


PERSON & FAMILY FIELD MANUAL



A PRACTICAL GUIDE FOR MANAGING PEOPLE



Welcome

Welcome to the Rock field guide for managing people. Individuals and families are at the core of what we do. In this guide we'll look at the people-managing tools you'll find in Rock. We'll also dig a little deeper to give you a glimpse into how Rock stores information about individuals to help you best use Rock in your organization.

We Are Family

Every person in the database belongs to a specific *group type* called Family. It's impossible to add a person to the system without either creating a new family or adding them to an existing family. However, an individual isn't limited to membership in a single family. They can belong to many families, but they will always have at least one. Below we look at some of the other unique things about the family.

Addresses

Addresses are tied to the family, not the individual. There are several different types of addresses defined in Rock, and you can add more if you'd like. The ones that are available out-of-the-box include:

- Home
- Work
- Previous

Adding an Address Type

If you'd like to add a new address type, follow these steps:

1. Add a new group location type under:

`Admin Tools > General Settings > Defined Types > Group | Location Type.`

Be sure you select the `Group | Location Type` as there's also a `Location | Location Type`.

2. Add your new group location type to the Family group type under:

`Admin Tools > General Settings > Group Types.`

From this screen select the *Family* group type and add the new address type to the Location Types list in the *General* section.

Configuring Address Fields

If needed, you can make specific parts of an address required, optional or hidden.

Navigate to `Admin Tools > General Settings > Defined Types > Countries` and edit the entry for your country according to your needs.

Campus

If you're a part of a multi-site organization, the campus is also tied to the family. Interestingly, if a person is a member of two families that attend separate campuses,

the individual will be tied to two different campuses as well. This is a powerful pattern for blended families to use.

If you're not a multi-site organization then the campus is still tied to the family, but it's done behind the scenes. This is needed just in case a new campus is ever added.

Portrait of a Person

What Makes a Person

Before we start diving into the features, let's look at what makes up a person in Rock.

There are two main sources of data when looking at a person's record. First are the common data elements that are "hard-coded" into the system. These include basic fields like *First Name*, *Last Name*, *Email*, etc. These fields are common to all organizations, so they have been provided from the beginning of Rock and can't be removed.

Second, since every organization is different, Rock also allows you to add new data items to a person. We call these *Person Attributes*. You can add as many as you like, selecting a data type for each one. Common data types include:

- Text
- Date
- Number
- Dropdown of provided values (think of an attribute of T-Shirt Size with the values of S, M, L, XL)
- Boolean (aka, True/False, Yes/No)
- Document

While there are quite a few other data types you can use, those are the common ones.

Over time, your list of added attributes can become quite large. To help with this, we've provided the ability to group them into categories. You'll see these attribute categories later when we look at the *Person Profile* page.

Note

See your administrator to help define new person attributes and categorize them into groups.

Adding a Person

As you're getting started, one of the first things you'll want to do is add someone (perhaps yourself) to the database. While it might be intuitive to look for a menu item labeled "Add Person", you won't find one. Because people are members of families, you must start with adding a family. You'll find that under:

People > New Family.

Deleting a Person

While it might seem like a natural thing to do, deleting a person is not allowed in Rock. Why? The history of a person must be maintained for historical records to be accurate. Think about giving and check-in. If a person was deleted, you would lose their contributions and attendance information. Instead of deleting people, you can inactivate them in the database (more on how to do this later).

Let's look at some common situations where you might want to delete a record, and how to handle them in Rock.

Scenario: John Doe no longer attends and has asked to be removed from the database.

In Rock: You can consider John removed when he has been marked inactive. This should remove him from all future emails.

Note

When writing custom reports, be careful not to include inactive records.

Scenario: You added a duplicate record and want to delete the new one.

In Rock: Instead of deleting the record you'll need to merge it with the existing record. See the [Duplicates](#) section below on how to do this.

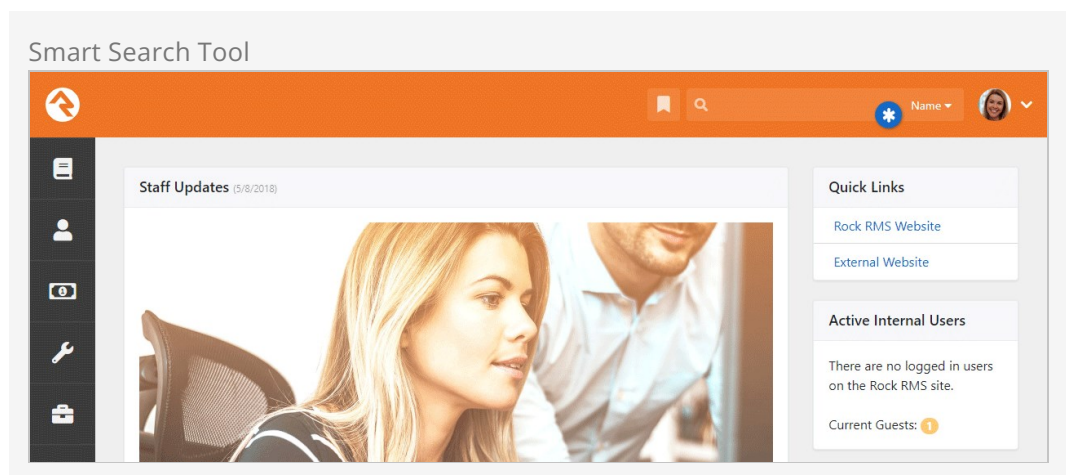
Scenario: You added a test record and now want to delete it.

In Rock: It would be best not to add test records to your production environment. You might consider creating a test environment that you can treat as a sandbox. If you added a sample record to your database, you have two options. The first option is to inactivate it like it was a normal person. The second would be to merge the record with an existing record.

Searching

Searching By Name

To find someone in the database, start by using the *Smart Search* tool found at the top of every page. This tool can be used to search several different types of data, but it defaults to searching for individuals by name.



When searching by name, it's important to know some tricks to improve the quality of your search and to save time. Keep in mind that you don't need to type a person's full name to search. You can type fragments of the name. Say, for instance, we're looking for Ted Decker. Here are several suggested ways we can search for him:

t decker
te dec
decker

Notice that none of these suggestions included "Ted Decker." That would be a waste of key presses. (Useless fact: the average key on a keyboard has a life cycle of only five million presses.) Because you make fewer spelling mistakes if you press fewer keys, it's always a good idea to shorten searches.

Also, notice in our samples above that we never searched for just "Ted." If you provide only one name, Rock assumes you're searching by last name.

But I'd Like to Search by Only First Name...

If searching by only the first name works for your organization, no problem. We have you covered. To enable searching both first and last names when only one term is provided go to:

[System Settings](#) > [Search Services](#) > [Person Name](#) and set *Allow Search by Only First Name* to "Yes".

Once you submit your search, you'll see one of two possible screens. If only one person matches your search, you'll be taken straight to the *Person Profile* page for that person. However, if more than one person is returned, you'll see a list of individuals. Select the correct one, and you'll be taken to their *Person Profile* page.

The screenshot displays the 'Universal Search' interface. At the top, there's a search bar with the text 'decker' and a 'Go' button. Below the search bar, the results are listed. The first result is 'Decker Group (Small Group)' with a description 'Small group with Ted as the group leader.' Below this, there are four individual profiles, each with a profile picture, name, email, address, connection status, age, record status, and campus. The last result is 'Ushers (Serving Team)'.

Name	Connection Status	Age	Record Status	Campus
Ted Decker ted@rocksolidchurchdemo.com 11624 N 31st Dr Phoenix, AZ 85029	Member	41	Active	Main Campus
Cindy Decker cindy@fakeinbox.com 11624 N 31st Dr Phoenix, AZ 85029	Member	40	Active	Main Campus
Noah Decker 11624 N 31st Dr Phoenix, AZ 85029	Attendee	1	Active	Main Campus
Alex Decker 11624 N 31st Dr Phoenix, AZ 85029	Attendee	10	Active	Main Campus

Rock has a sophisticated algorithm that helps you find names even if you can't spell them correctly. You may often see other possible matches at the top of your search results.

Other Recommended Results

Person Search
Home > Person Search

Other Possible Matches: Ted Decker

Person	Age	Connection Status	Record Status	Campus
No People Found				

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*** Other Recommended Results**

Searching by Phone

While not as common as searching by name, sometimes you may want to search for a person using a phone number. The *Smart Search* tool can also search by phone. Simply select the *Phone* option and type in the number.

