a person's connection status in a column on group member lists.	This comes in handy for trying to understand a person's connection to your organisation at a glance.
Show Marital Status	This allows you to show a person's marital status in a column on group member lists.	This comes in handy for quickly viewing a person's marital status.

## Group Member Roles

People often have special roles in groups. Some are leaders; others have unique duties. To help differentiate the members of a group, you can give each a Group Member Role. The list of possible roles are defined on the group type. For more information on the roles available, you can check out the chapter on Group Members.

# Securing Groups

Most groups you create will need to have some level of security added to them. They may or may not contain the world's secrets, but you'll want to control who can add, edit and/or delete them at the very least.

## Securing Group Types

By adding security to a group type, you control the base security of every group of that type. Let's say your organization adds a new type of group to help manage some classes you're starting. You may want to create a new group type for this initiative where every class is a group of this new type. By adding security to the group type, you can ensure that every group can be viewed and edited by a select handful of people.

To add security to a group type, go to [Admin Tools > General Settings > Group Types](#). There you will see a list of group types in a table. In the far right column you will see an  button. Clicking this will allow you to set the security for the selected group type.

## Securing A Group

There may be occasions where each group will need different security settings. Don't worry, this is super easy in Rock. To secure a specific group, find the group in the group viewer ([People > Group Viewer](#)). On the group details page you'll find the same  button. Clicking this button will bring up the Rock security dialog where you can adjust the security settings. Anyone with permission to edit security roles also has access to the *Manage Members* tab, where they can add, edit and delete group members (but not edit or delete the group itself).

Note the inherited permissions at the bottom of this screen. Inherited security is a very powerful concept with groups. By default, a group will inherit the security of its parent groups and group type. This limits the amount of security configuration each group requires. These inherited rights are only a starting point. You can either build on top of these permissions or override them. The choice, and power, is up to you.

At first you may be tempted to go overboard with your group's security settings. In general it's best to keep them simple. For instance, in the case of home-based Bible studies you may be tempted to secure each group differently to only allow the leader to edit them. While in certain cases you may need to do this, you could also secure all groups with a generic *Small Group Leader* role. You could then limit which groups a leader was able to navigate to through the configuration of your leader toolbox blocks.

## Group Member Roles

Group member roles play an important role in how groups are secured. Each role can be configured to provide *View* and / or *Edit* rights. This is configured under [Admin Tools](#)

> [General Settings](#) > [Group Types](#) .

## Inherited Permissions

When determining the security of a group it's important to consider not only the specific permissions of the group but also the inherited permission rules. The inheritance rules for groups is:

Current Group > Group Type Security > Parent Group Security > (continue up the hierarchy till it reaches the root group) > Group EntityType Security > Global Default.

The primary inheritance rules come from the group's hierarchy but the system has a built in 'choke point' check on the security of the group type first. Why is this? Adding a quick check of the group types security allows specific types of groups to have unique security considerations. Take for example a group type for 'Addiction Classes'. Adding a check for the group types security allows a way for limiting visibility to these groups without having to worry about inconsistencies in the security of the group hierarchy. In most cases the group type will not have specific security so this check will not matter, but it's there if you need it.

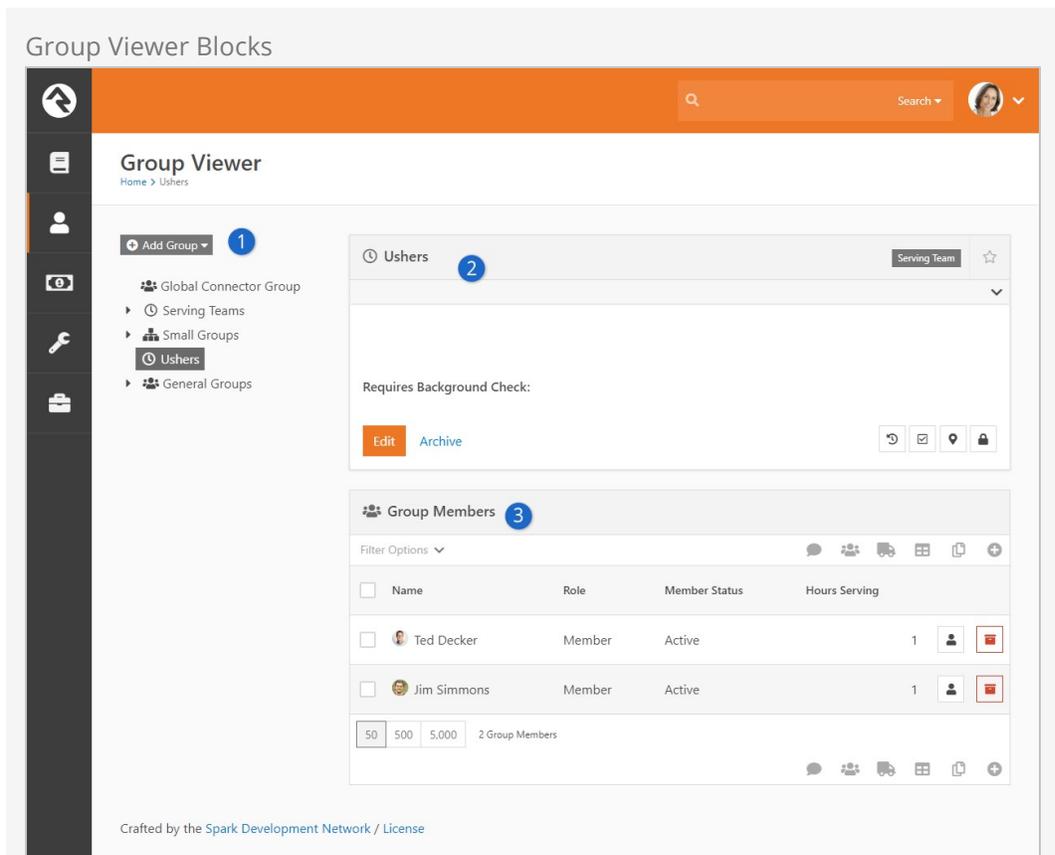
If when checking the group's security the person is blocked access there's still one last check to be done. Roles defined on the group type can be configured to provide access to the group. For instance you can configure the leader of a group to have view/edit rights to that group. Likewise the member of a group could be setup to have view access. This allows a very simple and flexible way of providing access to external individuals.

# Group Strategies

The flexibility built into Rock groups is very powerful. But like a puzzle when you open the box and dump out the pieces, it can be a little overwhelming to get started. Below are a few strategies for you to consider first. Don't be afraid to ask others how they have configured their groups. The Ask section of the Rock website is perfect for these kinds of discussions.

## Multiple Group Viewers

Rock comes preconfigured with a general group viewer `People > Group Viewer`, but you can add more. Say, for instance, your church has a strong small group ministry. You may want to create a new *Group Viewer* page just for this ministry. You can do this by adding a new page under *People* (or any other page you like) and add the group viewer blocks to the page.



The following blocks are used to make a group viewer. We recommend that you use the *LeftSidebar Panel* page layout.

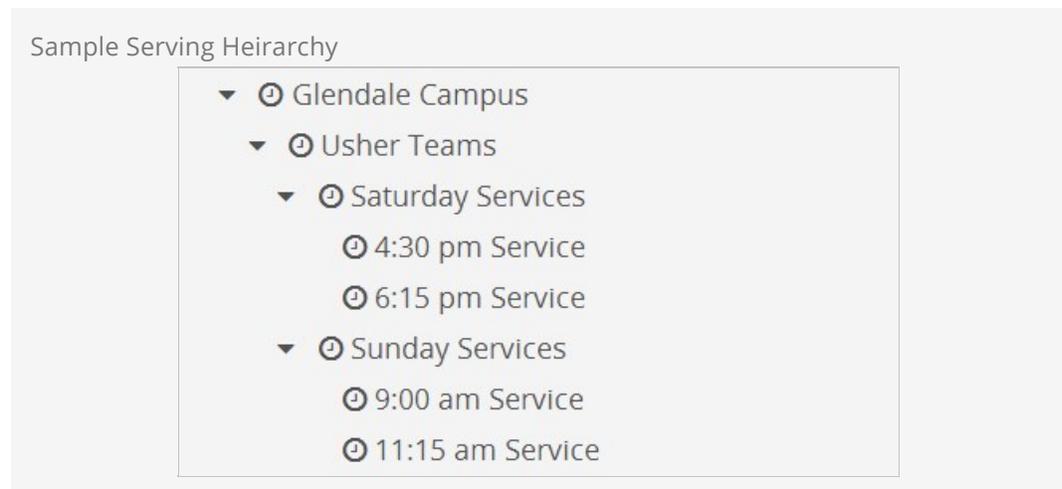
- 1 Group Tree View**  
Add a group tree view block to the sidebar zone to help you navigate your group heirarchy.
- 2 Group Details**  
Add the group details block to the top of the main zone.
- 3 Group Member List**  
Next add the group member list block under the group details.

When you set up the *Group Tree Block* you can set the root group to start with and limit which types of groups it will display. This allows you to make a very specific small groups viewer with just a couple of clicks.

## Group Folders

As you start to think about your group hierarchies, make sure that you plan for growth. This might mean that you create special groups in your hierarchy to help to categorize your groups. You can think of this like using folders on your computer to help manage all of your files. You could throw all of your files in one folder, but you'd never find anything. Adding folders helps you arrange and sort your groups. While folders add little value to your computer's file-system, these *category groups* can actually be beneficial beyond just organizing. For instance, if you add these category groups to your

serving teams, the categories can act as leadership teams for their sub-groups. Take a look at this example of the first impressions serving teams at a large multi-campus church:



Notice how each campus and ministry area has a leadership group. These groups not only help arrange the serving teams, but they can also have members of their own that represent the leadership team for each area.

# Group Schedules

Let's take a brief moment to see the various scheduling options for groups and how these settings affect the features available.

## Types of Group Schedules

There are three types of group schedules that can be configured for a group. To help simplify the editing of a group we allow you to configure which of these options are available to groups of each particular type. For instance, you'll probably want to configure your *Small Groups* to only be configured to allow the *Weekly* schedule. You can select which of these options are available for a specific group type under [Admin](#)

[Tools](#) > [General Settings](#) > [Group Types](#)

### Weekly

This option allows a simple weekly schedule to be selected. When configuring a group, one only needs to select the day of the week the group meets and the start time. We highly recommend that you use this setting because it is the only schedule option that is usable as a filter in the group finder. For example, if you set your small groups to the *Weekly* schedule option, your website visitors can find groups that meet on a specific day of the week that's convenient for them.

### Custom

With this option enabled, each group can select its own repeating schedule. This option allows for the most power and flexibility, but the schedule created can't be used as a filter in the group finder.

### Named

The named option allows you to pick the group's schedule from a list of preconfigured schedules. These schedules are configured under [Admin Tools](#) > [General Settings](#) > [Schedules](#). Like the Custom option, this setting can't be used as a filter in the group finder.

## Schedule Exclusions

Picture this: you've just finished entering all of your small groups into the system with their correct schedules and your supervisor just announced that, "groups are taking a two-week break." Not a problem! Adding a *Schedule Exclusion* to the *Small Group* group type will add the exclusion(s) to the schedule of all groups of this type. This is done under [Admin Tools](#) > [General Settings](#) > [Group Types](#). This not only keeps the schedule

accurate it also keeps attendance reminders from being sent while groups are not meeting.

# Group Attendance

Whether you're following the leadership principle of *inspect what you expect* or you simply want to keep a pulse on the health of a group, the group attendance feature can simplify the process of gathering participation details of your group members.

## Configuring a Group for Attendance

Before a group can take attendance, its group type must first be configured to enable attendance tracking under [Admin Tools > General Settings > Group Types](#). From here you should select the group type you'd like to configure check-in for. Under the *General* tab enable setting *Takes Attendance*.

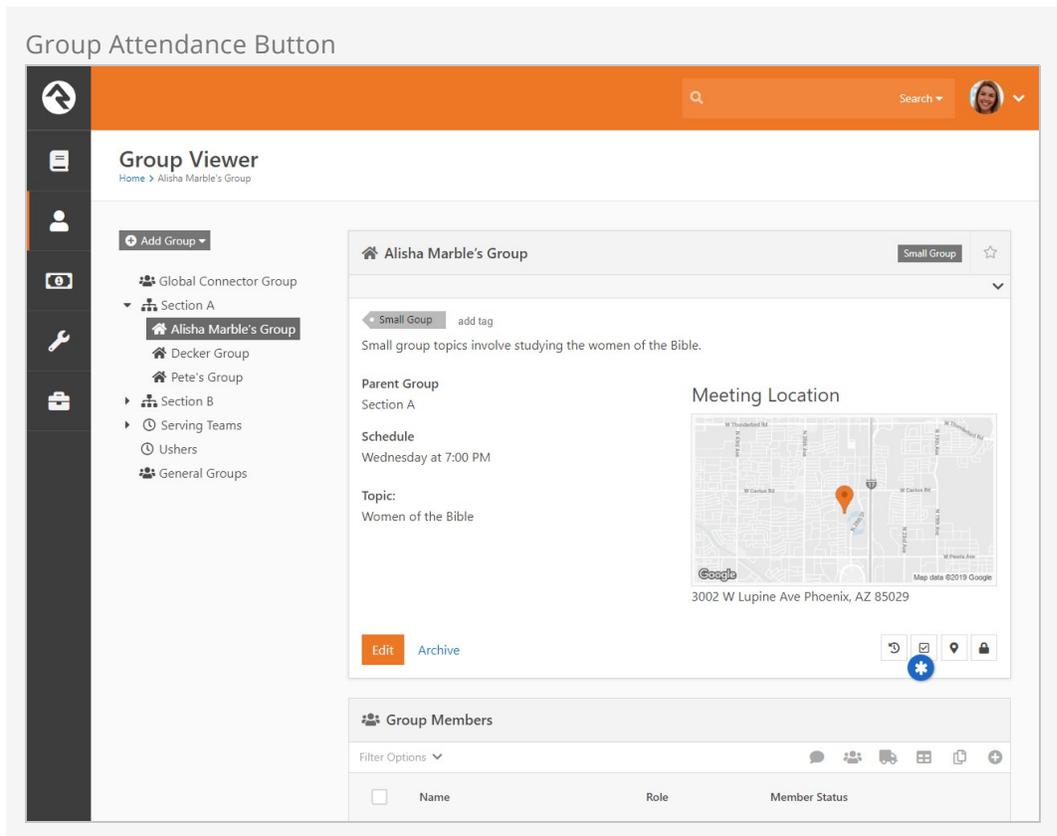
While this one setting is all you need to enable the attendance features, there are a couple of other settings that help improve the attendance tools:

- **Group Schedule Options:** While a group schedule is not required to take attendance, having a schedule will simplify the attendance entry because it will guide the user to enter attendance on those dates when the group meets.
- **Schedule Exclusions:** While each group can set its own schedule (including exclusion dates) you may want to set exclusion dates for every group of this type. This is especially helpful when using the simple schedule option where you only specify the day of the week and start time for a group. Adding these group type schedule exclusions help to keep email attendance reminders from being sent.
- **Send Attendance Reminder:** This checkbox will enable the sending of an attendance reminder email to the group leader the day the group is scheduled to meet.

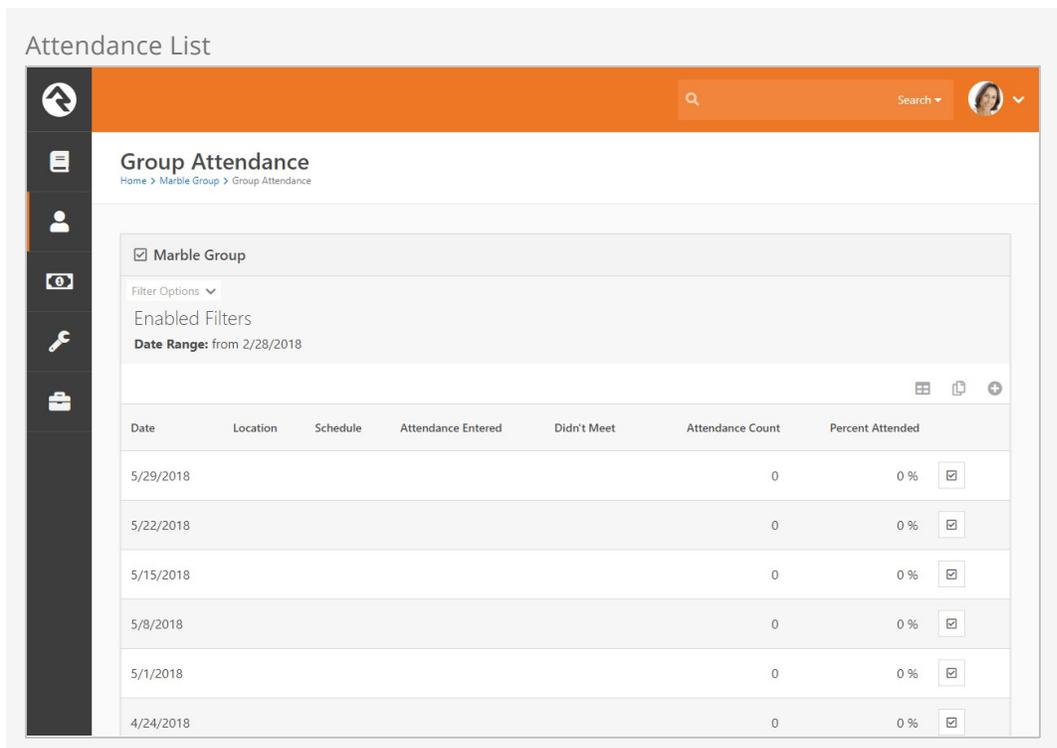
## Entering Attendance Information

### Internal Attendance Features

There are several ways to collect group attendance. The first is to use the internal attendance features built into the group viewer under [People > Group Viewer](#). You'll notice an attendance button on the group details block for groups that are configured to take attendance.

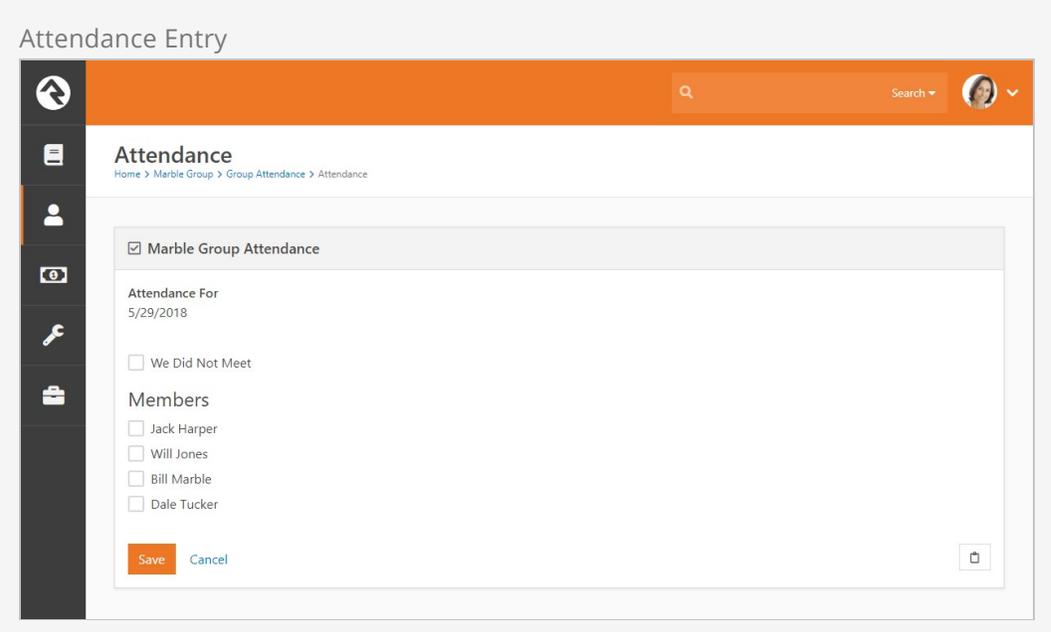


Selecting this option will bring up the group attendance grid. This grid lists the previously entered attendance for the group and allows you to enter new attendance records from the add button in the grid's footer.