Just like searching by name, you don't need to enter the full phone number to get results. You can enter any part of the phone number. (This is great for people who leave voicemails with rushed return numbers). If you were searching for the person with the phone number (623) 555-3322 (Ted Decker in our sample database), you could use any of the searches below to find him:

(623) 555-33
62355533
3322
555 3322

Note

The phone search will strip out any characters that aren't numbers before running the search.

Searching by Email

Yep, you guessed it: Rock can search by email using the *Smart Search* tool, too. Partial

searches are supported. We're sure you've got it by now, so we won't repeat the search details here.

Searching by Address

The address search is also similar to the other search types. Keep in mind, though, that it only operates on the street address portion (first line) of the address. Sample searches for Ted Decker would be:

11624 N 31st Dr
11624
31st Dr

Searching by Birthdate

You can also search for a person by birthdate. For this option to be available, it must first be enabled and configured in [Admin Tools > System Settings > Search Services](#).

Searching by Group Name

Much like searching by name, you can also search by Group Name using the *Smart Search* tool. You can type a specific name to locate a particular group (e.g., "Alisha Marble's Small Group"), or use a general term, such as "student", to display a list of all groups with that term in the name.

Searching by Business

You can search by business name using the *Smart Search* tool as well. Partial searches are supported.

Universal Search

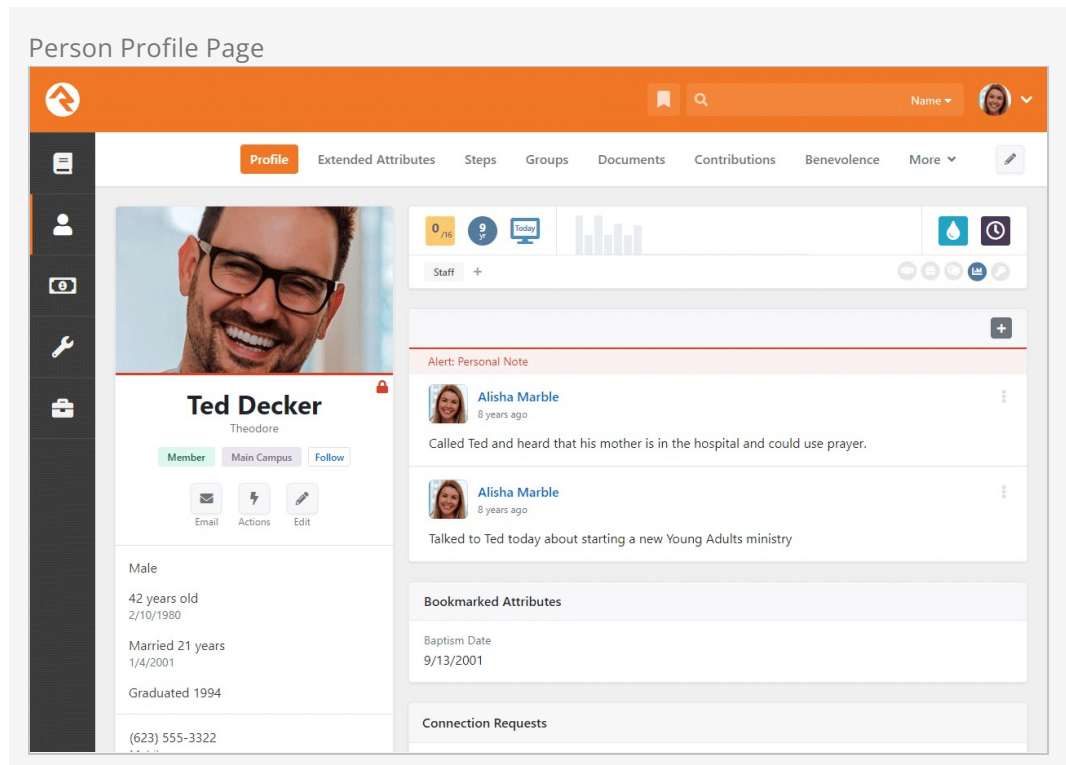
The *Smart Search* capability in Rock is quite powerful, but sometimes you may need more. That's where *Universal Search* comes in. *Universal Search* allows you to search multiple types of data at once in a full-text manner. In a sense, it's like Google for Rock. To learn the ins and outs of Universal Search, check out the [Universal Search](#) guide.

I Still Haven't Found What I'm Looking For

The *Smart Search* and *Universal Search* features should meet your needs in almost every case. If you need to search with even finer detail, you can write a quick *Data View* to find the person. See the [Taking Off With Reporting](#) guide to learn more.

Person Profile Page

The *Person Profile* page is by far the most used and powerful page in Rock. This one page gives you a detailed picture of a person's involvement in your organization and the relationships between people.

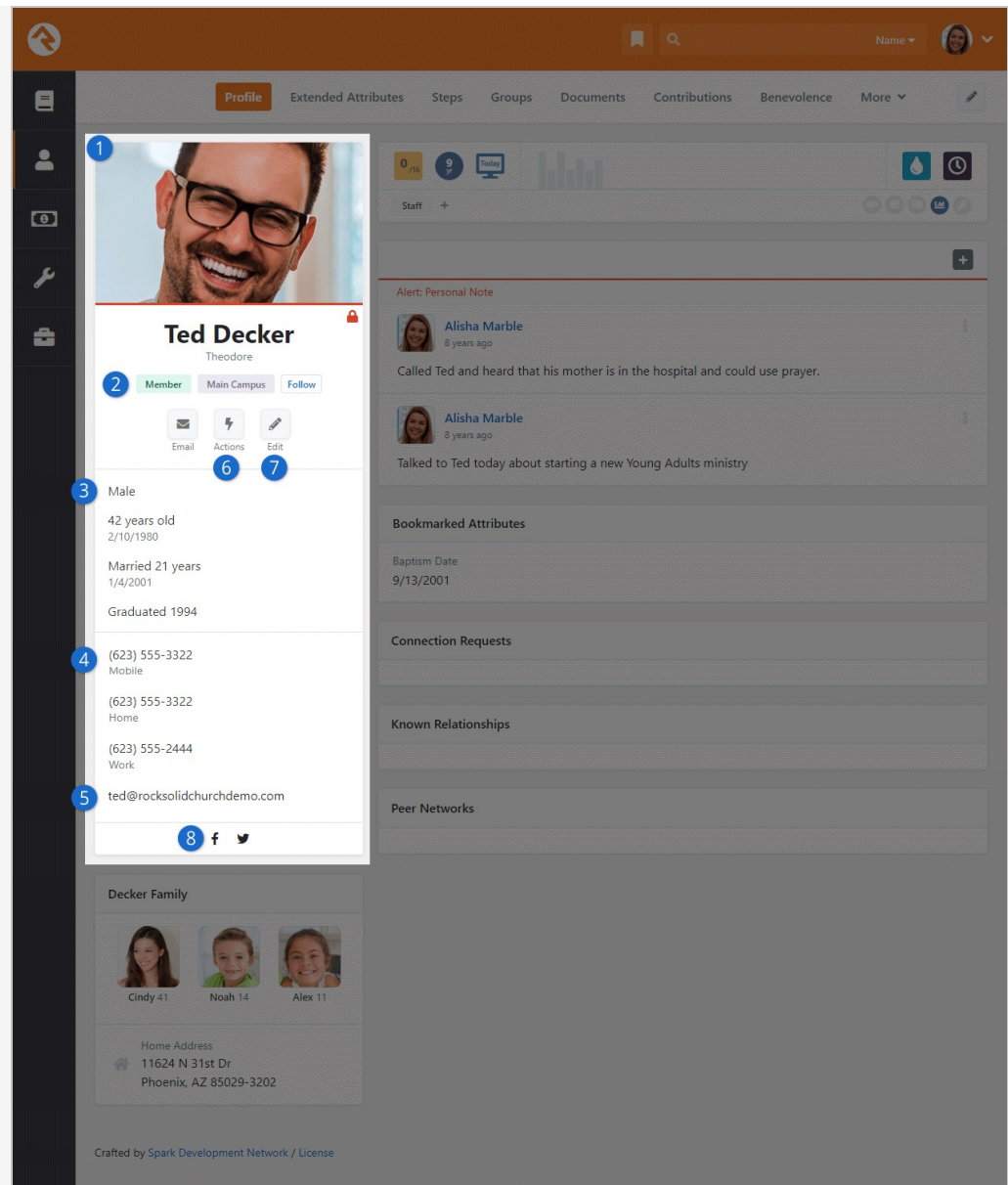


The page can be broken down into four main areas, which we'll discuss in detail below.

Person Bio

The *Person Bio* gives you details and contact information about the individual. Here's a breakdown of this section.

Bio Section



1 Photo

If a photo is available, it's shown here. If no photo is available, a gender/age appropriate silhouette image is shown.

2 Labels

Labels are a quick way of categorizing a person's involvement. After installation the following labels will be active on the page, but you can add custom labels.

- **Connection Status:** Member, Attendee, Visitor, Participant, Pending.
- **Campus:** Which campus the member's family attends. This label isn't shown if you only have one campus.
- **Record Status:** This label is only shown if the record is *Inactive* (i.e., they are no longer attending).
- **Account Protection Profile:** The small padlock icon below the profile picture references the person's Account Protection Profile level. You can control who can see this by editing the block's security.

Edit Security

If you'd like to control who can view the account protection profile you can do so by editing the block's security. Here you'll have the ability to allow or deny access to all users using the View Protection Profile. This allows you to protect the users Login, Finances and Staff Role Status.



3 Demographic Information

This includes age, gender and marital status.

4 Contact Information

This section contains phone numbers and the person's email address. Note that if the phone number has SMS enabled, you'll see a speech bubble icon. Also, if this page is loaded on a mobile device, the phone numbers will appear as links to enable 'Click-To-Call'.

5 Email Address

Clicking the email address will launch a new communication to the individual. You may also see icons next to the address noting the individual's email preferences. If they have asked not to receive bulk emails, you'll see a . If they have asked not to receive any emails the address will not be a link and the  icon will be displayed.

6 Actions

The action list allows you to launch workflows for the individual. See the [Blasting Off With Workflows](#) manual for details on creating custom actions for your organization. More details on the *Photo Request* action can be found in the *Photo Requests* section below. This list is also where you can download a person's vCard, or virtual business card, to store on another device, such as the contacts on your cell phone. Rock automatically generates a person's vCard based on the contact information provided on their profile.

7 Edit Link

The edit button allows you to edit the person's personal and contact information and gives you the advanced option of combining their giving with another person's.

8 Social Media Icons

The icons of any social media accounts that have been configured in the person attributes and completed for the individual will appear below the photo. For more information about configuring and editing a person's social media information, see the [Extended Attributes Tab](#) section below.

Note About Emails and SMS Phone Numbers

You are limited to entering only a single email and SMS phone number for an individual.

Extending the Person Bio

There are a lot of options available in the *Person Bio* block settings that allow you to customize the *Person Profile* page. For example, you can use the *Additional Custom Actions* field to add buttons, link to workflows or add personalized content, or the *Custom Content* field to add almost any content you wish that is not in the core Bio block.

NOTE: When using the *Custom Content* area, you need special "context" syntax. For example, to display a Person Attribute here, you would use

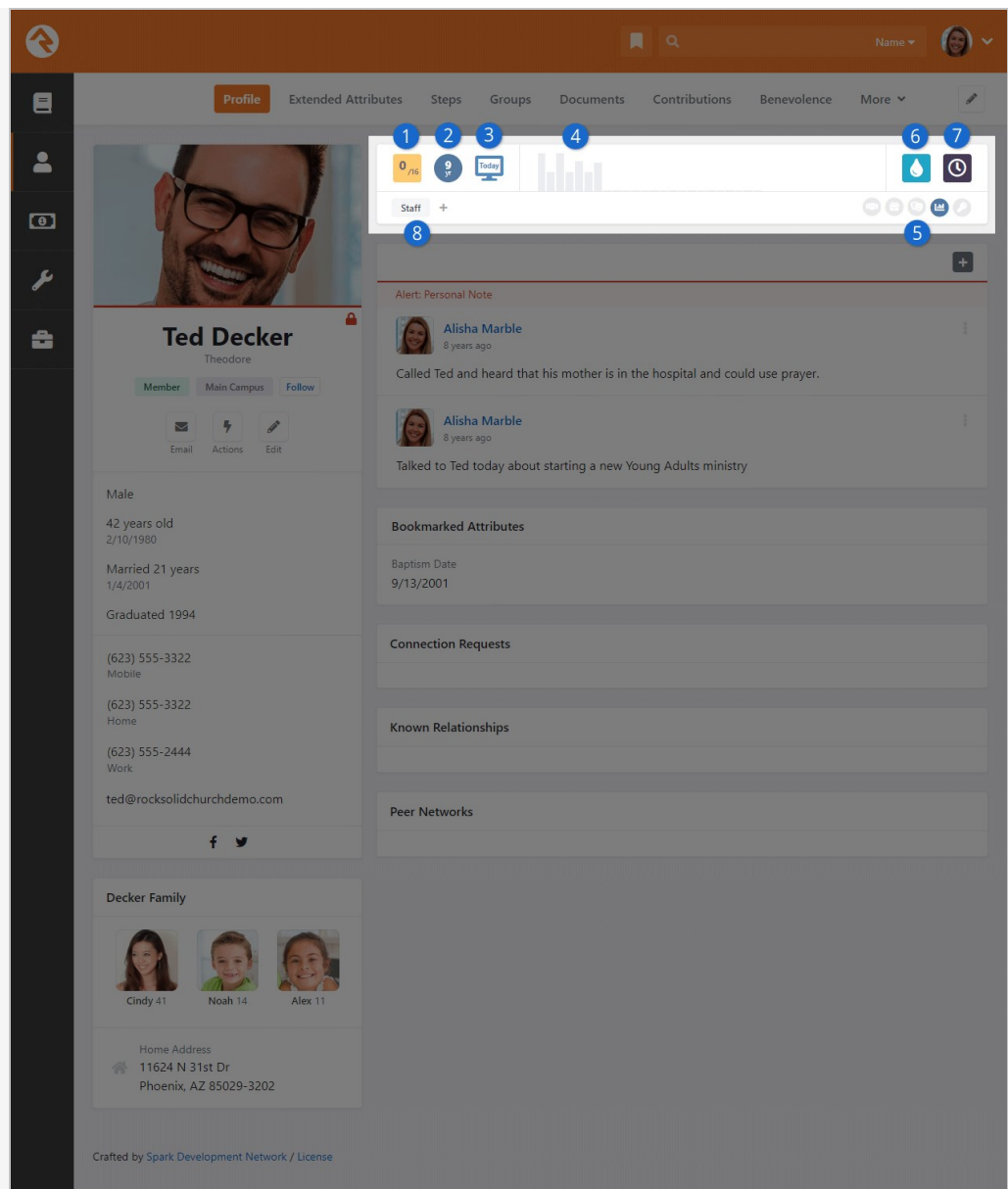
```
{{ Context.Person | Attribute: 'AttributeKey' }}
```

The possibilities are endless. Be sure to explore these powerful options and consider how you might use them to create a unique profile page that meets the needs of your organization.

Badge Bar

The next section is what we call the *Badge Bar*, with icons (i.e., badges) indicating a person's activity. While Rock comes preconfigured with several badges, you can add more. For more information on badges, including how to create new ones, see the Badges chapter below.

Badge Bar



- 3 16 Week Attendance**
 The *16 Week Attendance* badge will show how many times the family has attended (e.g., checked in children, serving team participation) over the past 16 weeks.
- 2 Attending Duration**
 The *Attending Duration* badge shows you how long the individual has been a part of the organization.
- 3 Last Visit on External Site**
 This badge shows you how long it's been since the person last visited your external website.
- 4 Family Attendance**
 This chart gives you a wider picture of the attendance patterns over the last 24 months. Each bar represents one month. The taller the bar, the more often the family attended that month. This badge can be edited to show an individual's attendance.

5 Assessments

If the person has completed any assessments the results can be seen here. For more information, see the [Assessments](#) guide.

6 Baptism Badge

The *Baptism Badge* shows if the individual has been baptized.

7 Serving Badge

The *Serving Badge* shows if the person is a member of a serving team.

8 Tags

Tags are a handy tool for creating simple groups of people. Tags are so useful that they have their own chapter.