Selecting the button will take you to the attendance entry screen below. From this

screen you can check off all those who attended the group or note that the group did not meet on its scheduled time. You can also print an attendance sheet which allow attendance to be collected via a register.



### External Attendance Features

Entering attendance on this internal screen is great for staff-entered attendance. Often times you will want to push the responsibility of attendance entry to the group leaders. One way to do this is to allow them access to the leader toolbox. See the Group Leader Toolbox chapter for details on this set of tools.

### Rapid Attendance Entry

The Rapid Attendance Entry method of recording attendance may come in handy for your groups. To learn more, see the Rapid Attendance Entry chapter of the [Checking Out Check-In](#) manual.

## Attendance Reminders

As noted in the configuration section above, you can also configure Rock to send an email to the group leader on the day that their group meets to remind them to take attendance. This email will include a link to take them straight to the attendance detail screen. Since each group leader gets an individual email, we have enabled this link to not require a login to help simplify the process (the user however must have edit rights to the group to enter attendance).

There are two other configuration points for attendance reminders. The first is the system email that is used as the template for the email. This template can be edited under:

[Admin Tools > Communications > System Emails > Group Attendance Reminder](#).

The other configuration point is the job that is run to send the emails on a daily basis. This job must be created for every group type that requires reminders. For more

information on this job see the [Service Jobs Relating To Groups](#) section below.

### Before You Report

When running reports on attendance data be sure to filter on *Did Attend* to show those who attended the event.

# Group Sync

Have you ever thought, "How am I going to keep the member list of this group up to date?" Well, the Group Sync might just turn out to be your next best friend.

There are times when the members of a group can be automated. Take, for instance, a security group created to give access to a toolbox for your group leaders. Those leaders are already set up in Rock. Keeping this in sync manually would be nearly impossible as you add and remove new groups. With the Group Sync feature this can all be automated for you. In fact if you can create a Data View of people you can sync them to a group. Here's how.

First create a Data View of the people that should be synced as group members. Next go to the group you'd like to sync to and edit its details. If you have *Administrate* access to the group you'll see a panel labeled `Group Sync Settings`. This panel is displayed if there is at least one Group Sync set up for the group, regardless of whether Allow Group Sync is enabled in the *Group Type Detail* screen. Below are the different configuration options available.

## Group Sync Settings

The screenshot shows a 'Group Sync Settings' dialog box with the following fields:

- 1 Sync Data View:** A dropdown menu.
- 2 Group Role to Assign:** A dropdown menu.
- 3 Welcome Email:** A dropdown menu.
- 4 Exit Email:** A dropdown menu.
- 5 Create Login During Sync:** A checkbox.

Buttons: Save, Cancel

### 1 Sync Data Viewer

This is the data view you created to use as the source of your sync. This data view will be run and compared to the active member list of the group each time the *Group Sync*. job runs. (By default this job runs every 20 minutes. You can change this setting in the *Schedule Job Detail* screen located at [System Settings > Jobs Administration > Schedule Job Detail](#).)

### 2 Group Role to Assign

Select the role you want to assign members added by the selected Data View. A sync is performed for each Group Role.

### 3 Welcome Email

If you'd like to notify new group members of their new status in life you can configure an email to let them know. We've provided a good template called *Sync Welcome To Group* that covers most cases. If the member already had a login it even reminds them what their username is (not their password though, we store that in a super-secret way that not even we can decrypt it). If you selected to create logins and they didn't already have one, we'll send them their new username and password (since we just created it we do know what this is).

### 4 Exit Email

You can also choose to send a notification that they're no longer a part of the group.

### 5 Create Login During Sync

When syncing with security roles you may also want the job to create logins for new group members. This will give them access to use their new permissions.

Once a Group Role is managed by a sync, members cannot be added to that role manually; however, members not assigned that Group Role can still be added by hand. When adding a member manually, any Group Roles that are synced will not be included in the Role dropdown menu. A person can be assigned multiple roles in a group using a combination of manual adds and group syncs. You'll also notice a  icon on the member list to notify you that the group and that member are being automatically synced. The  icon is also displayed in the upper-right corner of the list. If you hover your cursor over the icon, Rock will display the roles being used to sync the members of the group.

### Security Tip

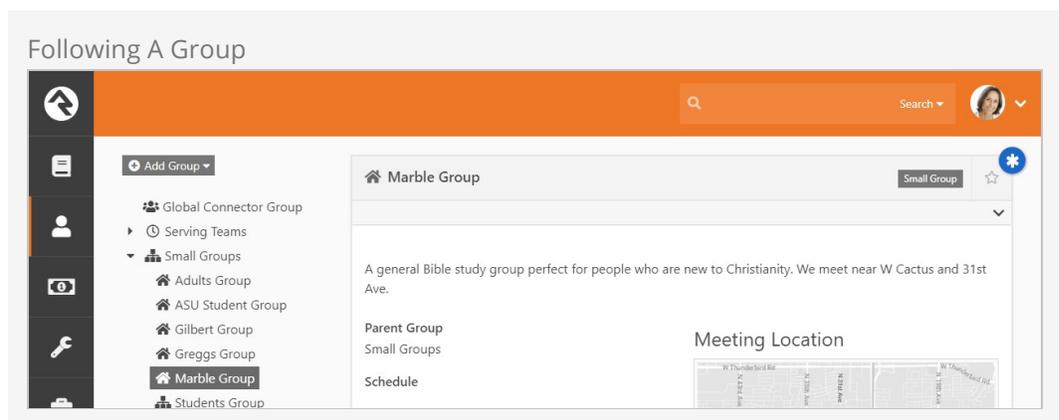
The System Job that runs the sync as a setting to create new logins in such a way that the individual will need to reset their password on their first login. This setting is initially set to not require a reset. Feel free to change this if you'd like.

# Group Following

Hopefully by now you've seen how to follow a person. If not stop what you're doing and [read this](#). You can also follow a group. Why...? Following a group allows you to put that group into easy reach from your [My Dashboard](#)'.

## How To Follow

Following is super simple. First navigate to the group you'd like to follow. Then, press the follow star in the upper right of the group detail block.



Following a group also enables several other features. For instance, when you have an event registration that places registrants into a group, you can configure the registration to also notify all individuals who are following that group.

# Group Members

Group members are a key component of groups. Like groups they come with a ton of options for customization.

## Group Member Roles

People often have special roles in groups. Some are leaders; others have unique duties. To help differentiate the members of a group, you can give each a *Group Member Role*. The list of possible roles are defined on the group type. Each role has the following configuration options:

- **Is Leader:** Determines if the individuals in this role are considered leaders within the group. This option enables additional functionality within Rock.
- **Can View:** This gives the members of this role the ability to view the group information in various group toolbox blocks.
- **Can Edit:** Allows members to edit group information in various group toolbox blocks.
- **Minimum Required:** Rock allows you to have rules on how many individuals can have certain roles. This setting configures the minimum number of individuals who must have this role. This will keep you from deleting a group member if the deletion will drop the number of individuals with this role below the minimum.
- **Maximum Allowed:** This setting is like the minimum but limits the number of people who are allowed this role. For instance, you might configure a group type to only allow one person to be the leader. You can also use this option to limit the number of adults in a family. A family is a group type.
- **Default:** When someone is added to a group, this will be the default role they'll be assigned to. Note: Some blocks will have a block setting that overrides this default. This setting will handle cases when a block does not provide an overriding setting.

## Group Member Status

The status of the group member tells you the person's standing within the group. The available statuses are:

- **Active:** The individual is currently participating in the group.

- **Inactive:** The individual is not currently participating in the group. Usually this status denotes that the person did participate at one point but isn't doing so anymore. How you choose to use this is up to you.
- **Pending:** The individual has not yet fully joined the group.

## Group Member Attributes

Group members can also have attributes. This allows you to track custom data points for each person as it relates to their membership in the group. Usually these *Group Member Attributes* are defined on the *Group Type* under:

Admin Tools > General Settings > Group Types .

When they're configured here, the attributes will apply to every group member of this type. You can also add Group Member Attributes to a specific group under:

People > Group Viewer > Group if you have *Administrate* access to the group.

## Editing a Group Member

Selecting a group member from a group member list will take you to the group member detail screen show below. From here you can change the role and status of the group member. You will also be able to modify any of the *Group Member Attributes* defined for the group. You will also see a note field for the group member. This is useful for keeping basic notes. Rock uses this field to provide specific information about the group member when processing things like workflows and alternate placements.

The screenshot shows a web interface for editing a group member. At the top, there's a navigation bar with a search icon and a user profile. Below that, the page title is "Editing a Group Member". The main content area is titled "Group Member Detail" and shows details for "Ted Decker", added on 6/15/2017. The form includes fields for "Person" (Ted Decker), "Role" (Leader), "Note" (empty text area), "Notified" (checkbox), and "Member Status" (radio buttons for Inactive, Active, Pending). There are "Save" and "Cancel" buttons at the bottom. A "Group Member Notes" section is visible at the bottom with a plus icon. The footer says "Crafted by the Spark Development Network / License".

If a group member has a note attached, a small note icon  will display on the group

member list to help identify this face.

It is also possible to move a group member from one group to another. When you do you will be given the option to transfer any group member notes to the new group.

### Group Member Attributes

If the group member's current group and the destination group share group member attributes with the same key then those attributes will be retained.

Otherwise, when the group member is moved the member's attribute information will be lost

## Group Member Workflows

By now you realize that groups are the backbone of Rock. So it makes sense that we'd invest in making them as powerful as possible. Group Member Workflows are one of these investments. So what do they do?

Group Member Workflows are an easy way to trigger workflows to launch when the state of a group member changes for a specific group. These events include:

- Being added to a group
- Being removed from a group
- Member status changes (e.g. status changed from *Pending* to *Active*)
- Member role changes (e.g. role changed from *Attendee* to *Leader*)
- Member attendance
- Member alternate placements (discussed in detail in the next chapter)

The workflows you define for these triggers can be configured for all groups of a specific type under:

`Admin Tools > General Settings > Group Types` or for a specific group under `People > Group View > Group`.

Below is the screen you'll see in either case.

### Required Access:

You must have *Administrate* access to a group to be able to configure Group Member Workflows.

## Group Member Workflow Settings

---

**Add Trigger** ✕

**Name** 1

**Start Workflow** 2

**Active** 3

**When** 4

**With Status of** 5

**With Role of** 6

---

**Add Trigger** ✕

**Name**

**Start Workflow** 1

**Active**

**When**

**From Status of** 7

**To Status of** 8

---

**Add Trigger** ✕

**Name**

**Start Workflow** 1

**Active**

**When**

**From Role of**

**To Role of**

---

**Add Trigger** ✕

**Name**

**Start Workflow** 1

**Active**

**When** 9

**First Time** 1

 Yes

- 1 **Name**  
This is the name you want to use to describe the trigger.
- 2 **Active**  
Indicates whether this trigger is currently active.
- 3 **Start Workflow**  
The workflow type you'd like to start when the trigger conditions are met.

- 4 **When**  
This determines when the trigger should be considered.
- 5 **With Status Of**  
This allows you to filter when the trigger is applied for members with a specific status.
- 6 **With Role Of**  
This allows you to filter when the trigger is applied for members with a specific status.
- 7 **From Status/Role Of**  
Determines what the original status/role was to use as a trigger filter.
- 8 **To Status/Role Of**  
Determines what the new status/role must be for the trigger to fire.
- 9 **First-Time**  
Determines if this trigger should only be activated the first time a person attends this group or everytime.

## Tips For Creating Triggered Workflows

When workflows are started from the group member triggers, they will pass in a few attributes for your convenience (as long as the attributes are defined). These include:

- **Person:** The person that the group member represents.
- **Group:** The group that the person is a member of.
- **AttendanceDateTime:** Only applies to the Member Attended Group trigger type and is the date/time that person attended the group.

Whenever possible, the workflow will also pass in the *Group Member* model as the entity of the workflow. You can access the group member properties and attributes by using the *Attribute Set From Entity* action with the following Lava:

```
{{ Entity | Attribute:'HasBook' }}  
{{ Entity.GroupMemberStatus }}  
{{ Entity.GroupRole.Name }}
```

### When Group Member Won't Be Passed:

Some member workflow triggers won't pass the group member as the entity. For instance, for the *Member Removed from Group* and *Alternate Placement* workflow types there won't be a group member left to pass when these events are launched.

# Alternate Placements

In some group usage scenarios you may want group leaders to be able to remove someone from their group but not have the group member fall to the wayside. Alternate placements allows you to do just that.

The first step is to configure the group type to have an alternate placement group member workflow. We discussed creating these workflows in the previous chapter. This member workflow type has two options: *Show Note* and *Note Required*. This allows the group leader to notate the reason why they are seeking to place the group member elsewhere.

**Group Type Detail**  
 Home > General Settings > Group Types > Small Group

**Small Group**

**Name \***  
 Small Group

**Description**  
 A group of people who share an interest and meet together with regular frequency.

General

Attendance / Check-in

Roles

Member Attributes

Group Attributes

Group Type Attributes

Group Requirements

**Group Member Workflows**

The workflow(s) that should be launched when group members are changed in groups of this type.

Name	Workflow	When	Active
☰ Alternate Placement	Alternate Placement	Member Added To Group	✓

Display Options

Save Cancel

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The *Group Member Detail* screen contains a button that allows you to initiate an alternate placement workflow. When you click this button, Rock displays the *Move Group Member* window, where you can select which configured workflow to launch (if there is more than one) and allow the leader to enter a note (if it's configured to do that).

## Alternate Placement Button

The screenshot shows a web application interface for managing group members. At the top, there is a navigation bar with a search icon and a user profile icon. Below this is a sidebar with various icons representing different functions. The main content area is titled 'Group Member Detail' and shows the details for 'Cindy Decker'. The form includes fields for 'Person' (Cindy Decker), 'Role' (Attendee), 'Notified' (checkbox), and 'Member Status' (radio buttons for Inactive, Active, and Pending). There is also a 'Note' field and a 'Requirements' section. At the bottom of the form, there are buttons for 'Save', 'Re-Check Requirements', and 'Cancel'. A 'Group Member Notes' section is visible below the main form, and a footer note states 'Crafted by the Spark Development Network / License'.

## Alternate Placement Note

The screenshot shows a dialog box titled 'Move Group Member'. It contains the following information: 'Current Group' is 'Marble Group'. 'Destination Group' is a dropdown menu. 'Move Notes' is a checkbox. At the bottom, there is a 'Move' button.

When the `Move` button is clicked, the workflow is launched and the person is removed from the group.

### Tips For Creating Triggered Workflows

When workflows are started from the group member triggers, they will pass in a few attributes for your convenience. These include:

- **Person:** The person that the group member represents.
- **Group:** The group that the person is a member of.
- **Note:** The note that was entered by the group leader.
- **Group Member Status:** The status that the group member was when the workflow was launched.
- **Group Member Role:** The role name of the group member when the workflow was

launched.

- Any attributes that match those of the group member attributes configured for the group.

# Group History

As you work with groups—adding and removing members, adjusting schedules and member roles, etc.—there may be times when you want to get a 40,000ft view to see how they're doing. Rock's Group History feature allows you to do just that.

Group History takes all of the configurations and changes made to a group and compiles them into timeline and table views that let you easily view the life and health of that group. Here's an example of a Group History timeline view.

The screenshot shows the 'Group History' interface for the 'Gilbert Group'. The page has a dark sidebar on the left with navigation icons. The main content area displays a vertical timeline of actions:

- Today**
  - You updated a group member** (May 23, 2018 10:57AM): Changed Helen Evans' group member role to Leader.
  - You updated the group** (May 23, 2018 11:12AM): Changed the group active to False and True.
- Monday, May 21**
  - You added 3 group members** (May 21, 2018 6:08PM): Alisha Admin Alisha Admin Sean Hansen.
  - You removed 3 group members** (May 21, 2018 6:13PM): Alisha Admin Sean Hansen Alisha Admin.
  - You updated the group** (May 21, 2018 6:19PM): Changed the group description to We're reading through The Story and discussing each chapter. But the descript... and We're reading through The Story and discussing each chapter.

At the bottom of the page, it says 'Crafted by the Spark Development Network / License'.

Rock ships with Group History enabled for small groups and serving groups. You can enable and disable Group History for any group type. However, because a lot of data can build up quickly, we recommend using it only with your more regular, stable groups. For example, enabling Group History for a Sunday School group where different children are in attendance each week would lead to crowded (and potentially messy) timelines and tables. Enabling it for a security team or other serving group that experiences fewer fluctuations makes a lot more sense.

OK, let's take a closer look at how to set up and use Group History.

## Enable Group History

To enable Group History for all groups of a certain group type, begin by locating the group type in:

`Admin Tools > General Settings > Group Types`.

In the *General* section of the *Group Type Details* screen, check the *Enable Group History* checkbox. You can customize the group type's display options in the *Display Options* section by assigning it a color and icon. These options come into play in a number of the Group History views, but we'll get into that later. For now, click `Save` and Rock will enable the history and options for that group.

## Enable Group History

Enable Group History

Group Type Detail  
Home > General Settings > Group Types > Small Group

Small Group

Name \*

Small Group

Description

A group of people who share an interest and meet together with regular frequency.