Family Section

The next section outlines the individual's family or families. The *Family Section* lists each family member's name, age and *Person Profile* page link, along with an address and editing link for each family.

Family Section

The screenshot displays the Rock CRM interface for a family member's profile. The main profile card for Ted Decker (Theodore) includes a photo, name, and tabs for Member, Main Campus, and Follow. It lists personal details such as gender (Male), age (42), birth date (2/10/1980), marital status (Married 21 years), graduation year (1994), and contact information (mobile, home, and work phones, and email). A 'Decker Family' section is highlighted, showing photos and names of family members: Cindy (41), Noah (14), and Alex (11). Below this, the home address is listed: 11624 N 31st Dr, Phoenix, AZ 85029-3202. The interface also shows a navigation menu on the left, a top navigation bar with tabs like Profile, Extended Attributes, Steps, Groups, Documents, Contributions, and Benevolence, and a right sidebar with sections for Alerts (Personal Note), Bookmarked Attributes, Connection Requests, Known Relationships, and Peer Networks.

The address section of the family area has a couple of interesting features. Clicking on the 🏠 to the left of the address will bring up an interactive map. Also, when you roll over the address a 📍 will appear to the right. This icon will standardize and geocode the address when clicked. Lastly, you can click the ⚙️ icon to edit the address and its configuration.

Note

In Rock, an individual can be in more than one family. In these cases, both families will be shown in the family section. Behind the scenes one family is classified as the Primary Family, but for the most part each family is treated as an equal.

Tabs Bar

The lower area of the page is devoted to subsections, with tabs that are visible according to your security level. We'll talk about each one below.

The screenshot displays a user interface for a person's profile. At the top, there is a navigation bar with a search icon and a user profile icon. Below this is a 'Subsections Bar - Person Profile' with several tabs: 'Profile' (highlighted in orange), 'Extended Attributes', 'Steps', 'Groups', 'Documents', 'Contributions', 'Benevolence', and 'More'. The main content area is divided into two columns. The left column features a large profile picture of Ted Decker, his name 'Ted Decker' (Theodore), and a 'Member' status. Below this are icons for 'Email', 'Actions', and 'Edit'. Further down, personal details are listed: 'Male', '42 years old' (born 2/10/1980), 'Married 21 years' (wed 1/4/2001), and 'Graduated 1994'. Contact information includes three phone numbers (Mobile, Home, Work) and an email address 'ted@rocksolidchurchdemo.com'. Social media icons for Facebook and Twitter are also present. The 'Decker Family' section shows three family members: Cindy (41), Noah (14), and Alex (11). At the bottom, the 'Home Address' is listed as '11624 N 31st Dr, Phoenix, AZ 85029-3202'. The right column contains a 'Staff' section with a '+', an 'Alert: Personal Note' section with two entries from Alisha Marble (8 years ago), and sections for 'Bookmarked Attributes', 'Connection Requests', 'Known Relationships', and 'Peer Networks'. The bottom of the page has a small footer: 'Crafted by Spark Development Network / License'.

Person Profile Tab

The first tab is the *Person Profile*, with notes and key attributes. Let's break each of these areas down.




Timeline

The Timeline shows notes about a person, some of which are system-generated whenever the individual completes certain actions like joining a group. Most of them, however, are entered by staff and key volunteers. Notes are an important part of Rock

and we've devoted an entire chapter to their usage below.

Bookmarked Attributes

As we discussed earlier, person attributes are an important part of Rock. Over time, your list of attributes will grow according to your organization's needs. Each staff member, however, only works with a limited set of attributes, depending on their position. To help simplify this, we've added a Bookmarked Attributes section. Each staff member can choose a list of person attributes they want to display in this box. Every time they visit a *Person Profile* page, their chosen attributes will be displayed.

You can configure which attributes are displayed in this section by selecting the  button in the header. You can also edit the values of the attributes by clicking the  button. Each person can adjust the order of the attributes on their bookmark list by clicking the  button, then dragging the attributes into the desired order.


Connection Requests

This section shows a list of Connection Requests that have been made by the individual. This block's settings let you change the detail page that's viewed when a request is clicked, and lets you hide Connection Requests in specified States. You can read more about Connection Requests in the [Engagement](#) manual.

Known Relationships

Just like in real life, relationships describe connections between two people. Some of the known relationship types provided are:

- Grandparent
- Parent
- Child
- Invited by
- Allow check-in by

To add a new relationship, click the  button on the *Known Relationships* header. Select the relationship type you want to add from the dropdown, then select the person who matches the relationship you're trying to build.

Many of these relationships have an inverse relationship (e.g., Grandparent to Grandchild). When adding one of these relationships, the system will automatically add the inverse relationship for you. What a timesaver!

You can add custom relationship types if you want. In fact, we have a whole chapter on how to manage known relationships.


Peer Networks

Some relationships are known, but others are implied through the data. For example, if two people are in the same group, we can imply a relationship. Rock highlights these kinds of relationships in the Peer Networks area.

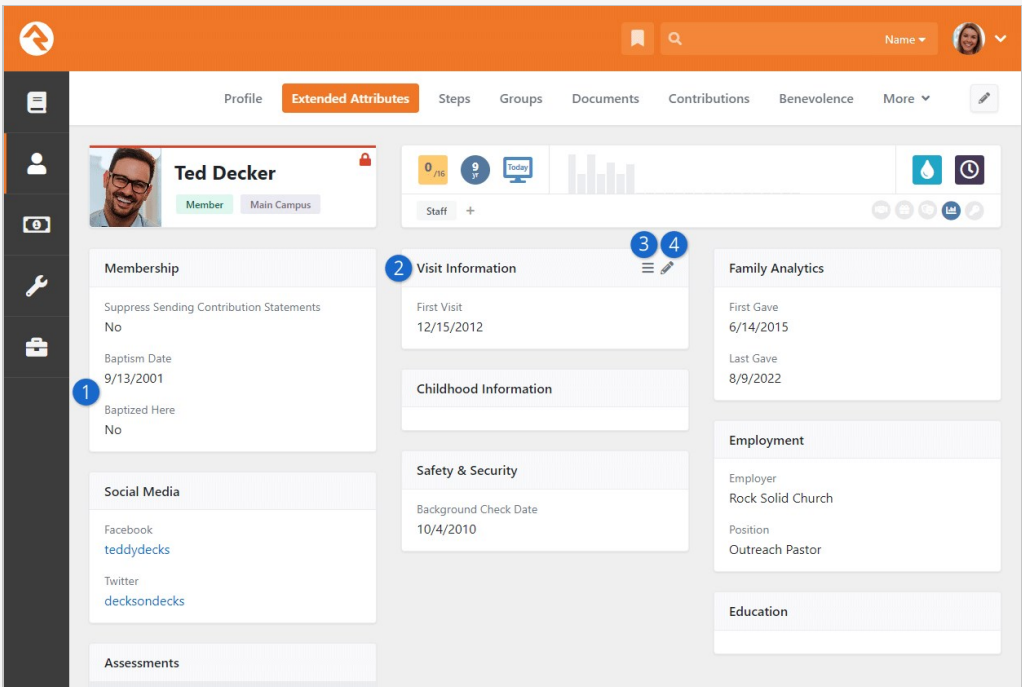
Note

The Peer Networks feature will get more powerful with time as we add more and more capabilities to Rock.

Extended Attributes Tab


The next subsection of the *Person Profile* page contains all the added attributes, grouped by category. Only attributes with values are displayed. To add or edit the value of an attribute, just click the  button in the category header.


Extended Attributes Subsection



1 Category
Attributes are grouped into categories to help order and manage them. The attributes we see here, like for Baptism, are in the Membership category.

2 Category Header
Each category has a header with a name (e.g., Visit Information, Education) and optional icon.

3 Reorder Button
Those with 'Administrate' access to the attribute block can re-order attributes by clicking the  button, then dragging the attributes into the desired order.

4 Edit Button
To edit the values of the attributes in a category click the  button in the header.

Social Media

The *Social Media* category is where you can enter and view social media account information for a person. By default, Facebook, Twitter, Instagram and Snapchat are included, but you can add other social media platforms by creating new *Person Attributes* in the *Person Attributes* screen with the *Social Media Account* field type. The *Person Attributes* screen is located at:

[Admin Tools](#) > [General Settings](#) > [Person Attributes](#) .