General

Purpose ⓘ

Child Group Types ⓘ

No Group Types Found

Inherited Group Type ⓘ

Group Capacity Rule ⓘ

None

Groups Require a Campus ⓘ

Yes

Group Status Defined Type ⓘ

Location Selection Modes ⓘ

Named

Address

Point

Geo-fence

Group Member Address

Multiple Locations ⓘ

Allow

Enable Location Schedules ⓘ

Yes

Location Types ⓘ

Meeting Location

Don't Inactivate Members ⓘ

Enable Indexing ⓘ

Allow Specific Group Member Attributes ⓘ

Enable Specific Group Requirements ⓘ

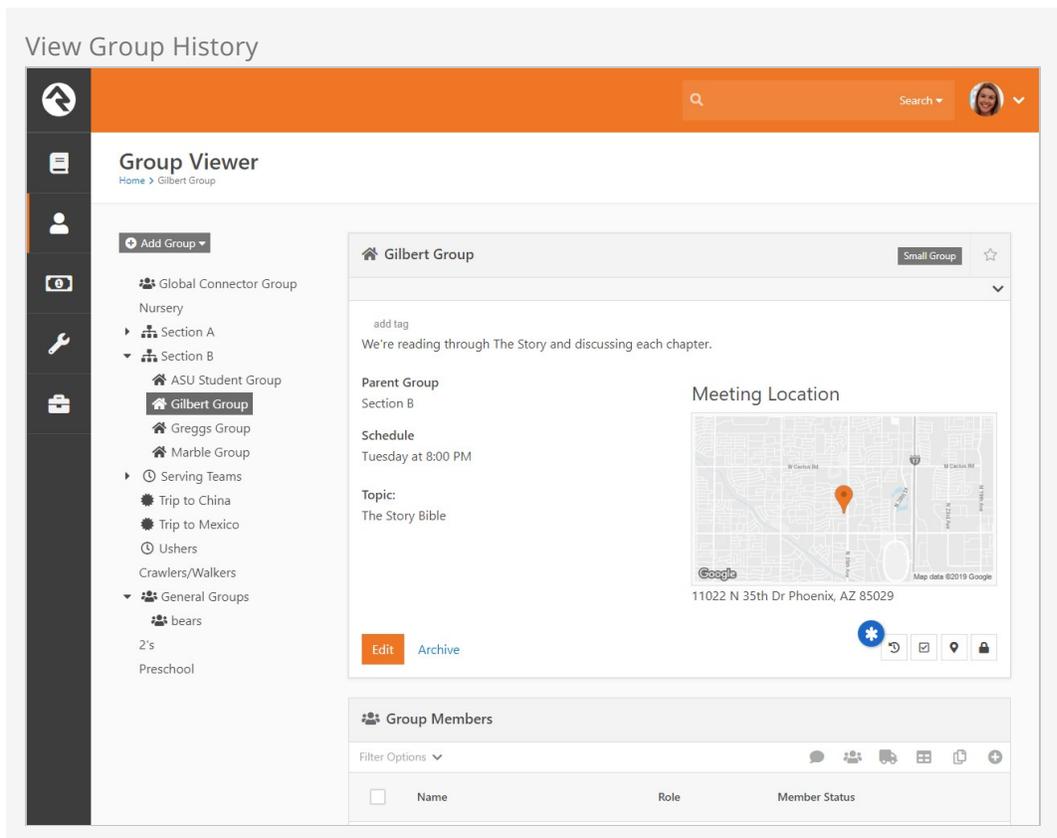
Allow Group Sync ⓘ

Allow Specific Group Member Workflows ⓘ

Enable Group History ⓘ

## View Group History

Now that you have Group History enabled, you can jump to that 40,000ft view. Locate the group in the Group Viewer and click the  button.



### Archived VS Delete:

Groups with group history turned on, will have an Archive button rather than deleting the group completely. Archived groups can be seen by Admins under

[Admin Tools > General Settings > Archived Groups.](#)

This brings up the group's timeline view, shown earlier, including both member and group history information. The Group History screen shows the history of the group by day for the lifetime of that group. Each event on the timeline has an icon that corresponds to a type of action.

-  - Member added
-  - Member removed
-  - Group edited
-  - Other/general group action

If there is more information than space available for an event on the timeline, you can view the entire contents by hovering your mouse over the text. For multiple occurrences on the same day, Rock will display link to expand the area to display all of the actions for that day.

To hide member history and view only actions made on the group level, click the  button.

You can also zoom in from that 40,000ft view and get a closer look at the history of the members of a group. Click [Member History](#) to display a group's members and the

history/dates of their involvement in the group. Click on a specific person to view a timeline of their involvement with the group.

**Group Member History**

Home > Gilbert Group > Group History > Group Member History

**Gilbert Group**

**Historical Group Members**

Filter Options

Name	Date Added	Date Removed	Last Role	Last Status
Helen Evans	6/15/2017		Leader	Active
Brian Gilbert	6/15/2017		Attendee	Active
Wendy Gilbert	6/15/2017		Attendee	Active
Sean Hansen	5/21/2018		Attendee	Active
Corrie Stone	6/15/2017		Attendee	Active
Nancy Turner	6/15/2017		Attendee	Active

50 500 5,000 6 Group Members

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## View Group History in a Person's Profile Page

Individual group history is also available on the *Person Profile*, under the *Groups* tab.

## Group History in Person Profile

The screenshot displays a user profile for Ted Decker (Theodore) with a focus on group history. The profile includes a navigation sidebar, a header with search and user options, and a main content area with tabs for Person Profile, Extended Attributes, Groups, Contributions, Benevolence, Security, and History. The Groups tab is active, showing a Group History timeline for 2018 with bars for Ushers and Decker Group. Below the timeline is a Group Types section and a Group List table.

**Profile Information:**

- Name:** Ted Decker (Theodore)
- Member:** Main Campus
- Age:** 39 yrs old (2/10/1979)
- Gender:** Male
- Married:** 17 yrs (1/4)
- Graduated:** 1994
- Phone:** (623) 555-3322 Home, (623) 555-3322 Mobile, (623) 555-2444 Work
- Email:** ted@rocksolidchurchdemo.com

**Decker Family:**

- Cindy (38)
- Noah (11)
- Alex (8)
- Ben
- Home Address:** 11624 N 31st Dr, Phoenix, AZ 85029

**Group History (2018):**

- Ushers (Green bar)
- Decker Group (Blue bar)

**Group Types:**

- Serving Team
- Small Group

**Group List:**

Name	Group Type	Description	Role	Added
Decker Group	Small Group	Small group with Ted as the group leader.	Leader	11 Months Ago
Ushers	Serving Team		Member	11 Months Ago

50 500 5,000 2 Groups

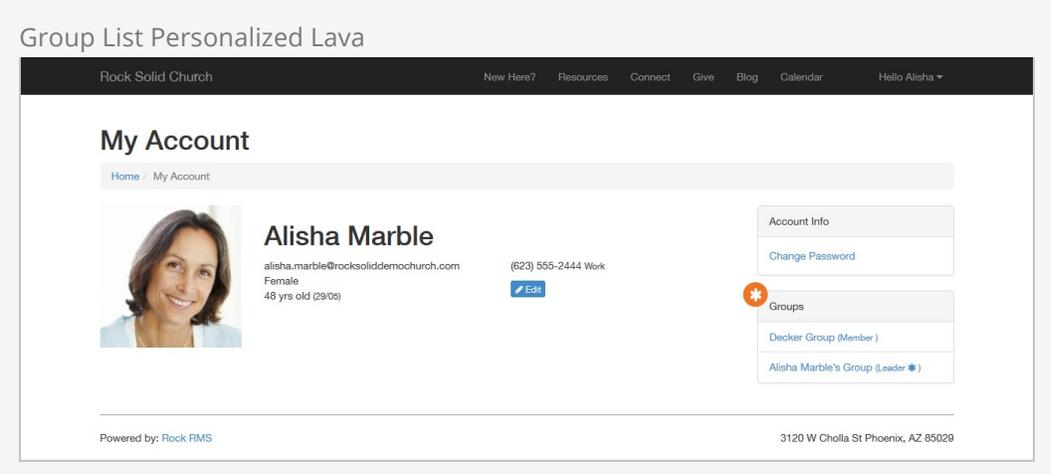
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Hover your mouse over any of the events on the person's timeline to display the details of that event. Note the timeline colors correspond to the color assigned to the group back when Group History was enabled. If the person is a group leader, the color will be slightly darker. You can also click on a specific event to drill down into the group. As with all of the tabs on the *Person Profile*, the information is filterable. Click the  button to display the filter options.

# Group Leader Toolbox

The group leader toolbox can be found on the external site under *My Account*. The toolbox is made up of just a couple of pages and blocks that provide a ton of options. The out-of-the-box configuration is meant more as a sample of what's possible rather than a *one size fits all* model. Let's look at each of the blocks in detail to give you an idea of what you can achieve.

## Group List Personalized Lava



The screenshot displays a user profile for Alisha Marble on a website titled "Rock Solid Church". The page is titled "My Account" and includes a navigation bar with links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", and "Hello Alisha". The profile information includes a photo of Alisha Marble, her name, email address (alisha.marble@rocksoliddemochurch.com), phone number ((623) 555-2444 Work), gender (Female), and age (48 yrs old (29/05)). There is a "Change Password" link and an "Edit" button. A "Groups" section lists "Decker Group (Member)" and "Alisha Marble's Group (Leader)". The footer indicates the site is "Powered by: Rock RMS" and provides the address "3120 W Cholla St Phoenix, AZ 85029".

This block shows a listing of groups that the current user is a member of. Through block settings you can configure which group types to show or not show. Using Lava you can adjust the look of this block to your heart's content.

## Group Detail Lava

## Group Detail Lava

The screenshot displays the 'Group Detail Lava' page for the 'Decker Group'. At the top, there is a navigation bar for 'Rock Solid Church' with links for 'New Here?', 'Resources', 'Connect', 'Give', 'Blog', 'Calendar', and a user profile for 'Hello Alisha'. Below the navigation bar is the 'Group Toolbox' section, which includes a breadcrumb trail 'Home / My Account / Group Toolbox' and a list of groups: 'Decker Group (Member)' and 'Alisha Marble's Group (Leader ★)'. The main content area features a map showing the group's location at the intersection of W Cactus Rd and N 31st Dr. Below the map, the group name 'Decker Group' is displayed, followed by the description 'Small group with Ted as the group leader.' and 'Group Details: Topic: Book of Genesis'. The 'Leaders' section lists 'Ted Decker (Leader)'. There is an 'Edit' button next to the leaders list. Below this, there are tabs for 'Roster' and 'Attendance'. The 'Active Members' section lists four members: Cindy Decker (Member), Ted Decker (Leader), Alisha Marble (Member), and Bill Marble (Member). Each member's profile includes their name, role, contact information (phone numbers for home, mobile, and work), and email address. At the bottom of the member list, there are buttons for '+ Add Member' and 'Email Roster'. The footer of the page includes 'Powered by: Rock RMS' and the address '3120 W Cholla St Phoenix, AZ 85029'.

This is the money block. With this block, you have access to every detail of a group that's accessible in a Lava template. It also has some special *Postback Commands* that allow you to enable editing of the group details and its members. The sky is really the limit when it comes to customizing the look of this block.

### Note on Security

When adding a person to the group the default view allows you to select the new individual from those already in the database. In order for this search to work you will need to adjust the security on the `api/People/Search` REST endpoint. You can find this under:

```
Admin Tools > Security > REST Controllers > People .
```

If you would prefer not to allow group leader to search the list of people in the database you can provide an alternate *Add Person* page in the block settings. On this new page you may choose to setup a workflow entry form, a group registration block or an simple email form.

## Group Attendance List and Detail

# Group Attendance List

## Group Attendance

Home / My Account / Group Toolbox / Group Attendance

- Groups
- Decker Group (Member)
- Alisha Marble's Group (Leader)
- Ushers (Member)



### Decker Group

Small group with Ted as the group leader.

Group Details:

Topic: Book of Genesis

Leaders:

- Ted Decker (Leader)

Edit

Roster Attendance

Enabled Filters

Filter Options

Date Range: from 01/07/2015

Date	Location	Schedule	Attendance Entered	Didn't Meet	Attendance Count	Percent Attended	
31/08/2015			✓		4	100%	
24/08/2015			✓		4	100%	
17/08/2015			✓		4	100%	
10/08/2015			✓		2	50%	
03/08/2015			✓		3	75%	
27/07/2015			✓		3	75%	
20/07/2015			✓		4	100%	
13/07/2015			✓		4	100%	
06/07/2015			✓		3	75%	
29/06/2015					0	0%	

50 500 5,000 10 Occurrences

Print Export Refresh

# Group Attendance Entry

Rock Solid Church      New Here?   Resources   Connect   Give   Blog   Calendar   Hello Alisha ▾

## Group Attendance Detail

Home / My Account / Group Toolbox / Group Attendance / Group Attendance Detail

**Groups**

- Decker Group (Member)
- Alisha Marble's Group (Leader ★)

**Attendance For \***

30/08/2015 📅

We Did Not Meet

**Members**

- Cindy Decker
- Ted Decker
- Alisha Marble
- Bill Marble

[Save Attendance](#)   [Cancel](#)

---

Powered by: Rock RMS      3120 W Cholla St Phoenix, AZ 85029

These two blocks allow you to track the attendance of a group. By default these options will only show for groups of a type with attendance enabled.

# Group Finder

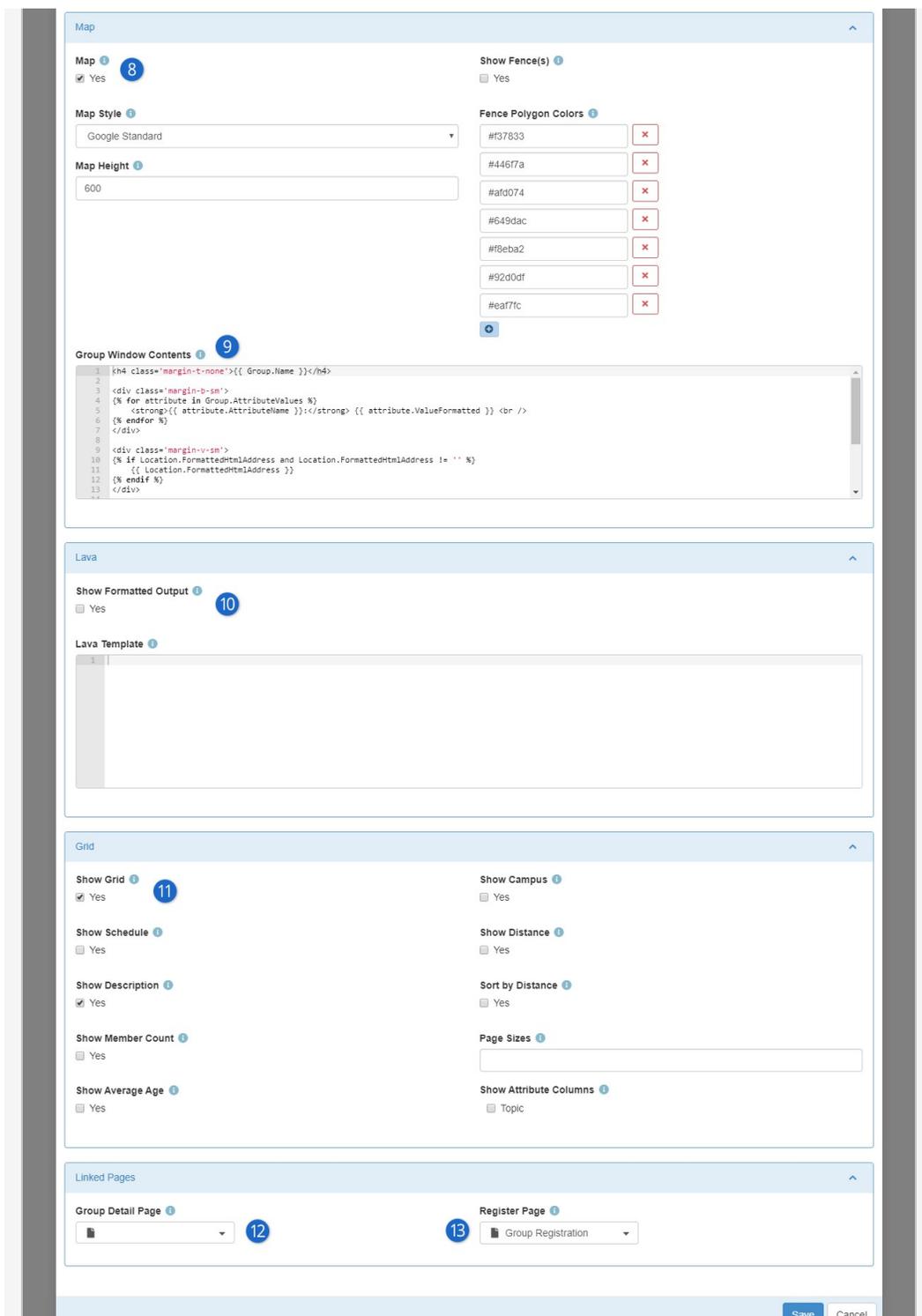
The group finder is another very powerful block that allows your website visitors to search for a group and register quickly. The group finder has been configured on the external website under `Connect > Small Groups`.

As configured out-of-the-box, it allows for search by the day of the week that the group meets and the study topic. Selecting your criteria and clicking `Search` returns all of the groups that match that criteria. From there you can choose to register for a group.

## Public Groups

Only groups that are marked `Is Public` can be viewed in the group finder. You can change the public setting by editing the group.





## 1 Group Type

Start by choosing the GroupTypes you would like to be available through the group finder

## 2 Geofence Group Type

Some organizations may want to limit the results to certain geofenced areas that are close to an address that is provided during the search. For instance some churches with neighborhood ministries may only want to show groups that meet in a person's neighborhood. These churches would create a group type to manage these *neighborhoods*, each as a

group of that type. Selecting this group type would then prompt the user to enter their address as part of the search criteria. This address would be used to determine which neighborhood geofence they live in so that only groups in that fence are displayed.

Below the two Group Type selectors, you have options for changing what your filters are called

**3 Display Day of Week Filter**

If your groups have a "weekly" type schedule, you can offer people either a single-select or a series of checkboxes they can use to find groups which meet on the day they choose

**4 Display Time of Day Filter**

If your groups have a "weekly" type schedule, you can offer people the ability to filter for groups meeting at a specific time. They can choose

5:00pm to find groups which meet in the evening, for instance.

**5 Display Campus Filter**

Allows people to filter the list of groups according to the campus they belong to

**6 Enable Campus Context**

Configures the block to automatically filter for groups belonging to a specific campus, if you've set the Campus Context for the page

**7 Display Attribute Filters**

Allows you to choose which Group Attributes people can filter the list by

**8 Map**

This section allows you to display or hide the map on which the filtered groups will be shown. You can choose the Map Style and size, whether you show the fences from the GroupType you chose in item #2 above, and define a list of colors through which the fences will cycle

**9 Group Window Contents**

The HTML and Lava used to display a pop-up window on the map when a group is clicked. By default it will show the group name, location, attributes, and a list of members.

**10 Lava: Show Formatted Output**

Allows you to configure your own output based on the groups matching the filters. If you enable both the Lava and grid the Lava results will be shown above the grid. Your Lava will have access to an array called Groups which you can loop through to display groups matching the filters.

**11 Show Grid**

Configures whether the grid (table) of groups will be displayed once filters are chosen. If it's shown, you can also configure whether other information about each group is included in the grid, such as the Schedule, Description, Member Count, Average Age (of members), the Campus, the distance from their address, and whether the groups are sorted according to how close they are to the person's address. You can also choose how many groups are shown on each page and which Group Attributes you'd like to display in the grid.

**12 Linked Pages: Group Detail Page**

Specifies a page the person will be taken to if they ask for more details about a group. This page is available to your Lava using the `LinkedPages.GroupDetailPage` object

### 13 Register Page

Specifies a page the person will be taken to if they click the "Register" button. This page is available to your Lava using the `LinkedPages.RegisterPage` object

## Another Way To Use the Group Finder

If you pass a 'PersonGuid' through the page's query string you can use the group finder to register that person for a group. You can use this trick to say link from a group badge on the person profile page if they are not already in a group. This allows a staff person to quickly register them for a group without a lot of clicking around.

Consider using the `Group Member Add From URL` block with this feature.

## Group Registration

Registering for a group is a simple process using Rock's Group Registration block. Out-of-the-box this block will ask for basic contact information for the individual and their spouse. By adjusting the block settings you can customize this block in several different ways. Let's walk through each one:

- **Mode:** There are three entry modes for the registration form.
  - **Simple:** This mode only asks for the individual's first name, last name and email address.
  - **Full:** This mode additionally asks for more contact information including home phone, cell phone and address.
  - **Full With Spouse:** This mode is identical to the normal *Full* mode but adds the spouse's first name, last name, cell phone and email.
- **Group Member Status:** This setting determines the group member status that will be used when they are added to the group. Options include Pending, Active or Inactive.
- **Connection Status:** The registration form will attempt to find a matching record in the database using the first name, last name and email. If a record cannot be found, a new record will be created in the database. When that occurs, this will be the connection status that is used for these new records.
- **Record Status:** This represents the record status that will be used for new records. It's best to leave this as *Pending* so individuals on your data integrity team can manually review them for possible duplicates and merge the records if needed.