Any *Person Attribute* using the *Social Media Account* field type will be displayed as an option in this category, and the icon of any social media options completed for the person will appear below the person's photo in the *Bio Bar*. The *Person Attributes* screen also contains options that allow you to control what the icons look like and how they are displayed.

As you create new groups of person attributes, you'll want to be sure you keep this page updated. See your administrator for help.

Steps Tab

The *Steps* subsection lets you view and manage steps for the person. For full details on Steps, check out our [Engagement](#) guide.

The screenshot shows the 'Steps Subsection' for a user named Ted Decker. The interface includes a navigation bar with tabs for Profile, Extended Attributes, Steps (selected), Groups, Documents, Contributions, Benevolence, and More. Below the navigation bar, there is a profile card for Ted Decker, a Member at Main Campus, with a bio bar showing 0/16 items and a 'Today' indicator. The main content area is titled 'Discipleship Path' and displays a grid of four completed steps: Baptism (2/2/2022), Starting Point Class (5/8/2022), Serve (6/12/2022), and Small Group (7/17/2022). Each step card shows a status of 'Complete' and a count of 2 or 3 items.

Groups Tab

The *Groups* subsection displays a timeline of the person's history with groups, as well as a grid view of all the groups the person is involved with. The grid lists important facts like the type of group, the individual's role in the group and the date they were added to the group.

Groups Subsection

The screenshot displays the 'Groups Subsection' for a user named Ted Decker. The interface includes a top navigation bar with 'Groups' selected, a profile card for Ted Decker (Member, Main Campus), and a 'Group History' calendar for 2022. Below the calendar is a 'Group Types' section with 'Serving Team' and 'Small Group' buttons. The 'Group List' section contains a table with 3 groups and a 'Schedule Toolbox' for Ted Decker with a 'Copy Calendar Link' button and three action buttons: 'Schedule Unavailability', 'Update Schedule Preferences', and 'Sign-Up for Additional Times'.

Group History

2022

Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
[Green bar]												
[Blue bar]												

Group Types

[Serving Team](#) [Small Group](#)

Group List

Name	Group Type	Description	Role	Added
A/V Team	Serving Team		Member	3 Years Ago
Decker Group	Small Group	Small group with Ted as the group leader.	Leader	3 Years Ago
Members and Attendees	Communication List		Recipient	17 Months Ago

50 | 500 | 5,000 | 3 Groups

Schedule Toolbox - Ted Decker

[Copy Calendar Link](#)

Actions

- [Schedule Unavailability](#)
- [Update Schedule Preferences](#)
- [Sign-Up for Additional Times](#)

Schedule Toolbox

The schedule toolbox is used to update and display information that intertwines with the group scheduler. Each person will have their confirmed and requested schedule, their preferences and a sign up button.

Schedule Toolbox - My Schedule

A/V Team Serving Team Member 3 Years Ago

Decker Group Small Group Small group with Ted as the group leader. Leader 3 Years Ago

Members and Attendees Communication List Recipient 17 Months Ago

50 500 5,000 3 Groups

Schedule Toolbox - Ted Decker

Copy Calendar Link

8/20/2022
A/V Team - Main Campus
Saturday 4:30pm Confirmed

8/21/2022
A/V Team - Main Campus
Sunday 10:30am Decline Accept

Actions

- Schedule Unavailability
- Update Schedule Preferences
- Sign-Up for Additional Times

This area shows the person's confirmed and requested schedule. This same information can also be seen if that person is signed in on the external site under [My Account > Schedule Toolbox.](#)

Schedule Toolbox - Preferences

Schedule Toolbox - Ted Decker

< Back

A/V Team

Send Reminders
3 days before

Current Schedule
Every Week

Starting On
8/21/2022

Assignment
Please select a time and optional location that you would like to be scheduled for.

Schedule	Location
Sunday 10:30am	Main Campus

An internal staff member can set a person's schedule preferences, or the person can set their own preferences and sign up for events using the *Sign Up* tab from the external website.

Learn more about the group schedule toolbox and group scheduling in the [Rock Your Groups](#) guide.

Documents Tab

The *Documents* tab lets you view and manage person documents.

Person Profile Documents Tab

Profile Extended Attributes Steps Groups **Documents** Contributions Benevolence More

Ted Decker
Member Main Campus

Documents

Name	Type	Created By	Created On	
Ted's Ministry Document	Ministry Document	Alisha Marble	14 Minutes Ago	📄 🔒 ✕
Letter of Recommendation for Ted Decker	Letter of Recommendation	Alisha Marble	12 Days Ago	📄 📄 🔒 ✕

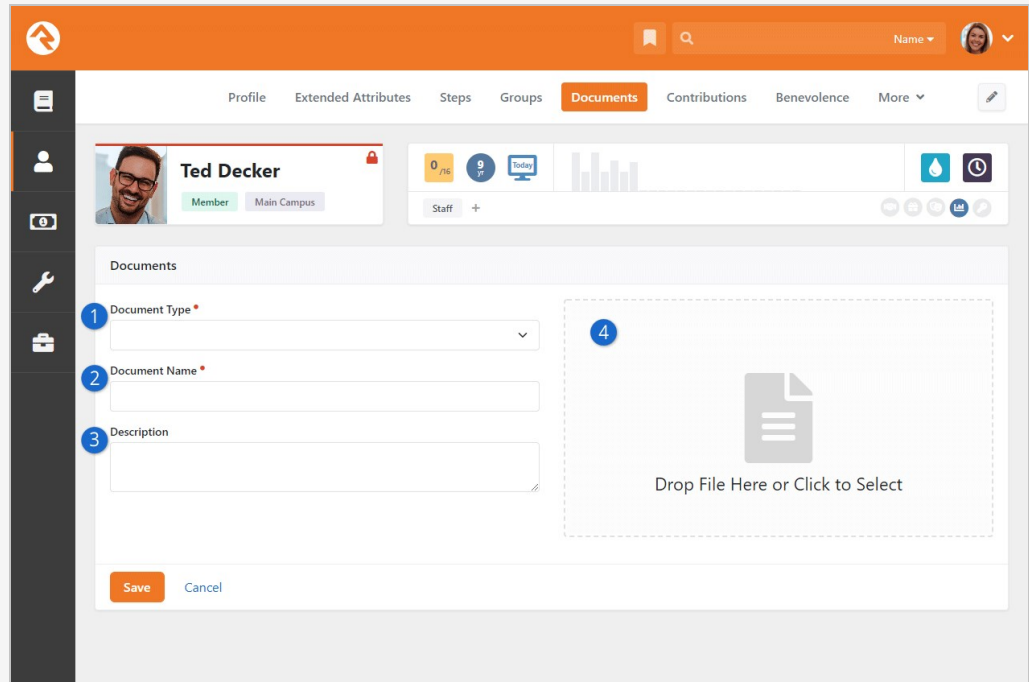
Electronic Signature Documents

Name	Document Type	Last Invite Date	Signed Date	Applies To	Assigned To	Signed By	Status	Document
Ted Decker Signed Photo Release	Photo Release		3/4/2024 9:07 AM	Ted Decker	Ted Decker	Ted Decker	Signed	📄 ✕

50 500 5,000 1 Document

At the top of the panel pictured above you can see a summary of the documents associated with the person. At the bottom is a list of all the signature documents associated with the person. For details on signature documents, check out the [Rock Admin Hero Guide](#). For now, let's focus on the Documents block.

For each document in the Documents block, the icons to the right allow you to view the document's description as well as download, secure or delete the document. Some types of documents (PDF, PNG, JPG or GIF) can also be viewed directly from the browser. Click on any row to manage details about the document or click the **+** button to add a new document.



- 1 Document Type**
 Select the type of document that you want to add. The available items are controlled by the document type's configuration and by block settings.
- 2 Document Name**
 If configured for the document type, a default name may be pre-populated here. Otherwise, it will be blank. You can provide your own name or edit the default name.
- 3 Description**
 You can optionally add a description to provide specific details related to this person's document.
- 4 Add Document**
 This is where you'll attach the actual document related to this entry.

Entity Documents

Documents can be added to any entity, not just people. To see how documents can be used with other entity types, see the [Entity Documents](#) section of the [Rock Admin Hero Guide](#).

Contributions Tab

This subsection shows the contributions made by the individual (or family, if combined as a family) and any repeating giving profiles that they have. Staff members can be granted access to create new recurring giving profiles or edit existing ones from this page. The Giving Overview section provides details and analysis of the person's giving.