- **Workflow:** This option allows you to launch a workflow after the registration. The group member will be attached to the workflow as the Entity.
- **Lava Template:** This is a Lava template that will be applied to the top of the registration block. This allows you to customize the experience for the individual.
- **Result Lava Template:** This Lava template is used to craft a response message after the registration is completed.
- **Result Page:** You can optionally send the individual to a new page after the registration is processed.

# Group Scheduling

People feel valued when they're part of a group working toward a common goal. The most important part of gathering a group of people to accomplish a task is communication. Ensuring that everyone in the group knows where they should go and when they should be there is a critical first step in making them feel like they're included and valued. The group scheduling tools in Rock are an amazing tool for empowering those within your organization to communicate important information about locations and times to group members, and to check up on whether that information was received and responded to.

Sending out schedules can go well beyond serving teams for weekend services. Just a few ideas to get you brainstorming:

- VBS staff and volunteer schedules
- Summer camp volunteers
- Monthly campus potluck rotation
- Youth groups
- Special events
- And so much more

Now with all that said and done, most of the examples below will be referring to weekend schedules since it is used this way most commonly. But we encourage you to think big. Don't limit your organization's use of the group scheduler to the obvious. And don't be afraid to think outside the box.

## Scheduling Tools

Any organization needs a way to manage which workers are assigned to what positions. Many approaches are used to schedule workers, from a paper on a clipboard, through excel spreadsheets, to complex and costly specialized scheduling software. Sometimes all of these approaches and more are in use within the same organization. In Rock, all of these methods can be put to rest by using the `Group Scheduling` feature as your one-stop-shop for coordinating people for any event.

## Overview

The general point of using this tool is to quickly drag and drop people into a room for a specific time. The tools are very customizable for you to configure this so it will work for your organization's flow. A typical example here will be scheduling volunteers for your nursery team for the weekend. You'll pick the group, week, time, and location—the

people will then be filtered based on those selections. Now you will drag and drop people names into the desired areas or use the auto tool. Make sense? If not, don't worry, we'll break each step down into detail.

## Scheduling Toolbox

Let's start with the power each person has. On the [Schedule Toolbox](#) on their My Account page they can:

- See what upcoming opportunities they are assigned to.
- Choose the frequency of serving. This could be once a month, every week, 1st and 3rd, etc.
- Choose which room/area of volunteering they prefer, plus preferred times.
- Set blackout dates—vacation, work, etc.

- 1 Send Reminder**  
How many days prior that a reminder email is sent about an upcoming schedule.
- 2 Current Schedule**  
The frequency someone is available to serve.
- 3 Assignment**  
Preferred times and locations. Time is required to choose a location. Location preferences are optional. If no location is selected, the auto scheduler will assign the person to the next available position at the preferred time.
- 3 Blackout Dates**  
Dates the person is not available to serve.

The Schedule Toolbox relieves your staff of a significant load because individuals can do that work for themselves. When each person logs in to the external website, within their `My Account`, they have access to their `Schedule Toolbox`. Don't worry; we'll still have some work for you to do.

At least initially, you will need to configure all your locations and schedules within your groups. Once this part is complete, all you'll do is place volunteers into their dedicated serving positions and send the request.

Along with being able to do everything we've listed above for volunteers, here are more actions you can take:

- Set the minimum, desired, and maximum people needed for each room and time.
- Auto-schedule each room and time based on volunteers' preferences.
- Manually drag and drop people into positions and send a request for confirmation.
- Manually accept or decline individuals from the scheduler page.
- Individually resend a request to serve.
- And more...

Let's take an in-depth look at each of these settings and how to configure it for your organization.

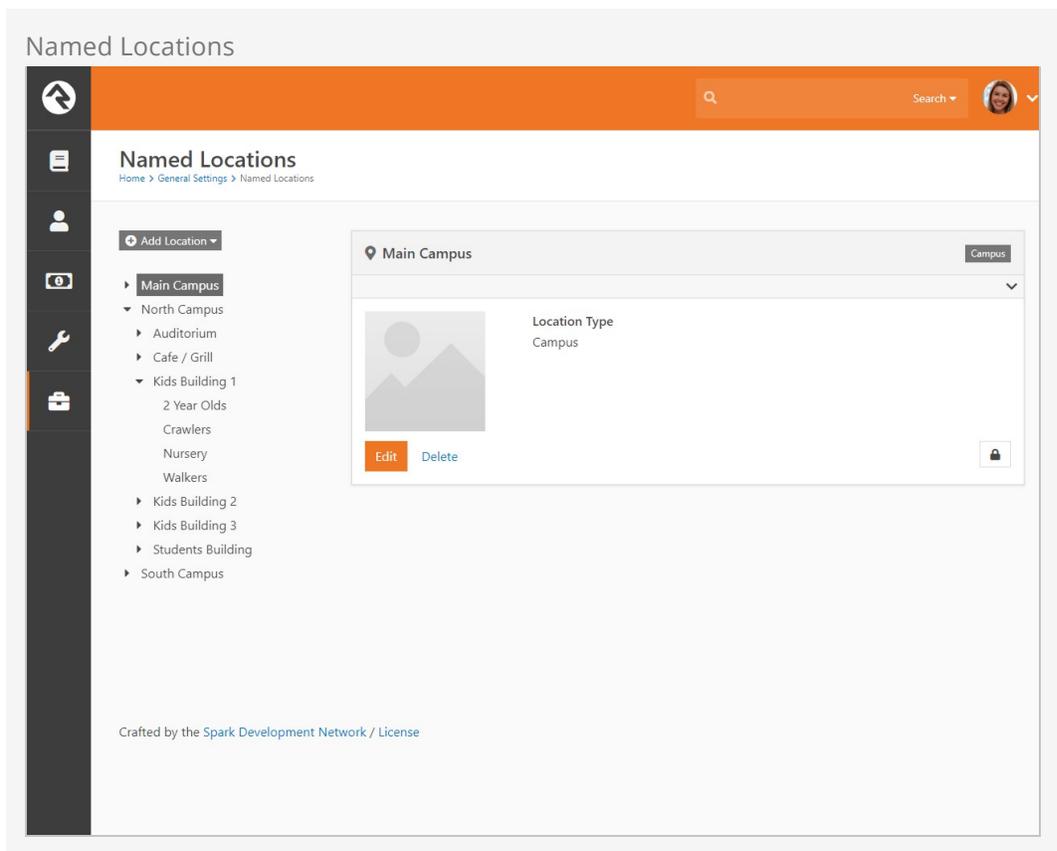
## Configuring Group Scheduling

There are two critical pieces of the puzzle you need before starting to schedule volunteers. It's simple to get these pieces because when it comes to asking for help, people are hardwired to know *when* and *where* they are needed. So, we are going to make sure our `Named Locations` and `Schedules` are configured.

Be sure to check out the Checking-Out Check-In user guide for more detail about adding locations. For `Group Scheduler`, however, you will be adding more than rooms. Perhaps you'll be adding sections, areas or positions. These might be used to schedule specific areas of your lobby for the greeters to be stationed. Or, if you'll be using Rock to schedule your band and technical teams, add a location named 'Audio' or 'Piano' and change the location type to be a position.

### Adding Location Types:

Location Types are `Defined Types`. To add more, open the Defined Type `Location Type` and click the `+` button.



Next up: schedules, also known as times. This is found in `General Settings > Schedules`. You should have a few parent groups for different types of schedules. For group scheduling, we want to make sure the times are accurate since, you guessed it, location and time are critical aspects of scheduling volunteers.

### One Schedule:

It is best practice to have one schedule for each time. If you have multiple sites with the same start times, you will only need one schedule for that time.

Lastly, make sure scheduling is enabled on the `Group Type`. Navigate to `General Settings > Group Types > Serving Teams | Scheduling`. There are additional settings you can configure for your organization. To enable, check the Scheduling Enabled box.

Group Type

Group Type Detail  
Home > General Settings > Group Types > Serving Team

Serving Team

Name  
Serving Team

Description  
Used to track groups that serve in the organization.

General

Attendance / Check-in

Scheduling

Scheduling Enabled

Schedule Confirmation Email  
Scheduling Confirmation Email

Schedule Cancellation Workflow Type  
[Settings Icon]

Requires Reason If Schedule Declined

Schedule Confirmation Email Offset Days  
4

Schedule Reminder Email  
Scheduling Reminder Email

Schedule Reminder Email Offset Days  
2

Roles

Member Attributes

Group Attributes

Group Type Attributes

Group Requirements

Group Member Workflows

Display Options

Save Cancel

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## Configuring Groups

We're almost to the fun part. The `Group Scheduler` requires some information from the group before it's ready. In the `Group Viewer`, add `Meeting Details` for every location that needs assigned people. This might be a pretty long list for some groups like the list we see in the screenshot below.

Group Viewer  
Home > Elementary Age

+ Add Group

- Global Connector Group
- Jr Camp 2019
- Section A
- Section B
- Serving Teams
  - Main Campus
  - North Campus
    - Children's
      - Elementary Age**
        - Nursery Team
        - Food Services
        - Greeter's
        - Tech Booth
        - Usher's
        - South Campus
- General Groups

Elementary Age

Serving Team North Campus

Name: Elementary Age  Active  Public

Description: Preschool - 5th Grade.

General

Meeting Details

Location	Type	Schedule(s)		
1st Grade 1	Meeting Location	Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm		
1st Grade 2	Meeting Location	Saturday 5:30pm, Sunday 10:00am, Sunday 11:30am		
3 Year Olds	Meeting Location	Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm		
Kindergarten 1	Meeting Location	Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm		
Kindergarten 2	Meeting Location	Saturday 5:30pm, Sunday 10:00am, Sunday 11:30am		
2nd Graders	Meeting Location	Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm		
3rd Graders	Meeting Location	Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm		
4th Graders	Meeting Location	Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm		
5th Graders	Meeting Location	Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm		

Scheduling

Group Attribute Values

Member Attributes

Group Sync Settings

Save Cancel

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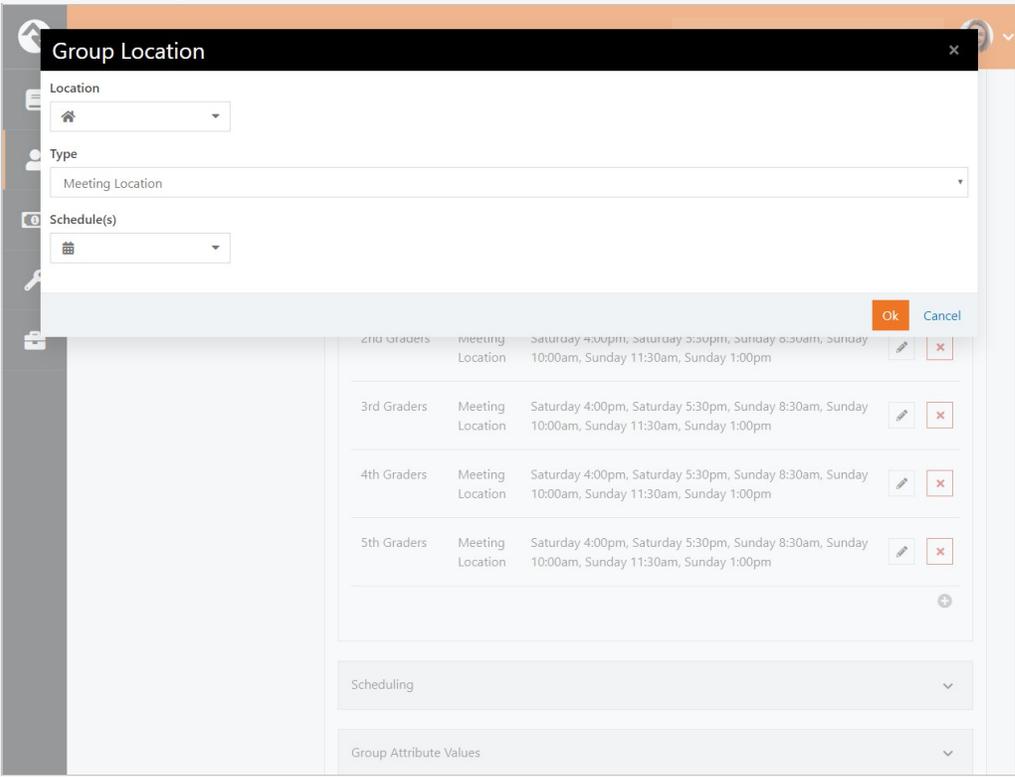
At the end of the day, the goal for this page is to have separation and customization for

each group. You can break your groups up any way that works best for your flow of work. We recommend that you do some planning before jumping in and creating groups so you can maximize the effectiveness of this feature for your staff.

## Meeting Details

Click on the  icon in the `Meeting Details` tab.

This opens a window to add a new location. The properties include Location, Type, and Schedule(s).



**1 Location**  
Choose from the drop down (these are the rooms from the named location page).

**2 Type**  
These are Defined Types found in `General Settings > Defined Type > Group Location Type`.

**3 Schedules**  
This drop down shows all the times from the `Schedules` page in General Settings.

You can select multiple times just by clicking on them one by one. Make sure you use the same schedule for every group in the meeting details. This will avoid scheduling conflicts. More properties can be selected to add the minimum, desired and maximum

people needed for that room and its times.

The screenshot shows a 'Group Location' dialog box with the following settings:

- Location: Jr High
- Type: Meeting Location
- Schedule(s): Saturday 5:30pm, Su...

Capacities	Minimum	Desired	Maximum
Saturday 5:30pm	3	5	6
Sunday 10:00am	2	3	5
Sunday 11:30am	2	3	5
Sunday 1:00pm	3	5	7

Below the dialog, a list of meeting locations is visible:

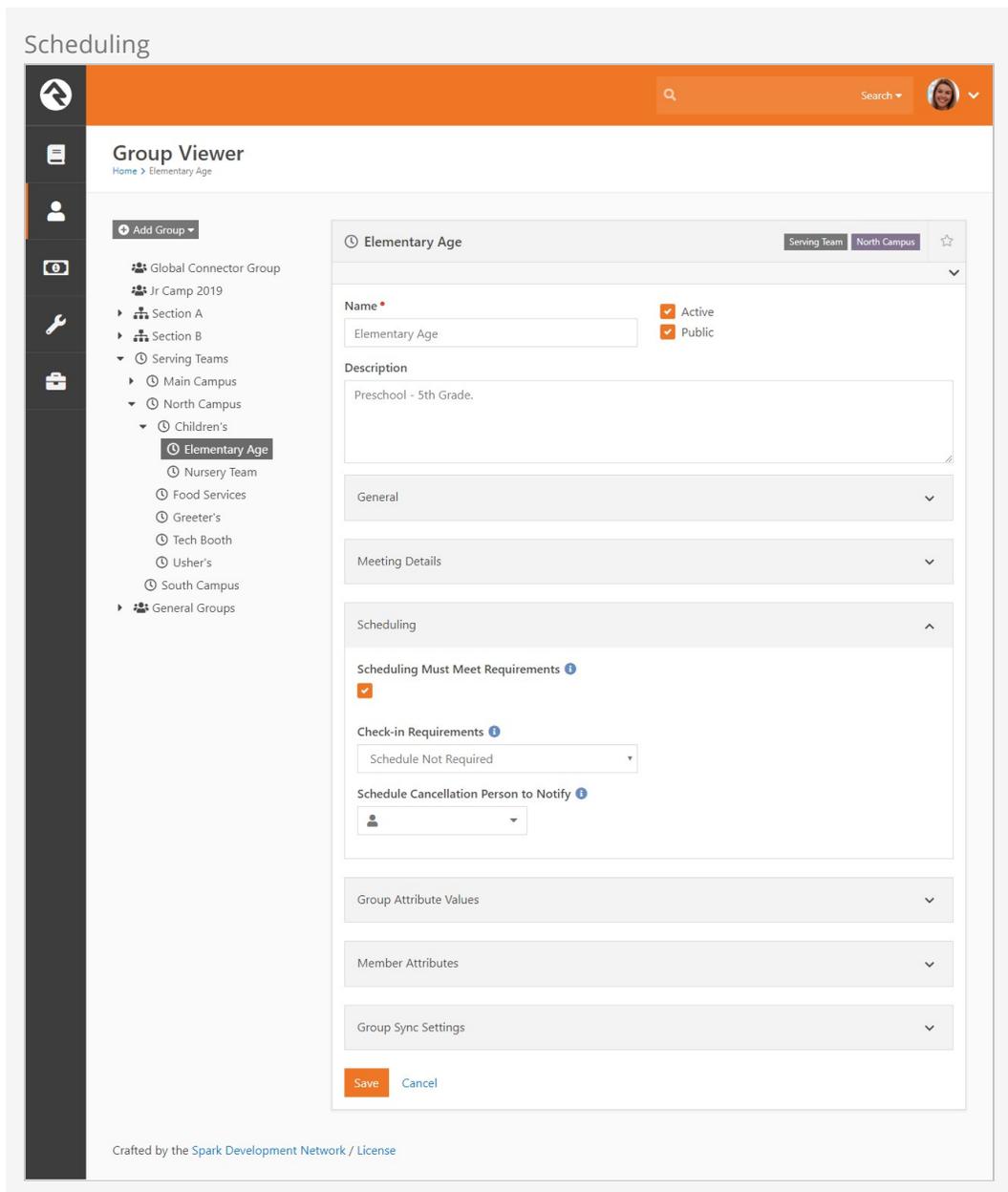
- 4th Graders Meeting Location: Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm
- 5th Graders Meeting Location: Saturday 4:00pm, Saturday 5:30pm, Sunday 8:30am, Sunday 10:00am, Sunday 11:30am, Sunday 1:00pm

You have the option to choose different capacities for each time. The `Group Location` page is where all those details are customized.

When its complete, you shouldn't have to do anything in the meeting details again until your organization opens more rooms or adds times.

### Members:

It goes without saying: it's best practice for your volunteers to be members in the group to appear on the people list in the Group Scheduler, although there are other ways to search for people in the Group Scheduler. We'll discuss that later.



The `scheduling` options you choose will be specific for each group.

## Group Scheduler

Now the moment of truth...the `Group Scheduler` page. This is where the magic happens. Okay, maybe not actual magic, but it is where the scheduling happens. This page will become very familiar to your staff, since it's the "magic page" for organizing group members into a location.

### Block Properties:

You can change the number of weeks to show on the drop down by changing it on the block properties. The default is set to 6 weeks.

# Navigating Group Scheduler

The screenshot shows the Group Scheduler interface. On the left is a dark sidebar with navigation icons. The main content area has an orange header with a search bar and a user profile. Below the header, the page title 'Group Scheduler' is followed by a breadcrumb trail: 'Home > Group Scheduling > Group Scheduler'. The interface is divided into several sections: a left sidebar with filters, a central 'People' list, and a right sidebar with event details. The filters include: 1. Group: A dropdown menu currently set to 'Nurser...'. 2. Week: A dropdown menu set to 'Week of 6/3/20'. 3. Schedule: Radio buttons for 'Saturday 4:00pm', 'Saturday 5:30pm', 'Sunday 8:30am', 'Sunday 10:00am', 'Sunday 11:30am', and 'Sunday 1:00pm'. 4. Locations: Checkboxes for '2 Year Olds', 'Crawlers', and 'Walkers'. 5. Source of People: Radio buttons for 'Group', 'Alt Group', and 'Data View'. 6. Show Matching Preference: A radio button. 7. Show All Group Members: A radio button. The 'People' list in the center contains names like Mariah Jackson, Ben Jones, Bill Marble, Jenny Michaels, Tom Miller, Daniel Peak, Becky Peterson, Brian Peterson, Jim Simmons, Sarah Simmons, Paul Smith, and Allie Song. The right sidebar shows event details for '2 Year Olds', 'Crawlers', and 'Walkers' on 6/8/2019 at 4:00 PM, listing participants like Cindy Decker, Sam Hanks, Pete Foster, Ty McClintock, Sally Morgan, Alisha Marble, and Tress Meek. Numbered callouts 1 through 10 are placed over the interface to highlight these features.

## 1 Group

Here you choose which group you'll be scheduling. i.e. Tech Booth, Nursery, Greeters, etc. This drop down is limited to one group at a time to avoid conflict with the people list.

## 2 Week

This is the week: all schedules within that week will be shown including midweek events tied to the group. Weeks in Rock start on Monday and end on Sunday.

## 3 Schedule

These are the times that were selected in the meeting details on the group page. If a time is missing, then those groups or locations don't have details with that schedule.

## 4 Locations

AKA Named Locations. These are all the locations that are added to the meeting details of the group.

## 5 Source of People

Determines where the list of people come from. The group itself, an alternative group or even a data view. When `Scheduling Must Meet Requirements` is enabled on the Scheduling Tab in the *Group Settings*, the alternative groups are disabled.

## 6 People

The people list shows everyone in the list. This shows if they are available

or if there is a scheduling conflict. Use the search bar to search for specific individuals in a long list. If the individual isn't in your list, click on the [+] button in the top right to enable the person picker.

**7 Location Grid**

This is where you place people into locations. Choose which locations are shown by the check boxes on the Location section.

**8 Status Bar**

Shows the confirmed and unconfirmed status of the room at that time. If someone declines it will be subtracted.

**9 Send Now**

Sends everyone in a room a scheduling confirmation request, allowing them to respond "yes" or "no" to the position if they haven't already responded to an email with the same request.

**10 Auto Scheduler**

Based off of individual preferences, when this button is clicked it will place them in their desired group and time if it is currently listed and if spots need to be filled.

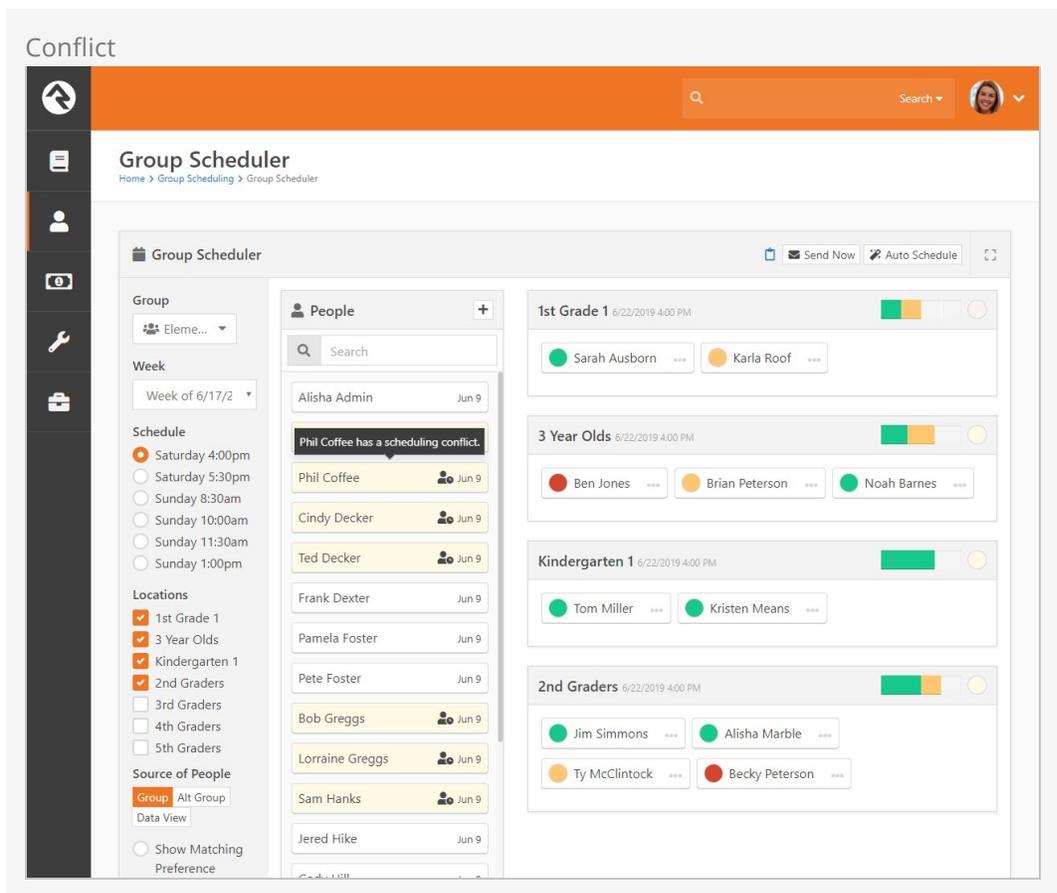
## Auto Schedule Vs. Manual Schedule

Auto scheduling works based on the `preferences` set by volunteers. In both an individual's My Account page on the external site, and on the groups page on an internal site person profile, there is a scheduling toolbox. These are the same, connected toolboxes so whatever a person sets on their external account will appear on the internal site for administrators to view. Sometimes a verbal conversation will happen about someone's preferences so a staff member can manually set that on their profile for them - whatever works for your organization, you can do.

So how does the auto scheduling feature work? Well, it involves some complex logic, and thankfully we already figured that all out for you, so sit back, relax and we'll take a brief look at an example.

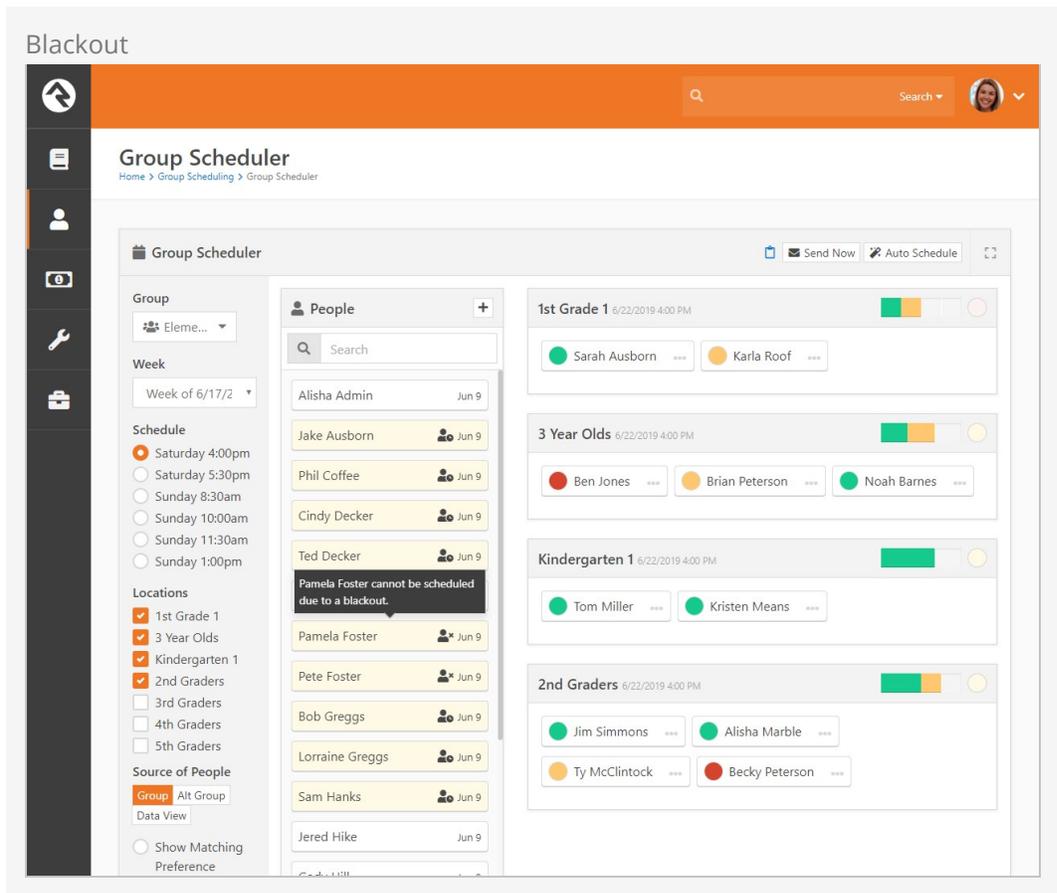
We all know those multi-talented people who can greet everyone at the door, run the lighting console and keep the attention of 10 three-year-olds for an hour, so naturally they set their preferences to every service, in every group which is a huge blessing. Only problem is how do you avoid double booking this individual?

This is how Rock solves that conflict: If you're using the same schedules to represent the same time frames, (which we know they are from the foundation of your schedule configuration), then the auto scheduler won't schedule the same person twice. Auto scheduling scans the person's preferences and sees that they are not assigned anywhere so the first time a staff member clicks on auto schedule it will always pull them first. Once someone has been scheduled for a time and location, they will be marked with an icon on other lists indicating they are scheduled elsewhere.



Manual scheduling is in the name. It's physically placing people into their serving locations. If we are being realistic here, we know there are going to be those few people who never get around to setting their preferences, so in those cases you'll have to manually place them. We know you know each and every one of your volunteers' time and location preferences, so this isn't a big deal anyway.

There are a few things to take note of. When people have a blackout date, they cannot be auto or manually scheduled, but they will appear in the list with an absent icon by their name. Furthermore, if someone has a scheduling conflict, you could manually place them into a group and send them a request. In most cases you wouldn't want to do that since they're committed elsewhere, and pulling someone away from another location they've already accepted can cause confusion for the helper.



If you have multiple sites that are close enough to each other that some people volunteer at more than one location, you will run into a scheduling conflict that doesn't appear as one if the locations have different schedules. For example, one site might have a 4:30pm and 6:00pm schedule while the other only has a 5:00pm schedule. If someone was already scheduled for the 5:00pm time, Rock would not see that they are elsewhere on the people list for the other site since the schedules are different.

**Note:**

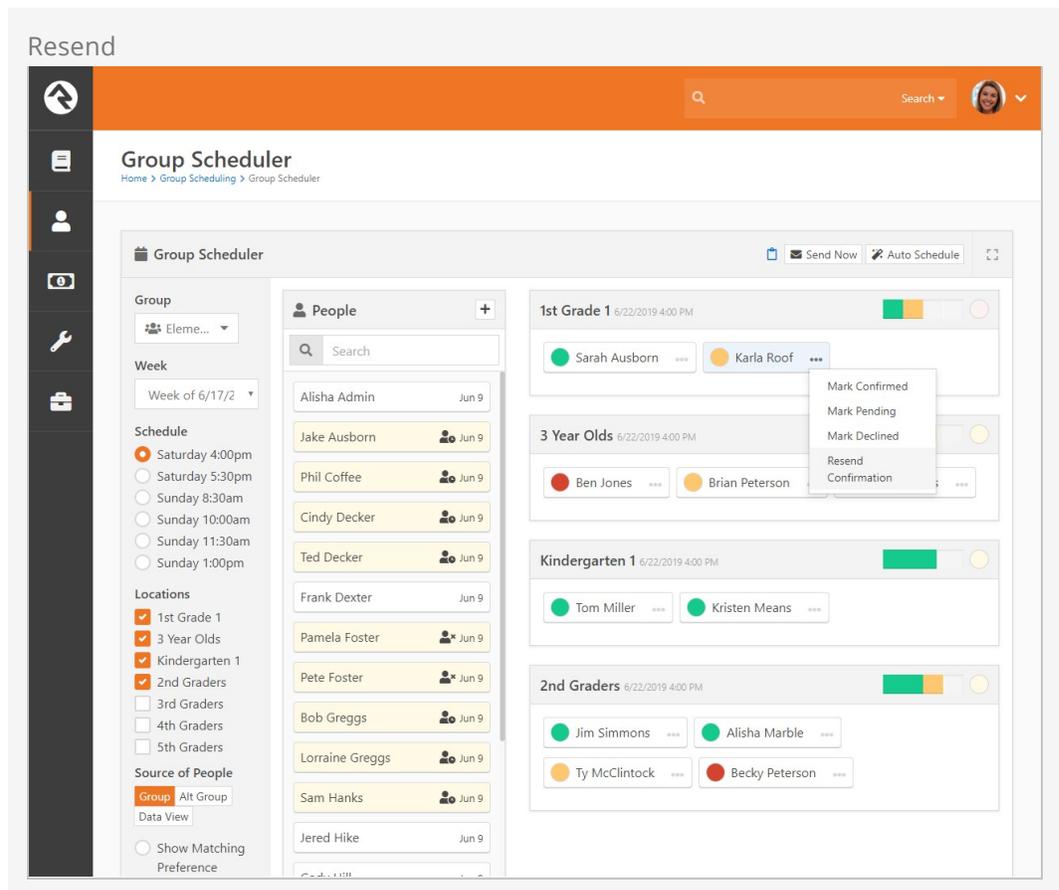
If both sites have a 4:30pm and 6:00pm schedule, make sure those schedules in your meeting details are the same for all groups. There is no need to have location specific 4:30pm schedules in the schedule tree.

## Confirmation Email

You will typically send a mass email once you have your teams set up for them to accept or decline. Click on the **Send Now** button.



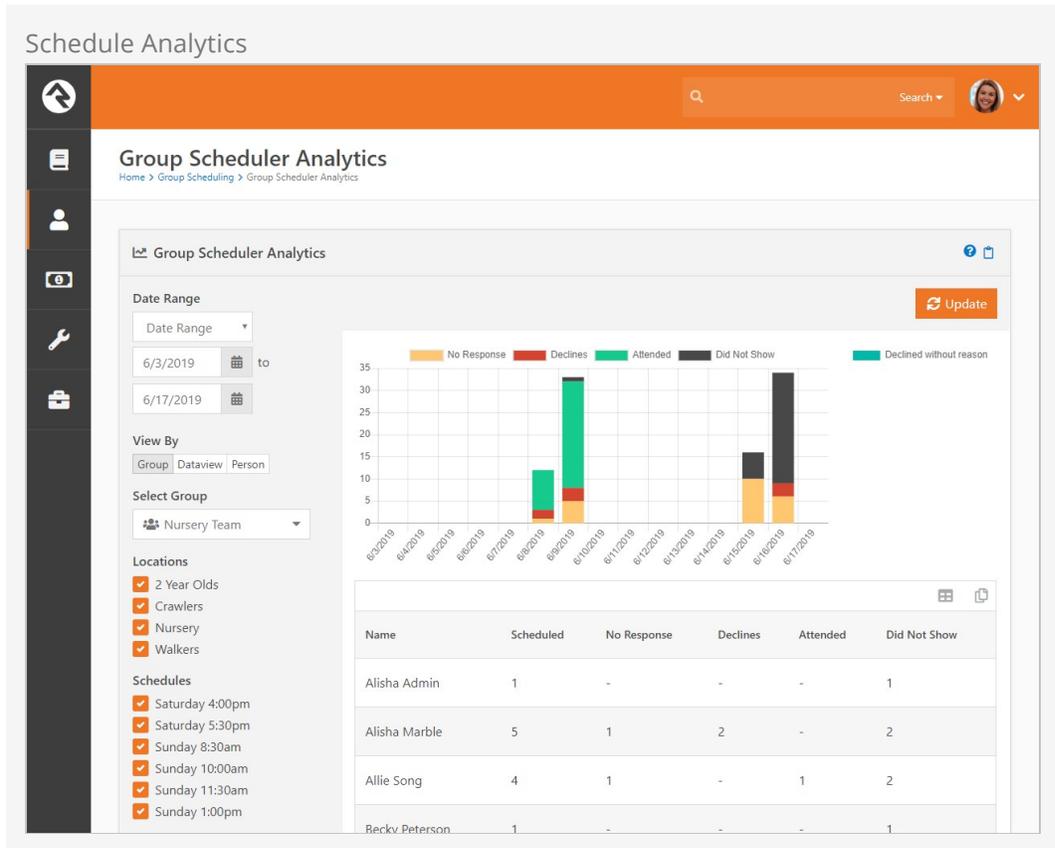
Alternatively, you can send an individual an email to accept or decline by clicking on the three dots near their name. This opens a drop down list of options where you can choose the `Resend Confirmation` button to send the email to confirm or decline again.



## Schedule Status Board

The status board gives you a bird's-eye view of the rooms and times which shows what is covered and what is still needed. The block settings allow you to choose a parent group to filter out any unnecessary groups showing in the select groups list. The `dates` button opens a slider bar to choose how many weeks to show at a time.





## System Emails

We have schedule confirmation request and reminder system emails already set up for you, which are of course customizable to fit your organization's lingo. Just like all system emails, you can view and modify them under [Admin Tools > Communication > System Emails](#).

## Jobs

Rock will send out confirmation and schedule emails based on the values you set on the Group Type Detail page. By default, these emails will be sent at 4pm. If you want to change the sending time, you can edit that time in the "Send Group Schedule Notifications" job, which can be viewed under [Admin Tools > System Settings > Jobs Administration](#).

# Group Blocks

By now you've seen the power of groups in Rock. Hopefully, you're starting to see all the different ways they can bend and flex to meet the demands of your organization. The real power is when you break free to see *what is* and start to comprehend what *could be*. While we've attempted to *pre-configure* groups with some standard best practices, you shouldn't limit yourself to what is configured out of the box.

The best way to see what's possible is to understand what group blocks are available in Rock. Start thinking of these blocks as your own box of Legos. How you arrange and build with these blocks is limited by your imagination. If you're unfamiliar with blocks and how to add them to a page, take a minute and read about them in the [Designing and Building Websites using Rock](#) guide.

## Group List

Like its name suggests, *Group List* block lists all groups that match a specific filter. The power of this block lies within its block settings. They allow you to:

- **Include Groups Of Type:** Specify which group types to include in the list.
- **Exclude Groups Of Type:** Specify which group types not to show in the list.
- **Detail Page:** The page you would like to navigate to when someone selects a group from the list.
- **Limit to Security Groups:** Remember that security groups are a bit special. While there is a group type for security groups, any specific group can be configured to act as a security group. This setting shows groups that meet any of these criteria.
- **Display Filter:** Determines if the filter panel should be displayed above the list.
- **Display XYZ Column:** This block also has several block settings to hide or display columns for displaying group type, group description, active status, group member count and system status.

Below is an image of a sample group list.

### Group List Block

**Group List**  
Home > Group List

Name	Description	Members	System
Adults Group		0	
Alisha Marble's Group	Small group topics involve studying the women of the Bible.	3	
ASU Student Group	We hang out and study the bible in an informal way.	2	
Decker Group	Small group with Ted as the group leader.	4	
Gilbert Group	We're reading through The Story and discussing each chapter.	6	
Greggs Group	We're reading through The Story and discussing each chapter.	7	
Marble Group	A general Bible study group perfect for people who are new to Christianity. We meet near W Cactus and 31st Ave.	12	
Pete's Group	Small group bible study group.	4	

50 500 5,000 8 Groups

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## Group Tree View

The *Group Tree View* block is very similar in configuration to the *Group List* block except that it displays the groups in a hierarchical tree view. Below is a sample of what this block would look like.