Contributions Subsection

Name

Profile
Extended Attributes
Steps
Groups
Documents
Contributions
Benevolence
More

Ted Decker
Member Main Campus

0 / 96 9 Today

Staff +

Giving Overview

First Gift: 7 Years Ago | Last Gift: 6 Days Ago | Giving Alerts: 0

Last 12 Months

\$202
2 gifts

Last 90 Days

\$202 ↑ 100.0%
2 gifts

Gives As

Family

Giving Journey: **Consistent**

Giving by Month:

Giving Characteristics

Typical Gift: **\$0**

Typical Frequency: **0d** ±0.0d

Percent Scheduled: **0%**

Frequency: **--**

Preferred Currency: **Credit Card**

Preferred Source: **Website**

Community View: **99%** Percent Bin 1

Giving Configuration

Add One-time Gift

Scheduled Transactions

General Fund \$50.00
Monthly | Next Gift: 8/15/2022
Visa - 2222 | Exp: 03/30
Second Card

+

Saved Accounts

Ted's Visa Not In Use
Visa - 1111 | Exp: 02/24

Cindy's Visa In Use
Visa - 2222 | Exp: 03/30

+

Pledges

+

Contribution Statements

2022 YTD | 2021 | 2020

Yearly Summary

	2022	2021
General Fund	\$202.25	\$370.00
Total	\$202.25	\$630.00
		Building Fund \$260.00
		Total \$630.00

[Show More](#)

Transaction List

Filter Options:

Enabled Filters: Date Range: 8/7/2022 to 8/14/2022

<input type="checkbox"/>	Person	Date	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
<input type="checkbox"/>	Decker, Ted	8/9/2022 8:24:10 PM	\$150.25	Credit Card - Visa	T20220810202410134	282	General Fund: \$150.25	
<input type="checkbox"/>	Decker, Ted	8/8/2022 8:20:45 PM	\$52.00	Credit Card - Visa	T20220810202045119	282	General Fund: \$52.00	

50 | 500 | 5,000 | 2 Transactions

[Reassign Transactions](#)

Benevolence Tab

Those with access to view benevolence information will see a *Benevolence* tab on the *Person Profile* page. The requests shown here are summarized for the entire family.

Benevolence Tab

The screenshot displays the 'Benevolence Tab' for a user named Ted Decker. The interface includes a navigation bar with options like Profile, Extended Attributes, Steps, Groups, Documents, Contributions, and Benevolence. The main content area shows a user profile card for Ted Decker (Member, Main Campus) and a table of Benevolence Requests. A 'Total Results' summary box is also present.

Date	Campus	Name	Connection Status	Government ID	Request	Assigned To	Result Summary	Result Specifics	Status	Total Amount
8/16/2022	Main Campus	Ted Decker	Member		Assistance needed with this month's utility bills.	Alisha Marble		Provided Financial Assistance (\$100.00)	Pending	\$100.00

Total Results	
Provided Financial Assistance:	\$100.00
Total:	\$100.00

For additional details related to benevolence, see the [Rock Solid Finances](#) guide.

Security Tab

Rock takes security very seriously and offers several ways to protect both information and people. The *Security* tab is one location where you can view and access Rock's security settings and data.

Security Subsection

Name ▼

Profile Extended Attributes Steps Groups Documents Contributions Benevolence More ▼

Ted Decker
Member Main Campus

0 hrs 9 pts 1 msg

Staff +

Signals

Name	Owner	Note	Expiration Date
No Items Found			

Security Roles

Name	Group Type	Description	Role	Added	System
RSR - Calendar Administration	Security Role	Group of individuals who can administrate the various parts of the calendar functionality.	Member	✓	✗
RSR - Communication Administration	Security Role	Group of individuals who can administrate the various parts of the communication functionality.	Member	✓	✗
RSR - Connection Administration	Security Role	Group of individuals who can administrate the various parts of the connection functionality.	Member	✓	✗
RSR - Event Registration Administration	Security Role	Gives access to create and administrate event registration templates and instances.	Member	✓	✗
RSR - Pastoral Workers	Security Role	Group of individuals who can access information limited to just pastors on staff.	Member		✗
RSR - Prayer Access	Security Role	Group of individuals who have access to prayer requests for the purpose of intercessory prayer.	Member	✓	✗
RSR - Staff Workers	Security Role	Used to give rights to the organization's staff members.	Member	✓	✗
WEB - Administration	Security Role	Group of individuals who administrate portals. They have access to add, remove, update pages and their settings as well as the content on the page.	Member	✓	✗

50 500 5,000 8 Groups

User Account List

Filter Options ▼

Username	Provider	Created	Last Login	Confirmed	Locked Out	Password Change Required
tdecker	Database	10/18/2018	8/15/2022	✓		✗

50 500 5,000 1 Login

Profile Viewed By



Person	Age	Gender	First Viewed	Last Viewed	Times Viewed
Alisha Admin	52	Female	3/31/2021 2:12:22 AM	8/16/2022 8:03:03 PM	91

50 500 5,000 1 Item

Profiles Viewed

Person	Age	Gender	First Viewed	Last Viewed	Times Viewed
No Profiles Found					

Signals

Signals are discreet flags that can be assigned to a person to bring attention to something. They can be used to flag anything from security concerns to high-level lay leads and everything in between. Click the  button to add a new signal. Click the  button to delete an existing one.

Security Roles

In the *Security Roles* section, you can view, add and delete the person's security roles. The [Rock Admin Hero Guide](#) has all the details you'll need for understanding these roles and their meanings.

User Account List

Each account (i.e., username) associated with a person is listed here. Over time a person can obtain multiple accounts if they forget one and re-register on the website. You can manage accounts in this section.

For more information on user accounts and logging in, check out the [Rock Admin Hero Guide](#).

Profile Viewed By

The *Profile Viewed By* section contains a record of people who have viewed this person's profile. The information in this section can't be modified, but it can be exported into an Excel report if needed.

Profiles Viewed

The *Profiles Viewed* section contains a record of the profiles this person has viewed. The information in this section can't be modified, but it can be exported into an Excel report if needed.

History Tab

The *History* tab includes such things as:

- **Communication History** - A list of all the communications of any type that have been sent to the individual, with full details of each communication available to view.
- **Attendance History** - A list of all the events and services the person has attended.
- **Person History** - A list of all the changes that have been made on the individual's record, including Connection Request and Steps updates. This area is helpful for identifying what was changed and who made the changes.
- **Assessment History** - A history of assessments that have been taken and/or requested.

History Subsection

The screenshot displays a user profile for Ted Decker. At the top, there is a navigation bar with a home icon, a search bar, and a user profile icon. Below the navigation bar, the profile information for Ted Decker is shown, including his name, role (Member), and location (Main Campus). To the right of the profile information, there are several icons representing different metrics or actions.

The main content area is divided into four sections:

- Ted Decker's Communication History:** This section shows a list of communication items. The first three items are "Summer Camp Update", "Join Us This Sunday!", and "Welcome!". Each item is from Alisha Admin and is marked as "Delivered".
- Attendance History:** This section shows a table of attendance records. The table has columns for Location, Campus, Schedule, Group, Start Date Time, End Date Time, and Attended. There are three rows of data.
- Person History:** This section shows a list of person history items. The first item is "Group Changes" by Alisha Admin, which modified the home location value for Ted Decker. The date range is 8/16/2022 to 8/16/2022.
- Assessment History:** This section shows a list of assessment items. The first item is "DISC" with a status of "Complete", requested by Ted Decker, and completed on 2/2/2013 at 12:00:00 AM.

Don't forget, you can easily switch between family members. When you scroll down on any of the pages described above, you'll notice a drop-down menu near the top left of the screen where you can select other family members to view.

Select Family Member

Profile **Extended Attributes** Steps Groups Documents Contributions Benevolence More

Ted Decker Profile **Extended Attributes** Steps Groups Documents Contributions Benevolence More

Cindy Decker
Noah Decker
Alex Decker

Social Media

Assessments

DISC

D Value
High

I Value
High

S Value
Low

C Value
Low

DISC Profile
ID

Childhood Information

Employer
Rock Solid Church


Position
Outreach Pastor

Safety & Security

Background Check Date
10/4/2010

Education

Editing an Individual

To edit the bio and contact information for an individual, click the  button in the upper-right corner of the *Person Profile* page. Rock will display the edit screen for that person's profile.