### Group Tree View Block

**Group Viewer**  
Home > General Groups

**Add Group**

- Global Connector Group
- Serving Teams
- Small Groups
- Ushers
- General Groups**

**General Groups** (General Group)

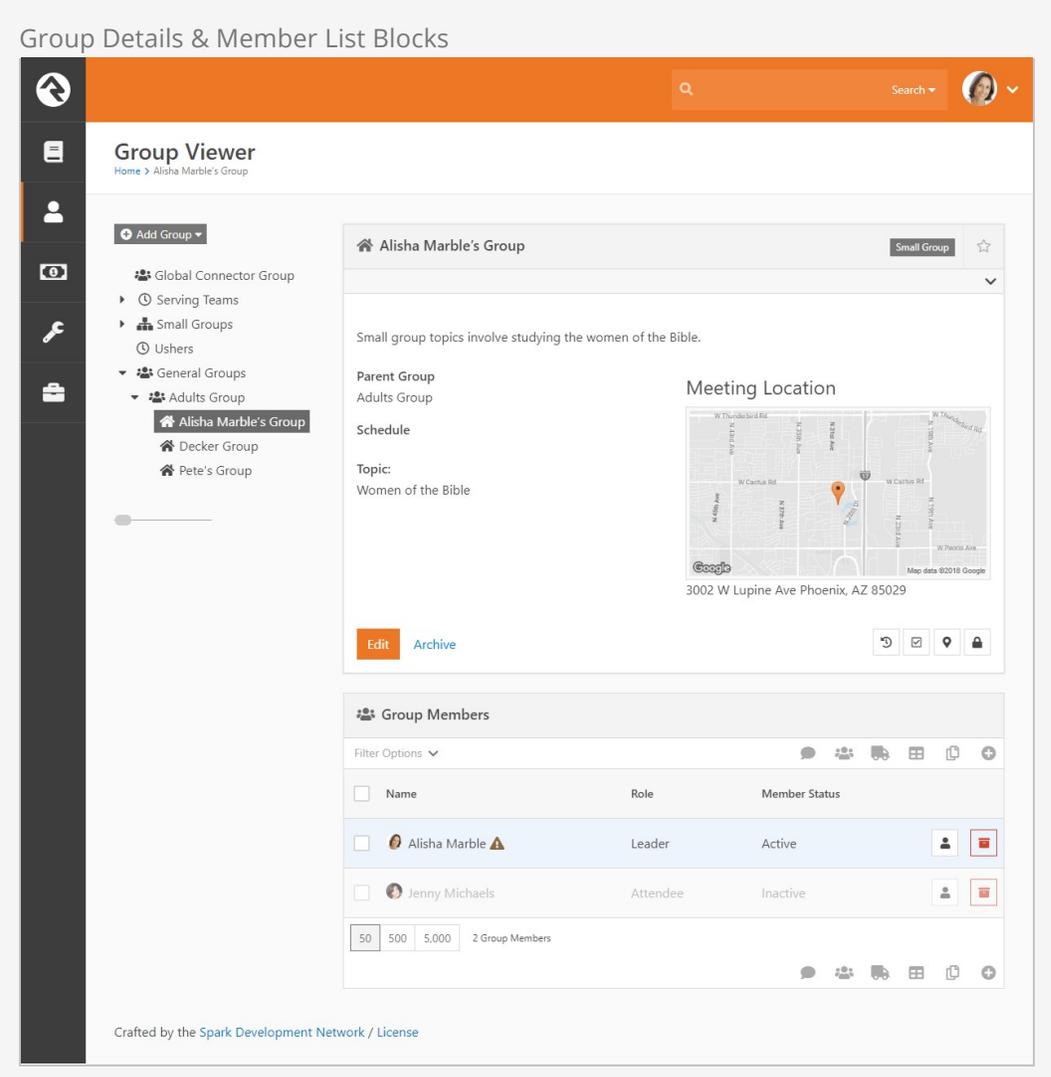
Parent group for all general groups

[Edit](#) [Delete](#)

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## Group Details / Group Member List / Group Member Details

While these are three different blocks they are usually used together to fully display the contents of a group with the ability to edit.



The screenshot displays the 'Group Viewer' interface for 'Alisha Marble's Group'. The interface includes a sidebar with navigation options, a main content area with group details, and a member list table.

**Group Viewer**  
Home > Alisha Marble's Group

**Add Group**

- Global Connector Group
- Serving Teams
- Small Groups
- Ushers
- General Groups
  - Adults Group
    - Alisha Marble's Group**
    - Decker Group
    - Pete's Group

**Alisha Marble's Group** Small Group

Small group topics involve studying the women of the Bible.

**Parent Group**  
Adults Group

**Schedule**  
Topic:  
Women of the Bible

**Meeting Location**



3002 W Lupine Ave Phoenix, AZ 85029

Edit Archive

**Group Members**

Filter Options

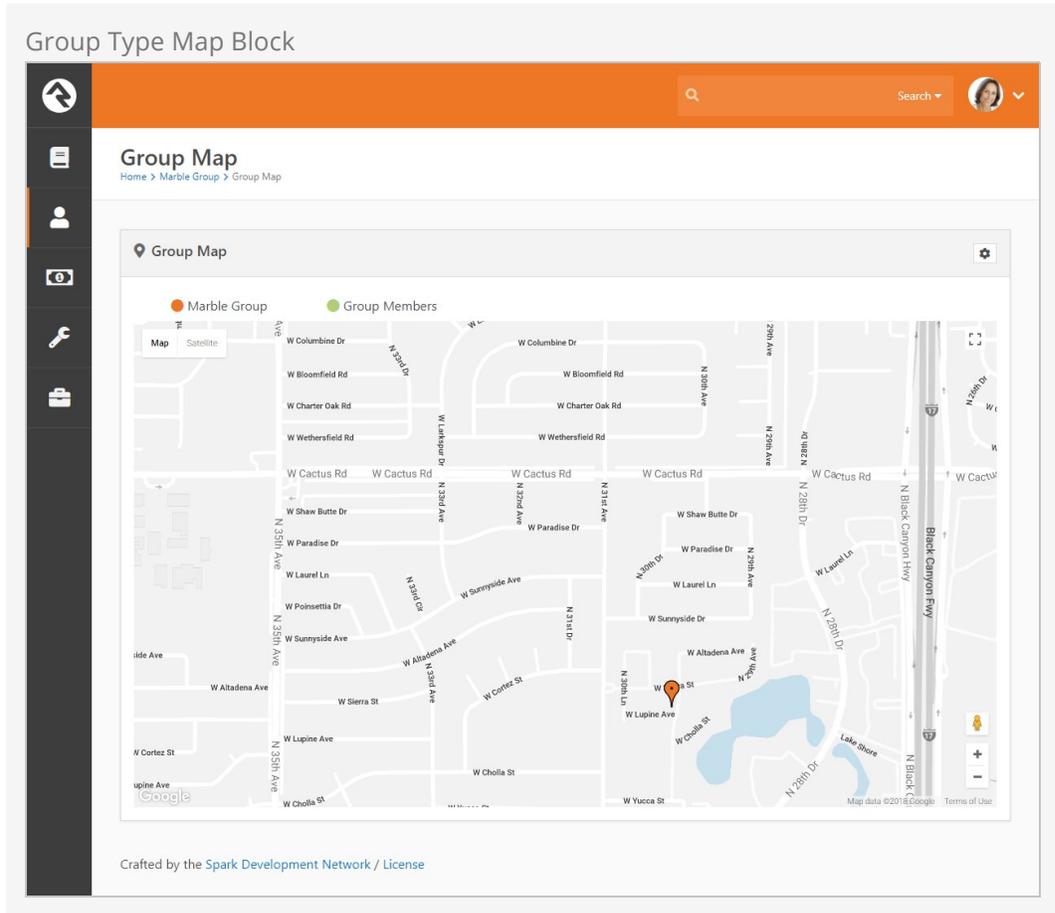
<input type="checkbox"/>	Name	Role	Member Status	
<input type="checkbox"/>	Alisha Marble	Leader	Active	
<input type="checkbox"/>	Jenny Michaels	Attendee	Inactive	

50 | 500 | 5,000 | 2 Group Members

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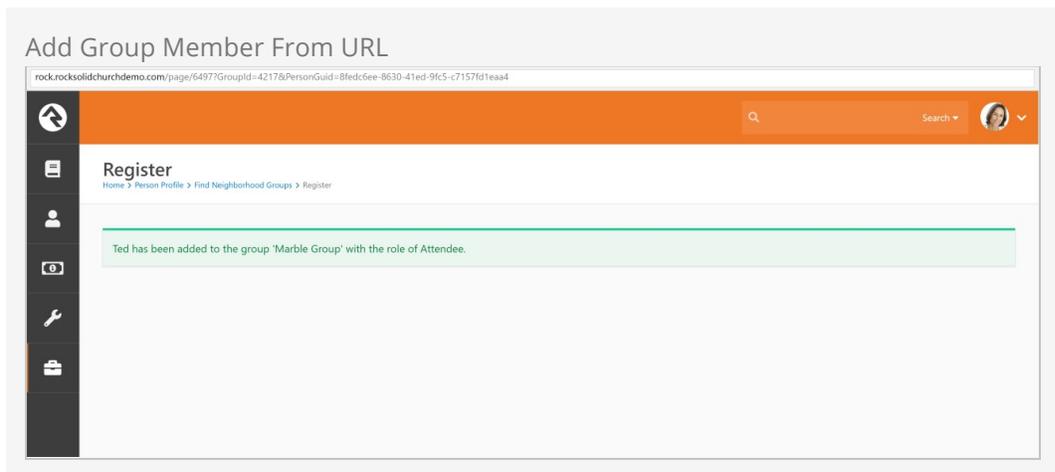
## Group Type Map

The *Group Type Map* block maps the location of every group of a specified type. While not included on a page out of the box, this is a very powerful block for mapping all of your small groups. Small organizations could even use it to map all the families in the database (remember families are groups too). Below is a sample of this block in action.



## Group Member Add From URL

Say what? OK, this is easy... this block when passed a PersonGuid and GroupId through the query string will add the person to the group and display a Lava template of your design. This is very useful in crafting various group registration scenarios. To get the juices flowing think about all the things you could do with this using the *Dynamic Data* and *Group Finder* blocks. There you go!



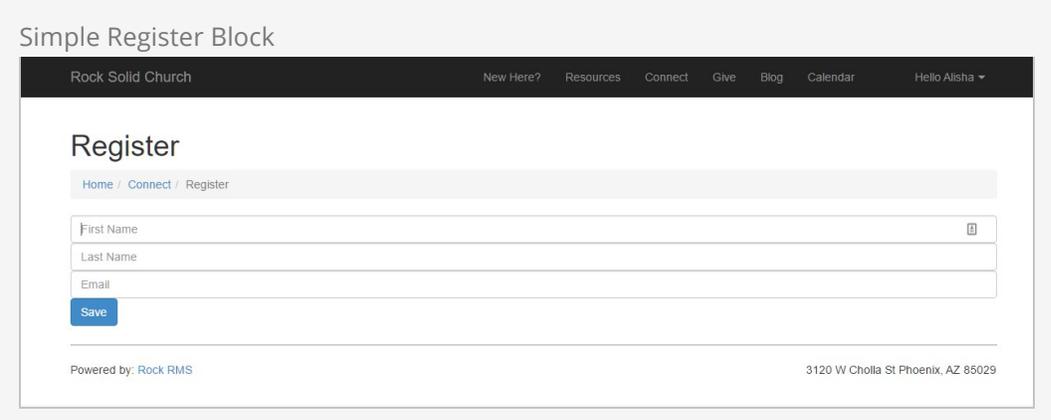
## Group Member Remove From URL

This block is just like the Group Member Add From URL block - but the opposite. It takes

a PersonGuid and GroupId through the query string and will remove the person from the group and display a Lava template of your design. This allows you even more flexibility in creating group registration situations. Alright!

## Group Simple Register

This block is another block that's handy for registration scenarios. It provides a simple form that accepts a first name, last name, and email address, registers the person to a group, and then forwards them on to a confirmation page. This block is most useful when it's used on an external facing site as a simple first point of contact but is flexible enough for many other scenarios!



The screenshot shows a web page titled "Simple Register Block" for "Rock Solid Church". The page has a dark navigation bar with links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", and a user profile "Hello Alisha". The main content area is titled "Register" and includes a breadcrumb trail "Home / Connect / Register". The registration form consists of three input fields: "First Name", "Last Name", and "Email", followed by a blue "Save" button. At the bottom of the form, it says "Powered by: Rock RMS" and "3120 W Cholla St Phoenix, AZ 85029".

## Simple Register Confirmation

This block is designed to pair with the Simple Register block as a confirmation page. When a user is redirected to this page it provides either a success or a failure message. It's that simple!

## Group Registration

This block is the big brother of the Simple Register block. This block takes a GroupId as a query parameter for context and allows you to do a few neat things like fire off a workflow when a user registers and use Lava options to format the registration form. It also has a full mode that takes down address details and phone details and a full with spouse -- which does exactly what you might expect. Use this mighty block when you want to get more than your standard information about a person or when you want to use a specific workflow process for your registrants.

## Group Registration Block

Rock Solid Church New Here? Resources Connect Give Blog Calendar Hello Alisha ▾

### Register

[Home](#) / [Connect](#) / Register

Sign up for Decker Group

**First Name \***

**Last Name \***

**Home Phone**

**Cell Phone**  
  Enable SMS

**Email \***

**Address Line 1**

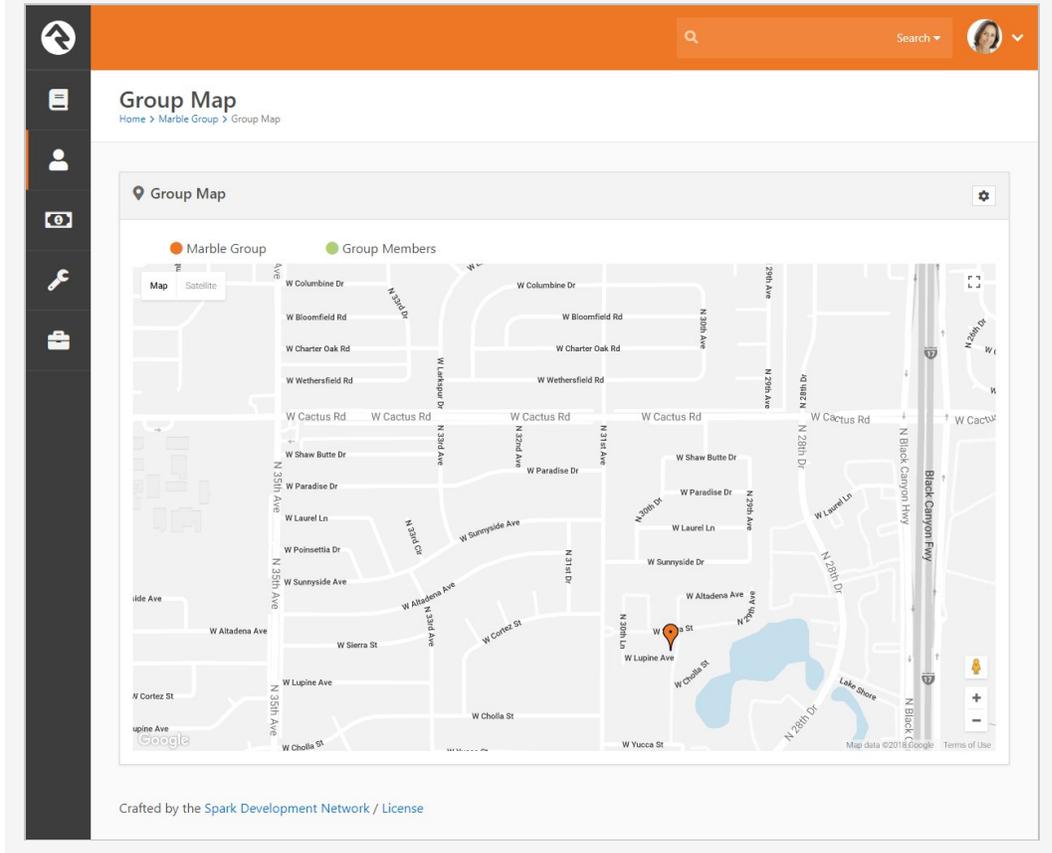
**Address Line 2**

**City**  **State**  **Zip**

Powered by: Rock RMS 3120 W Cholla St Phoenix, AZ 85029

## Group Map

The *Group Map* block maps the members of a specific group that is passed through the query string (aka passed in through the address of the page `http://server.com/page?GroupId=12`). While this block isn't too powerful on its own, it can be very helpful when used in conjunction with other blocks like the *Dynamic Data* block. Below is a sample of what this block looks like with with a sample group.



You'll notice two sets of checkboxes on this block. These allow you to map various groups and families that live in these areas. Below is a description of how and when these checkboxes will appear.

#### Group / Group Member Checkboxes (top left)

- If the selected group has a valid geoint, or geofence location, that group's name will be displayed as a checkbox option in the upper left which can be used to toggle the display of the group. The group will be displayed on the map either as a marker or a polygon depending on whether the selected group had a geoint or geofence. The color of the marker or polygon is determined by the first color specified in the *Colors* attribute of the selected mapstyle defined value. Note: this option will not appear if the selected group does not have a geoint or geofence defined.
- A *Groups* checkbox will be displayed if the selected group has any child groups with a valid geoint or geofence location. The child groups may also be either a marker or a polygon. The color of markers is determined by the second color specified in the *Colors* attribute of the selected mapstyle defined value. The color of polygons is determined by the *Polygon Colors* block setting.
- A *Group Members* checkbox will be displayed if the selected group has any members with a valid geoint location. The checkbox will toggle the display on the map of those members. Note, if the selected group is displayed as a polygon,

these members may or may not be within the boundaries of the polygon. The color of the markers is determined by the third color specified in the *Colors* attribute of the selected mapstyle defined value.

#### **Connection Status Checkboxes** (top right)

- If the selected group has a geofence location and is displayed as a polygon on the map, then the block will also display a list of *Connection status* checkboxes to toggle the display of families whose locations fall within the boundaries of that polygon.
- The connection statuses that will be included as checkbox options are determined by the Connection Status Defined Values. Only those defined values that have a value specified in the *Color* attribute will be displayed. The color value is also used to determine the color of the markers.
- Only families with at least one active record will be included.
- If family members have different connection statuses, they will be ordered by the connection status defined value order, and the first connection status found will be used for the family. For example, if a family has a member and a visitor, the family will be displayed when the *Member* checkbox is selected.

# Service Jobs Relating to Groups

Service jobs allow you setup reoccurring tasks that run on a schedule you define. Below are jobs that relate to groups.

## Learn More

See the [Admin Hero Guide](#) for more information on setting up jobs.

## Send Attendance Reminders

This job sends reminders to group leaders to enter attendance. All individuals in the group with a role that has the 'Is Leader' setting will receive this reminder. A couple of key configuration options for this job are:

- **Group Type:** The group type that the reminders are for.
- **System Email:** The system email that you would like to use for sending the reminder.
- **Send Reminders:** By default, a reminder will always be sent the day the group meets. By adding values here you can configure additional reminders if the attendance has not been entered. For instance, entering 2,4 would send reminders 2 and 4 days after the group has met if no attendance has been entered.