Edit An Individual

Edit Person
Home > Profile > Edit Person

Edit: Ted Decker

Record Status: Active

Photo:

Use care when editing this record as the individual is in a sensitive security role. Ensure you trust the source of the request to update their email address and/or mobile phone number as this could be used to grant access to their account.

Title: [Dropdown] First Name: Ted

Nickname: [Text] Middle Name: [Text]

Last Name: Decker Suffix: [Dropdown]

Connection Status: Member

Gender: Male Female Unknown

Birth Day: Fcb: 10 / 1980

Grade: [Dropdown] Graduation Year: 1994

Marital Status: Married Anniversary Date: 1/4/2001

Contact Info

Mobile: (623) 555-3322 SMS Unlisted

Home: [Text] SMS Unlisted

Work: (623) 555-2444 SMS Unlisted

Email: teddecker@rocksolidchurchdemo.com Email Is Active

Email Preference: Email Allowed No Mass Emails Do Not Email

Communication Preference: Email SMS

Alternate Identifiers

Alternate Identifiers: [Info Icon]

Value: 9d7f558-20e564b

Advanced Settings

Combine Giving With: Decker Family (Ted, Cindy, Noah and Alex) Previous Last Names: No Person Previous Names Found

Lock as Child: Yes No

Search Keys: [Info Icon]

Search Type: [Text] Search Value: [Text]

Email: ted@rocksolidchurchdemo.com

Save **Cancel**

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Most of this screen should be pretty simple, but we have a few helpful tips to share.

When you mark an individual *Inactive*, you'll be asked to provide a Reason and a Note. This information helps the organization understand why groups of people are leaving and it helps the next person who looks at the record understand why this change was made.

Near the top of the screen, you'll notice a warning indicating that changes to this record should be made with caution. This is due to the person's account protection profile level. You can control who can see this warning by editing the block's security settings.

Near the bottom of the screen is the *Alternate Identifiers* section, where you can assign an individual an alternate identifier to use during check-in to speed up the process.

Alternate identifiers may include barcode or fingerprint IDs, or any other text you care to use. The [Checking-out Check-in](#) manual has more information about this process.

Before Now

In previous versions of Rock, these identifiers were assigned at the family level. Now they are assigned to individuals, and any previous identifiers you may have created have been moved to the family's "head of household", which is typically the oldest male. Rock runs a job every night to find anyone who hasn't been assigned an Alternate Identifier and assigns them one. So, you can count on the fact that everyone in Rock will have at least one alternate identifier within a day of when their record is created. You can create any number of alternate identifiers, and you can use [Lava](#) to look up a person record by any of their alternate IDs, so you can do all kinds of fun things with them!

In the *Advanced Settings* section, you'll find the *Combine Giving With* field. This helps describe how the individual would like their contributions tracked. In most cases individuals would like to have the contributions tracked as a family (the default option). If someone wants contributions to be tracked separately, just select the blank option.

Here you'll also see an option to *Lock as Child*. This overrides the automated process of updating a person to an adult when they turn 18. By default, individuals in Rock are considered adults when they turn 18 or are designated an adult in a family. The *Lock as Child* option may be useful for situations where, although an individual is 18, it's best for Rock to continue to consider them a child in a family. This setting will also keep the "Move Adult Children" part of the [Data Automation job](#) from reclassifying them within their family automatically.

Finally, there's a *Search Keys* section you'll want to note. Rock is configured to support additional email addresses in this area. These could be outdated email addresses or simply alternate email addresses. Rock will consider these alternate email addresses when looking for matching person records but will **not** use these alternate addresses for communications. This helps prevent some duplicate records from getting created.

Adding a Family

Important

Before adding a new family be sure to search the database first. No matter how certain you are that they are new, you should always double check.

To add a family to the database, click `People > New Family` from the main menu. Rock will display the *New Family* screen.

Add A Family

New Family
Home > New Family

Add Family

Family Members

Role *	Title	Name *	Suffix	Connection Status *	Gender *	Birthdate	Grade
<input checked="" type="radio"/> Adult <input type="radio"/> Child	<input type="text"/>	First Name <input type="text"/> Last Name <input type="text"/>	<input type="text"/>	Visitor <input type="text"/>	<input type="radio"/> M <input type="radio"/> F	<input type="text"/>	<input type="text"/>

Campus *
Main Campus

Marital Status of Adults ⓘ

Address
Address Line 1

Address Line 2

City
 Arizona
 Zip

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Family Members

First, add the individuals to the family. Completing this section should be fairly easy, but remember these points:

- Only use these fields to add individuals to the family who are not already in the database. If you know that one or more of the individuals are already in the

system, just add those who are not. After the family is saved, you can then edit the family and add the existing members.

- Note the marital status selection below the list of family members. This allows you to set the marital relationship of the adults in the family. These options are *Defined Values* so you can rename them or add additional options. You can read more about editing *Defined Values* in the [Rock Admin Hero Guide](#).
- The *Grade* field will only be shown when you're adding a child.
- Additional addresses (work, previous) can be added after saving the family.

Campus and Address

The final step in adding a family is to select their campus and add their home address. Additional addresses can be added to the family after it has been saved.

Note

The *Campus* field will be hidden if there's only one campus set up in your system. If a campus value is required by your *Add Family* block settings (see next section) then the only available campus is automatically applied to the family's record behind the scenes.

Add Family Block Settings

You can customize which options you want to display in the *Add Family* block by customizing the block settings.

Add Family Block Settings

Add Group CRM > Person Detail / kt: 252

Basic Settings | Advanced Settings

- 1 Name *
Add Family
- 2 Group Type ⓘ
Family
- 3 Parent Group ⓘ
[Person Icon]
- 4 Show Title ⓘ
Yes
- 5 Show Nick Name ⓘ
No
- 6 Show Middle Name ⓘ
No
- 7 Enable Common Last Name ⓘ
Yes
- 8 Default Connection Status ⓘ
Visitor
- 9 Show Suffix ⓘ
Yes
- 10 Gender ⓘ
Require a gender for each person.
- 11 Birth Date ⓘ
Don't require.

12 Child birthdate Don't require.

13 Grade Don't require.

14 Show Inactive Campuses Yes

15 Require Campus Yes

16 Show County No

17 Marital Status Confirmation Yes

18 Adult Marital Status

19 Child Marital Status Single

20 Address Don't require.

21 Location Type Home

22 Show Cell Phone Number First No

23 Phone Number Don't require.

24 Adult Phone Number Don't require.

25 SMS

26 Attribute Categories

Person Workflow(s)

Adult Workflow(s)

27 Child Workflow(s)

Group Workflow(s)

28 Person Detail Page

29 Enable Alternate Identifier No

30 Generate Alternate Identifier Yes

31 Detect Groups already at the Address Yes

32 Max Groups at Address to Detect 10

- 1 **Name**
Enter the name you want to give the block. The default is 'Add Family'.
- 2 **Group Type**
Select the group type to display groups for. The default is 'Family'.
- 3 **Parent Group**
Select the parent group to add the new group to. The default is 'None'.

- 4 Show Title**
Select 'Yes' to display a dropdown menu of titles.
- 5 Show Nick Name**
Select 'Yes' to show an edit box for Nick Name.
- 6 Show Middle Name**
Select 'Yes' to display an edit box for Middle Name.
- 7 Enable Common Last Name**
Select 'Yes' to autofill the last name field when adding a new group member with the last name of the first group member. Remember, families are groups, and the individuals in the family are group members.
- 8 Default Connection Status**
Select the default connection status. If this is not set, the new family member will inherit the same status as the family member who is adding them.
- 9 Show Suffix**
Select 'Yes' to display the person suffix field.
- 10 Gender**
Select whether gender should be required for each person added.
- 11 Birth Date**
Select whether a birth date should be required for each person added.
- 12 Child Birthdate**
Select whether a birth date should be required for each child added.
- 13 Grade**
Select whether a grade should be required for each child added when the group type is Family.
- 14 Show Inactive Campuses**
Select whether inactive campuses should be shown.
- 15 Require Campus**
Select 'Yes' to make a campus required.
- 16 Show County**
Select 'Yes' to provide a County field in the address.
- 17 Marital Status Confirmation**
Select whether a confirmation message should be displayed when saving an adult without a marital status and the group type is Family.
- 18 Adult Marital Status**
Select the default marital status for adults when the group type is Family.
- 19 Child Marital Status**
Select the default marital status for children when the group type is Family.
- 20 Address**
Select whether to require an address for the family.
- 21 Location Type**
Select the type of location that should be used for the address.