## Group Leader Pending Notifications

This job allows you to notify group leaders of newly pending members in their groups. This provides the following customization options:

- **Group Type:** The group type to filter off for limiting the groups that are checked for pending members.
- **Include Previously Notified:** This determines if only newly pending members should be emailed to leaders or if pending members who have already been sent once should also be considered. Note that when you initially set up this job, none of the current pending members will have been marked as sent, so they will all be emailed to leaders on the first run.

- **Notification Email:** This is the system email template that should be used. A sample one is provided out of the box for you to use or edit as you see fit.
- **Group Role Filter:** This is an optional setting that allows you to only include pending members of a specified role. If you don't select a role, all roles will be considered.

The email notification will be sent to all group members of the group whose role has been configured as *Is Leader*.

#### Keeping Your Options Open:

Keep in mind that you can set up multiple instances of this job. This allows you to send one scheduled email for newly pending members and a separate for older pending members that the group leaders have already been made aware of.

# Group Requirements

Group requirements allow you to place criteria on who should be allowed to be in a group. For instance, it's a pretty common feature that to be on a serving team around children you need to have an active background check. Administrating this need manually can be daunting, but with Rock why would you EVER consider doing it by hand?

Setting up group member requirements is a two-step process.

1. Define a Group Requirement.
2. Apply the requirement to each group that needs it.

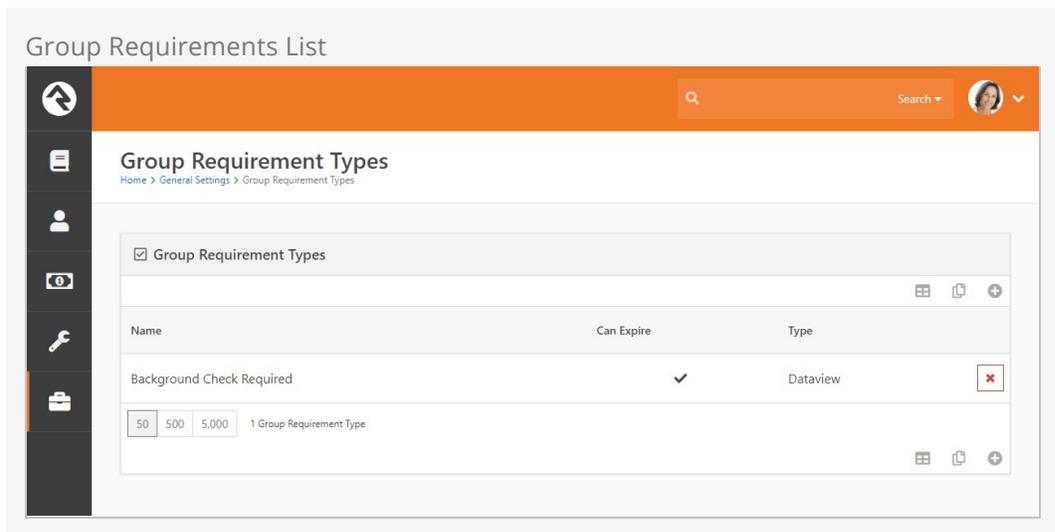
When a group member is checked to determine if they meet a requirement, the result will be one of the three conditions:

- **Positive:** The group member meets the requirement.
- **Negative:** The group member does not meet the requirement.
- **Warning:** Something in the middle. The specific definition of warning will depend on the configuration. For a background check, warning might mean that they have a passing background check, but it's about to expire.

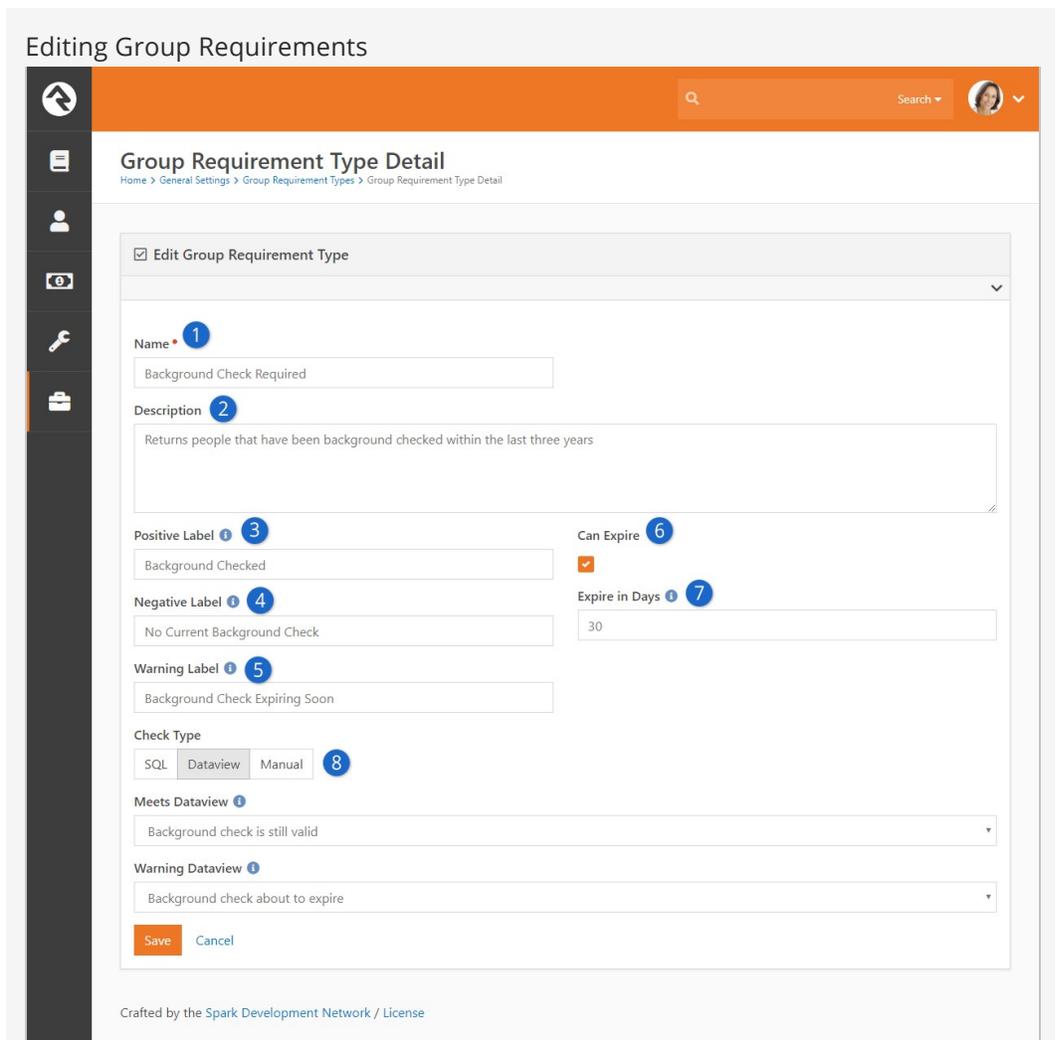
Group requirements can be set at the Group Viewer level, which applies member requirements to one specific group, or at the Group Type level, which applies the member requirements to all groups of a certain type. Both options are explained in detail below.

## Defining Group Requirements

You manage group requirements under `Admin Tools > General Settings > Group Requirements`.



Editing a requirement allows you to provide the following configuration options.



**1 Name**  
This is the name of the requirement.

**2 Description**

Be sure to provide a good description of the requirements and any of the underlying criteria that are used to determine whether a group member meets the requirement. A little documentation now will save you headaches in the future.

**3 Positive Label**

This is the label text that will be show when a group member meets the requirement.

**4 Negative Label**

The label used when a group member does not meet the requirement.

**5 Warning Label**

The label text that should be shown when the check meets the warning condition.

**6 Can Expire**

Some requirements, once met, will always be true - say for instance a requirement that you take a specific class before serving. Other requirements may expire. A good example of this is a background check or CPR certification.

**7 Expire in Days**

When a requirement can expire, you can set the number of days in the future to wait before re-checking the requirement. For something like a background check you don't need to look every day to see if the background check is still valid.

**8 Check Type**

So how do we determine the logic of whether someone meets a requirement? Rock gives you three options:

- **SQL:** In this case you provide a SQL statement. This statement should return a list of Person Ids in the database that meet that requirement.
- **Dataview:** You can also select a dataview that returns a list of all the people who meet the requirement.
- **Manual:** This requires someone to manually determines if a person meets the requirement.

You'll notice that the SQL and Dataview options give you a separate property to determine the warning state. You can leave this blank if your requirement doesn't have a warning state.

### Tips for Creating Data Views and SQL Expressions

When creating dataviews and/or SQL expressions for group requirements keep these two things in mind:

- **Meets** The dataview/SQL expression for meets should return a list of all the people in the database that meet this requirement.
- **Warning** This dataview/SQL express should return a list of all the individuals in the database in a warning state.

## Applying Group Requirements to Individual Groups

Once you have defined your requirement, you can apply it to groups. If you have *Administrate* access to a group you'll notice a panel on the edit screen entitled *Group Requirements*. You can add group requirements from this panel. There is also a setting to keep group members who don't already meet the requirements from being added to a group.

### Limited Restriction:

This restriction on adding group members only applies to manually adding people to the group. Workflow actions that add someone to a group will still be able to add people who don't meet the requirement to the group.

The screenshot displays the 'Applying Group Requirements' interface within a 'Group Viewer'. The interface is divided into several sections:

- Header:** 'Applying Group Requirements' title and search bar.
- Group Viewer:** Shows the current group being edited, 'Decker Group', with options for 'Small Group' and a star icon.
- Form Fields:** Includes 'Name' (Decker Group), 'Active' (checked), and 'Public' (checked) checkboxes. A 'Description' field contains the text 'Small group with Ted as the group leader.'
- Tabbed Interface:** Tabs for 'General', 'Meeting Details', 'Group Attribute Values', and 'Group Requirements' are visible.
- Group Requirements Section:** Titled 'Group Requirements for Group Type (From Small Group)', it contains a table with columns: Name, Group Role, Required For New Members, Can Expire, and Type. The table is currently empty, displaying 'No Group Requirements Found'.
- Buttons:** 'Save' (orange) and 'Cancel' buttons are located at the bottom of the form.

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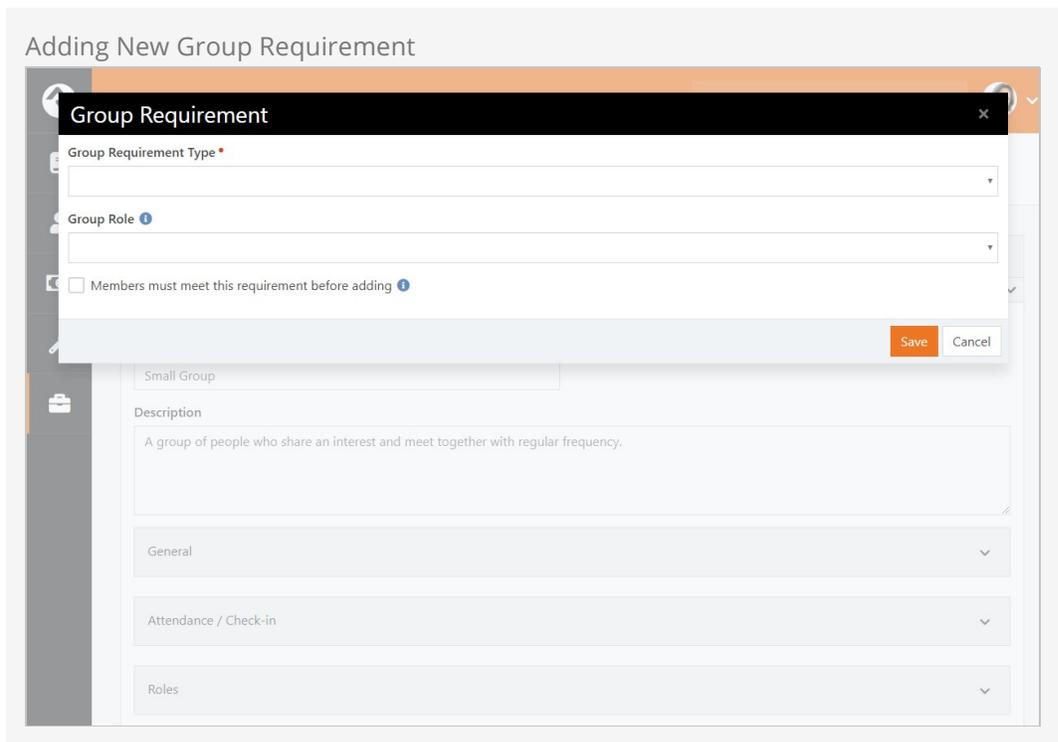
## Applying Group Requirements to Group Types

You can also set group member requirements at the Group Type level. This allows you to apply member requirements to all groups of a certain type rather than to each individual group.

Group Requirements Section - Group Type Detail Screen

Name	Group Role	Required For New Members	Can Expire	Type
Background Check Required	Leader	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dataview

To access your group types, go to `Admin Tools > General Settings > Group Types`. Select the group you want to add requirements to from the Group Type list. In the Group Type Detail screen, expand the Group Requirements section. From here you can either select an existing group requirement to edit or click the `+` button to add a new requirement.



## Viewing Group Requirements

Once you enable group requirements you'll notice in the Group Viewer that certain group members may have warning icons next to their names. This yellow icon denotes that the group member either does not meet the requirements or is in a warning state.

## Viewing Group Requirements

**Group Viewer**  
Home > Decker Group

**Decker Group** Small Group

Small group with Ted as the group leader.

Parent Group  
Adults Group

Schedule

Topic:  
Book of Genesis

**Meeting Location**

11624 N 31st Dr Phoenix, AZ 85029

**Group Members**

Filter Options

<input type="checkbox"/>	Name	Role	Member Status
<input type="checkbox"/>	Ted Decker	Leader	Active
<input type="checkbox"/>	Cindy Decker	Attendee	Active
<input type="checkbox"/>	Alisha Marble	Attendee	Active
<input type="checkbox"/>	Bill Marble	Attendee	Active

50 | 500 | 5,000 | 4 Group Members

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## Group Requirement Jobs

The Group Requirements features rely on two system jobs. These jobs can be configured under `Admin Tools > System Settings > Service Jobs`.

### Calculate Group Requirements

This job comes pre-configured and running in Rock. Every night it runs to check that all the group members met their requirements.

### Send Group Requirements Notifications

This job does not come pre-configured. You can configure this job to send a warning email to group leaders when a group member does not meet the requirements. These emails will go to group members whose role has been configured with the 'Receive Requirements Notifications' setting. This can be configured under:

`Administration > General Settings > Group Types`.

Below is a listing of settings for this job.

- **Notification Template:** This is the system email template that you want to use to format the email. Rock provides a sample email entitled *Group Requirements Notification* that's configured to meet most needs.
- **Group Types:** The group types you want to check the requirements on.
- **Notify Parent Roles:** This setting will notify the roles of parent groups of the group. This follows the hierarchy of the group structure all the way to the top. This ensures that top-level group leaders will receive notifications for all the groups under them.
- **Accountability Group:** The group you select here will get a listing of all group members not meeting requirements. Some might call this fascism but we prefer "inspect what you expect."

# Fundraising Groups

It's unfortunate, but sometimes it takes money to do good in this world. Whether it's money to pay the travel expenses of a mission trip or the small salary of an internship, costs can become a roadblock for many individuals. But when the community can be made aware of these needs, the burden of costs can be shared. The problem then becomes promoting the need and managing the transactions that are generated. Rock's fundraising features make quick work of both problems. Think of it as a mini Kick-starter just for your organization's needs! Let's dive in and see this feature at work.

Fundraising needs are stored as a new group inside Rock. These groups are created with the group type *Fundraising Opportunity*. This group type provides several group and group member attributes that will drive the fundraising features within Rock.

Each group will represent a specific type of fundraising activity. Examples include:

- A specific mission trip (e.g. *Summer China Mission Trip*)
- A specific type of fundraising (e.g. *Summer Interns, Fall Sports Season*)

## Fundraising Walk Through

Keep in mind that each fundraising opportunity is a group. You'll manage the opportunities from the Group Viewer.

Fundraising Opportunities

Group Viewer  
Home > China Trip

Add Group

- Fundraising Groups
  - China Trip
  - Global Connector Group
  - Serving Teams
  - Small Groups
  - Ushers
  - General Groups

China Trip Fundraising Opportunity

Parent Group  
Fundraising Groups

Opportunity Title:  
China Trip

Opportunity Date Range:  
6/18/2018 to 6/22/2018

Opportunity Location:

Opportunity Summary:

Opportunity Photo:

Opportunity Details:

Individual Fundraising Goal:  
\$1,000.00

Opportunity Type:  
Trip

Update Content Channel:

Enable Commenting:  
Yes

Registration Instance:

Allow Individual Disabling of Contribution Requests:  
No

Allow Individual Editing of Fundraising Goal:  
No

Cap Fundraising Amount:  
No

Financial Account:  
Mission Fund

Ok, but that's the boring part. Let's start looking at how these groups are displayed on your external site! Out of the box Rock configures several pages to view fundraising opportunities. The pages are displayed under the Missions pages (found under the Connect menu item). The missions page lists the various opportunities that are marked *Show Public*. Keep in mind that this block can be filtered by *Opportunity Type*.

## Missions

[Home](#) / [Connect](#) / [Missions](#)

[Children](#)

[Students](#)

[Adults](#)

[Prayer](#)

**[Missions](#)**

[Serve](#)

[Small Groups](#)

[Contact Us](#)

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### Upcoming Fundraising Opportunities



#### China Mission Trip

July 16, 2017 to July 22, 2017  
Beijing, China

A small team will be traveling to China to help support house churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This ten day trip will have a huge impact for the locals as well as those attending.

[View Details >](#)



#### Kenya Orphanage Building Project

October 29, 2017 to November 07, 2017

Travel to Kenya to help build and establish a new orphanage in a remote village. Once completed the team will welcome the kids into their new home.

[View Details >](#)

Selecting one of the opportunities will take you to its detail page. In the example below, Ted (who is leading this particular mission trip) is viewing the page. Since we know it's Ted, a summary of his Fundraising Progress is shown. Links are also displayed to take him to his participant's page and for him to make a payment. Also, note that since Ted is a leader for this opportunity, he has access to a leader toolbox.

This page is also used for the general public to view. It allows them to easily register for the opportunity if a registration instance was provided.

# Fundraising Opportunity Detail

Rock Solid Church New Here? Resources Connect Give Blog Calendar Watch Hello Alisha ▾

## China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [Fundraising Opportunity View](#) / [China Mission Trip](#)



**July 16, 2017 to July 22, 2017**  
**Beijing, China**

A small team will be traveling to China to help support house churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This ten day trip will have a huge impact for the locals as well as those attending.

[f](#) [t](#) [e](#)

[Donate to a Participant](#) [Trip Details](#) [Trip Updates \(2\)](#) [Comments \(1\)](#)

**Registration Open**

**Contact**  
Jenny Michaels  
jenny@rocksolidchurchdemo.com

**Registration Notes**  
A non-refundable application fee of \$50 is required to register for this trip.

[Register for China Trip](#)

30 spots available

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Powered by: Rock RMS 3120 W Cholla St Phoenix, AZ 85029

Fundraising Opportunitites can also optionally be configured with a Content Channel for providing updates. When configured, a new tab will be shown to display these updates.

# Fundraising Opportunity Detail

Rock Solid Church New Here? Resources Connect Give Blog Calendar Watch Hello Ted ▾

## China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [Fundraising Opportunity View](#) / [China Mission Trip](#)



July 16, 2017 to July 22, 2017  
Beijing, China

A small team will be traveling to China to help support house churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This ten day trip will have a huge impact for the locals as well as those attending.

[f](#) [t](#) [e](#)

**Donate to a Participant**

**Leader Toolbox**

**Registration Open**

**Contact**  
Jenny Michaels  
jenny@rocksolidchurchdemo.com

**Registration Notes**  
A non-refundable application fee of \$50 is required to register for this trip.

**Register for China Trip**

**Fundraising Progress** \$907.00

**Participant Page**  
**Make Payment**

[Trip Details](#) [Trip Updates \(2\)](#) [Comments \(0\)](#)

### Update 1 - A Big Day

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### Update 2 - We Arrive

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Another optional setting is to allow commenting on the opportunity. This tab will display a Rock notes control. Keep in mind that this feature currently doesn't allow for approving comments and does not email when new comments are added.

# Fundraising Participant Detail

Rock Solid Church      New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Ted ▾

## China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [Fundraising Opportunity View](#) / [China Mission Trip](#)



July 16, 2017 to July 22, 2017  
Beijing, China

A small team will be traveling to China to help support house churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This ten day trip will have a huge impact for the locals as well as those attending.

[f](#) [t](#) [e](#)

[Donate to a Participant](#)

[Leader Toolbox](#)

**Registration Open**

**Contact**  
Jenny Michaels  
jenny@rocksolidchurchdemo.com

**Registration Notes**  
A non-refundable application fee of \$50 is required to register for this trip.

[Register for China Trip](#)

**Fundraising Progress**      \$907.00

[Participant Page](#)  
[Make Payment](#)

[Trip Details](#)   [Trip Updates \(2\)](#)   [Comments \(0\)](#)

[+](#)

 Ted Decker   just now  
So glad for the opportunity to lead this trip!

[✎](#) [✕](#)

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Each opportunity participant has a personalized page that they can share with others to help generate interest and help encourage funding.

## China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [Fundraising Opportunity View](#) / Fundraising Participant



### Ted Decker's Trip

July 16, 2017 to July 22, 2017  
Beijing, China

[Copy Profile Link](#)

Help me make a difference on the other side of the world.



[Trip Page](#)  
[Edit Profile](#)

**Fundraising Progress** \$907.00

[Make Payment](#)

[Trip Updates \(2\)](#) [Contributions](#)

### Update 1 - A Big Day

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean ac dui posuere, placerat diam vel, rhoncus urna. Maecenas fermentum velit est, quis gravida lorem sollicitudin at. Duis elementum, tortor a sollicitudin pellentesque, dolor ex lobortis tortor, eu aliquam nulla magna vitae lacus. Ut molestie orci mauris, quis pretium eros euismod sit amet. Etiam tincidunt, arcu eu egestas scelerisque, elit odio consequat libero, cursus pulvinar sem nisi sed ex. Praesent dolor massa, malesuada sed mollis id, rutrum nec turpis. Cras turpis urna, egestas vel neque eget, eleifend auctor ligula. Praesent venenatis lacus ligula. Curabitur convallis commodo placerat. Nam dictum nisi magna, eu maximus nisi lacinia et. Etiam venenatis diam mattis congue placerat. Morbi posuere pretium nisi, commodo placerat lectus sagittis vel. Aenean tincidunt et massa ut gravida. Duis ornare augue at dolor egestas sodales.

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### Update 2 - We Arrive

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### Comments

[+](#)

Ted Decker · 21 hours a...  
Can't wait to start this trip!

Each participant can provide a custom opportunity introduction and edit their profile image from their personalized page. This block can also be configured to edit specific person attributes if you wish.

Fundraising Participant Profile

Rock Solid Church      New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Ted ▾

## China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [Fundraising Opportunity View](#) / Fundraising Participant

### Ted Decker's Profile for China Mission Trip

July 16, 2017 to July 22, 2017

**Photo**



[Save](#)   [Cancel](#)

**Personal Opportunity Introduction** ⓘ

Help me make a difference on the other side of the world.

---

**Facebook** ⓘ

[fb](#)

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If the person logged in is the participant, they can also view the gifts that have been given.

Fundraising Participant Transactions

Rock Solid Church      New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Ted ▾

## China Mission Trip

[Home](#) / [Connect](#) / [Missions](#) / [Fundraising Opportunity View](#) / Fundraising Participant



[Trip Page](#)

[Edit Profile](#)

**Ted Decker's Trip** [Copy Profile Link](#)

July 16, 2017 to July 22, 2017  
Beijing, China

Help me make a difference on the other side of the world.

[f](#) [t](#) [e](#)

**Fundraising Progress** \$907.00

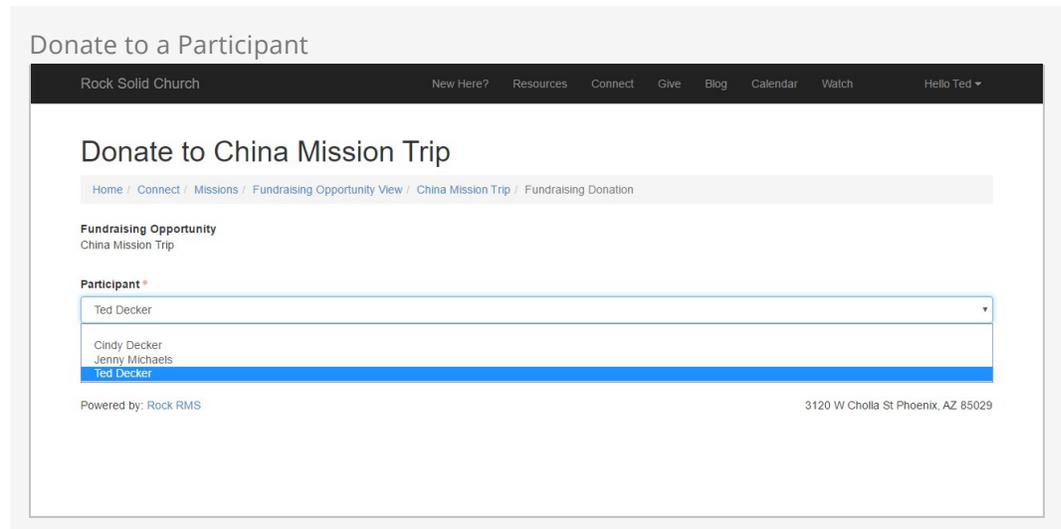
[Make Payment](#)

Trip Updates (2)   [Contributions](#)

Name	Address	Date	Amount
Ted Decker	11624 N 31st Dr Phoenix, AZ 85029	3/6/2017 12:00 AM	\$312.00
Frank Dexter	10623 N 18th Dr Phoenix, AZ 85029	3/6/2017 12:00 AM	\$60.00

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If someone doesn't have a link to a participant's profile page they can choose to give from the opportunity detail page and select the participant they would like to fund.



## Fundraising Opportunity Configuration

As we mentioned earlier, Rock's fundraising features are driven by a set of group and group member attributes. Let's take a look at these settings to see how you can customize each fundraising opportunity to meet your individualized needs.

Keep in mind the group and group member attributes below are specific to a single fundraising opportunity (each one is a group). This allows you to have several types of opportunities, each with their own unique settings and configuration.

### Group Attributes

Below is a detailed discussion of each setting for the group that represents the opportunity (Mission Trip, Internship Season, etc.)

Name	Type	Description
Opportunity Title	Text	The group name is mainly used internally. This attribute of <i>Opportunity Title</i> is what will show on the external site when opportunities are listed.
Opportunity Date Range	Date Range	Used to show the start and end dates of the opportunity. For a mission trip, we would recommend that you put the trip dates here. This date range doesn't control when the opportunity is shown externally; it just describes when the opportunity occurs.
Opportunity Location	Text	This is the location of the opportunity. For a mission trip, this would be the city or country. Feel free to leave this blank if it doesn't make sense in your situation.
Opportunity Summary	Memo	A brief description of the fundraising opportunity.
Opportunity	Image	If a picture is worth a thousand words, then we'd better

Name	Type	Description
Photo		include one.
Opportunity Details	HTML	Now we get to the nitty-gritty of what this opportunity is all about.
Individual Fundraising Goal	Currency	This field determines how much money each person is trying to raise. If each person in the opportunity is raising different amounts, you can provide those unique amounts on their group member attribute (discussed below).
Opportunity Type	Defined Value	<p>The opportunity type helps group-like opportunities. Rock ships with three options (<i>Trip</i>, <i>Internship</i> and <i>Project</i>). You can add your own under <a href="#">General Settings &gt; Defined Types &gt; Fundraising Opportunity Type</a>.</p> <p>This setting has two roles:</p> <ul style="list-style-type: none"> <li>• Acts as a filter for opportunities on the external website (e.g. show only mission trips on this list)</li> <li>• Provides a label to describe the opportunity type. For instance, should this opportunity be referred to as a <i>Trip</i>, <i>Project</i>, etc.</li> </ul>
Update Content Channel	Content Channel	You may want to provide updates on the status of your opportunity. For example, if your opportunity is a mission trip, you might want to file trip reports. Or if it's a project, you might want to provide updates on the overall funding level or project status. This setting allows you to configure a content channel to manage these updates. If you don't provide a channel the updates tab will be hidden.
Enable Commenting	Boolean	Sometimes you want comments, sometimes you don't. When enabled, a notes block will be added to the opportunity detail. Just remember that there is no automatic email when new notes/comments are left and no approval process. These features may be added in a future release.
Registration Instance	Number	This is what ties in a registration to the fundraising opportunity. You must provide the registration instance ID (currently there isn't a registration instance picker).
Registration Notes	Memo	This short description will show up on the opportunity details page to provide any quick notes about the registration (e.g. <i>A \$200 deposit is required</i> ).
Allow Individual Disabling of Contribution Requests	Boolean	Opportunity participants can have their own personalized fundraising pages. Some participants may want to use this page to share the opportunity and provide updates, but not want to communicate the financial needs. This setting allows you the option to allow them to disable the sharing of their funding status.
Allow	Boolean	This allows individuals to set their own fundraising goals

Name	Type	Description
Individual Editing of Fundraising Goal		from their external fundraising profiles. The default for this is not to allow editing.
Cap Fundraising Amount	Boolean	This setting determines if an individual can raise more money than their goal.
Financial Account	Financial Account	This configures which financial account the fundraising opportunity should use to track their money.
Show Public	Boolean	This flag determines whether the opportunity should be displayed on the external website. Since it's common for an opportunity to be displayed long before it starts, and for a brief time after it ends, this flag is used to determine when an opportunity should be displayed.

Since many of these attributes drive the external display of the opportunity, let's look at an example and where each value is shown.

Rock Solid Church      New Here?   Resources   Connect   Give   Blog   Calendar   Watch   Hello Alisha ▾

# 1 China Mission Trip

Home / Connect / Missions / Fundraising Opportunity View / China Mission Trip



2

3 July 16, 2017 to July 22, 2017  
Beijing, China 4

5 A small team will be traveling to China to help support house churches in Beijing. Travelers will also have the opportunity to work as English teachers at a small business school in the evenings. This ten day trip will have a huge impact for the locals as well as those attending.

6

7 Trip Details   Trip Updates (2)   Comments (1)

8

9 Registration Open

10 Contact  
Jenny Michaels  
jenny@rocksolidchurchdemo.com

11 Registration Notes  
A non-refundable application fee of \$50 is required to register for this trip.

12 Register for China Trip  
30 spots available

6

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1 **Opportunity Title**

2 **Photo**

3 **Date Range**

4 **Location**

5 **Summary**

6 **Details**

7 **Trip Updates**

8 **Comments**

9 **Registration Status**

This is determined by looking at the dates on the registration instance. If the registration is not yet open, the future opening date will be displayed.

10 **Registration Contact**

The contact comes from the Registration if it is configured.

11 **Registration Note**

12 **Spots Available**

This is calculated by looking at the number of registrant openings available for the registration.

### Group Member Attributes

The following group member attributes are available to help configure the

opportunities.

Name	Type	Description
Individual Fundraising Goal	Currency	This allows you to provide an individual goal that is unique to each person. This attribute is only available to the internal administrators and cannot be edited by the individual.
Personal Opportunity Introduction	Memo	This is a short message that the person can provide to provide a personalize note on their individual trip page.
Disable Public Contribution Requests	Boolean	This allows an individual to hide their name when listing people to fund. It also hides many of the features on their personal opportunity profile that are intended to encourage someone to give. This allows them to use their personal page to communicate updates if they are self-funding the opportunity.

## Fundraising Financial Transactions

Financial Transactions that are created from the fundraising features will all default to the *Contribution* type. The account for the transaction will be applied based on the opportunity group setting. It is possible to change the transaction type to a different value than *Contribution*. To do so, you'd need to create a new page with a *Transaction Entry* block on it. This block has a block attribute to set the transaction type on the advanced setting panel. You'd then need to configure your fundraising pages to use this new page for processing financial transactions.

In Rock, financial transactions can be tied to another entity (event registration, etc.). Donations that are made as a part of fundraising will be tied to the *Group Member* of the *Fundraising Opportunity* group. There is no financial linkage to registrations. This is an important point to understand as there is no way to link money coming in to a registration with that given as a fundraising opportunity. Below we cover several ways you can configure event registration to work with the fundraising tools for maximum impact.

## Financial Transactions Matching

We've already discussed that Financial Transactions for fundraising are Contributions that are tied to the Group Members of the Fundraising Opportunity Group. The Rock tools mentioned above do all of the connecting of the group member to the transactions. You might ask, "What about checks or gifts that need to be entered manually?" And that... is a GREAT question!

After entering contributions (either scanning and matching or through another process), you can link a contribution to a fundraising opportunity participant using the Fund Raising Matching block found under [Finance > Fundraising Matching](#)

**Fundraising Matching**  
Home > Fundraising Matching

Group Member Matching

Open Batches  
Online Giving ACH x

Person	Amount	Account	Transaction Type	Group Member
Jim Simmons	\$500.00	General Fund	Contribution	Group <input type="text"/>
Jim Simmons	\$100.00	Building Fund	Contribution	Group <input type="text"/>

Save

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## Fundraising Progress

You can quickly track the progress of fundraising campaigns for fundraising groups. Start by going to the *Group Viewer* page ( [People > Group Viewer](#) ). From this screen you can view the individual fundraising donations for each group member.

Fundraising Group

Search

⬅
☰
👤
📺
🔧
📦

## Group Viewer

Home > China Trip

Add Group

Fundraising Groups

China Trip

Global Connector Group

Serving Teams

Small Groups

General Groups

China Trip
Fundraising Opportunity
☆

---

Parent Group  
Fundraising Groups

Opportunity Title:  
China Trip

Opportunity Date Range:  
6/18/2018 to 6/22/2018

Opportunity Location:

Opportunity Summary:

Opportunity Photo:

Opportunity Details:

Individual Fundraising Goal:  
\$1,000.00

Opportunity Type:  
Trip

Update Content Channel:

Enable Commenting:  
Yes

Registration Instance:

Allow Individual Disabling of Contribution Requests:  
No

Allow Individual Editing of Fundraising Goal:  
No

Cap Fundraising Amount:  
No

Financial Account:  
Mission Fund

Show Public:  
Yes

Registration Notes:

Edit
Delete

### Group Members

Filter Options

	Name	Role	Member Status	
<input type="checkbox"/>	Ted Decker	Participant	Active	
<input type="checkbox"/>	Alisha Marble	Participant	Active	
<input type="checkbox"/>	Bill Marble	Participant	Active	

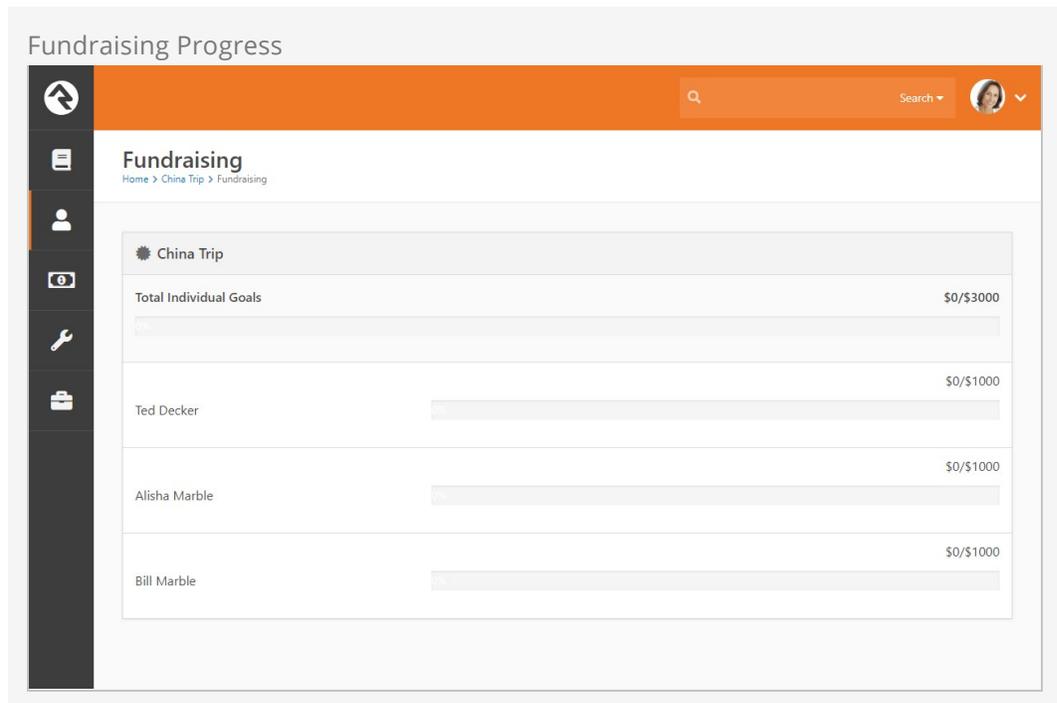
50 | 500 | 5,000 | 3 Group Members

### Fundraising Donations

No Donations Found

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You can also quickly view the group's overall fundraising progress. Click the  button to display a snapshot of both the combined and individual fundraising progress.



## How Registration Can Work with Fundraising

As mentioned above, Rock's registration and fundraising tools were meant to work together. That said, financial transactions from these two features don't tie directly together. Below are some use cases to show how you can get these two features to sing in perfect harmony.

### Basic Mission Trip

In a basic scenario you would create a new event registration to capture information about the trip participant and have the registrant drop directly into the fundraising group. To enable this direct link to the fundraising group, be sure you define a linkage on the registration instance to the group. The fundraising blocks are smart enough to use these linkages in the registration process.

#### Pro Tip

You can actually provide multiple linkages to have individuals drop into different groups. The linkage name will be used on the registration button on the fundraising page.

### Mission Trip with No Cost Application Process

Say you wanted to configure a mission trip in which a person needed to register and be approved before they could begin fundraising. You could use an event registration to take their application information. Once their application was approved, they would be

added to the *Fundraising Opportunity* group (using the group placement tools would help with this) and they could then start their fundraising. They would use the same *Donation* page to submit their own payments for the trip.

#### **Mission Trip with Required Costs Paid by the Participant**

Now let's say that the trip costs \$1,000 and that \$200 is due upfront and should be paid by the trip participant. Also, suppose that there is an optional post trip safari that a person could choose to add. In this case, you would setup an event registration for \$200 with an optional fee for the safari. You would then setup the *Fundraising Opportunity* group to have an *Individual Fundraising Goal* of \$800.