22 Show Cell Phone Number First

Select whether the cell phone number should be listed first before the home phone number.

23 Phone Number

Select whether a phone number should be required for at least one person in the family.

24 Adult Phone Number

Select whether a phone number should be required for each adult added.

25 SMS

Select whether SMS should be enabled for cell phone numbers by default.

26 Attribute Categories

Select the Person Attribute Categories to display attributes from. The next section below talks about how this setting is used.

27 Workflows

Which workflows to launch when a family is added.

28 Person Detail Page

Select the page to navigate to after the family has been added. {GroupId} and {PersonId} can be included in the route. Leave blank to go to the default page of ~/Person/{PersonId}.

29 Enable Alternate Identifier

If set to "Yes" you can manually enter a custom identifier for each person when adding the family.

30 Generate Alternate Identifier

When this is set to "Yes" an alternate identifier will be generated automatically for each person.

31 Detect Groups already at the Address

If there is already a family (i.e., group) at the address provided, then you can have the system detect it and alert you. You will then be able to use an existing group instead of creating a new one.

32 Max Groups at Address to Detect

Use this feature to reduce the number of existing groups you'll be presented with when adding a new family to an address in use by other groups.

Select which options and default settings you want to display and click .

Default Connection Status

As noted above, if a *Default Connection Status* has not been set, then the new family member will be assigned the same status as the family member who is adding them. For instance, a new child will be added with a status of 'Member' if the parent's status is 'Member'. If you have requirements for certain statuses, be sure to set a *Default Connection Status* to ensure people aren't assigned statuses for which they do not qualify.

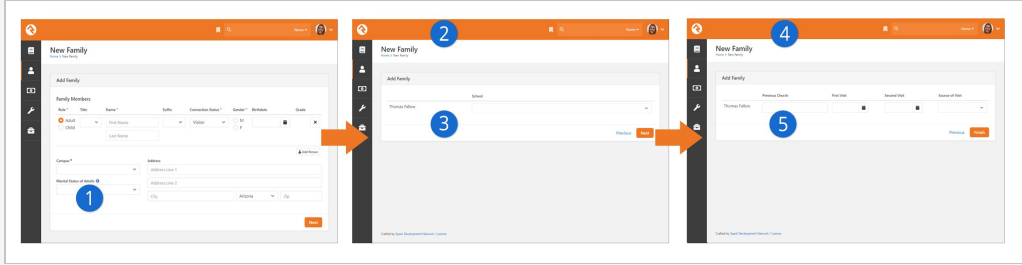
Want Even More Info?

For many, the family entry screen will be just what the doctor ordered. Some organizations, however, may want to capture additional information about the family. The good news is you can have both!

The block settings of the *Family Entry* block include a setting for configuring attribute categories. After filling out the family, phone number and email information and selecting , you'll see an entry form for the first attribute category you selected. Completing this form and pressing takes you to the next attribute category. This will continue until you've entered information for each attribute category. On the last screen, you'll see the button.

The following example shows this process with the *Education* and *Visitor Information* attribute categories set.

Adding Additional Attributes



1 Next

With the additional attribute categories added, the `Finish` button on the phone number and email page (not pictured) is renamed to `Next`. Clicking `Next` will take you to the first attribute you've added to the block settings.

2 First Category

After clicking `Next` from the phone number/email page, the first attribute category, *Education*, is displayed.

3 Next or Previous

Navigation buttons are present to step either forward or backward.

4 More Information

The remaining attribute category, *Visitor Information*, is displayed next.

5 Finish

Since this is the final attribute category, the `Finish` button is back.

Useful Tips

Below are a few tips to help you use this feature to its fullest:

- Remember that attributes can belong to more than one attribute category. This allows you to create custom attribute categories with the sole purpose of being used on the *Family Entry* screen.
- If you configured the attribute to be required, it will also be required on these entry forms. Keep in mind that it will be required when it's edited on the *Person Profile* page, too.

Duplicates Happen

To help reduce the number of duplicate records, Rock will display a listing of possible duplicates for individuals added to the family.

Possible Duplicates

The screenshot shows the 'New Family' page in a software application. The page has an orange header with a search bar and a user profile icon. A dark sidebar on the left contains navigation icons. The main content area is titled 'New Family' and includes a breadcrumb 'Home > New Family'. Below this is a section titled 'Add Family'. A yellow warning box with a blue '1' icon contains the text: 'Possible Duplicates. One or more of the people you are adding may already exist. Please confirm that none of the existing people below are the same person as someone that you are adding.' To the left of the main content, a blue '2' icon points to the text 'Ted Decker (New Record)'. Below that, a blue '4' icon points to a button labeled 'Do Not Add Individual'. To the right, a blue '3' icon points to a section titled 'Possible Duplicate Records' which features a profile card for 'Ted Decker'. The card includes a small photo, the name 'Ted Decker', age 'Adult (41 yrs old)', family members 'Cindy, Noah, Alex', and an address: '11624 N 31st Dr, Phoenix, AZ 85029'. It also lists contact information: 'ted@rocksolidchurchdemo.com', '(623) 555-3322 Home', '(623) 555-3322 Mobile', and '(623) 555-2444 Work'. At the bottom right of the main content area, a blue '5' icon points to a 'Continue With Add' button, with a 'Previous' link to its left. At the very bottom of the page, there is a small footer: 'Crafted by the Spark Development Network / License'.

1 Possible Duplicates

You'll see a warning message indicating that you may be adding a duplicate record into the system. This page is skipped if no duplicates are detected, or if the existing record's Account Protection Profile is configured to skip duplicate checking based on your Security Settings.

2 New Record

The "New Record" is listed to the left, for comparison against existing records on the right.

3 Possible Duplicate Records

Existing records that may be duplicates of what you're trying to add are listed here. This allows you to view details related to the existing record, to determine whether you should proceed.

4 Do Not Add Individual


Click this button if you've determined that the record you're trying to add already exists and should not be added.

5 Continue With Add

If you've determined the record you're adding is not a duplicate and should be added to the system, then you can proceed by clicking this button.

For more information about duplicates in general, check out the Duplicates chapter below.

Editing a Family

To edit a family, click the  button in the upper-right corner of the *Family* section of the *Person Profile*. This will take you to the screen pictured below.

Edit Family
Home > Person Profile > Edit Family

Decker Family

1 Family Name * Decker Family Campus * Main Campus Record Status Active Family Status

Family Members Add Person

2 Ted Decker Adult Child Cindy Decker Adult Child Alex Decker Adult Child Noah Decker Adult Child

Addresses Family Moved

Type	Address	Mailing	Map Location
3 Home	11624 N 31st Dr Phoenix, AZ 85029	✓	✓


Save Cancel

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1 Overview Section

You can edit high-level information about the family here.

2 Family Members

From here you can add people to the family (e.g., a new child is born) or maintain each person's Role (Adult or Child) in the family. You can also click the  icon to move the individual to a new family.

3 Addresses

Here you can maintain the family's address information or begin the process of indicating the family has moved.

Each of the areas noted above are discussed in greater detail below.

Overview Section

The top section of the page allows you to edit the family's name, campus and record status. The family name is used as a title for the family.

Since a person is tied to a campus through the family unit, this is where you would change the campus for all members of a family. If you only have one campus, then the *Campus* field won't be visible.

Note

If a person is in two different families, each tied to a different campus, they will be counted and reported in both campuses.

While the *Record Status* is typically set on a specific person, we know you'll sometimes need to change it for a whole family at once. When you mark the family *Inactive*, you'll be asked to provide a reason. Like inactivating an individual, this helps the organization understand why groups of people are leaving and helps the next person who looks at this specific record understand why this change was made.

Keep in mind that marking the family *Inactive* will also inactivate each member of the family. The individuals in the family will also be made *Inactive* in any groups to which they belong.

Family Members Section

The next section allows you to manage the members of the family. To add a new person to the family, click the `Add Person` button in the header. This will allow you to either select a person who's already in the database (say you're building a blended family) or add a new person (common if you're adding a new baby).

You can also move a family member to a new family. This is commonly done by some organizations when a child turns 18. We'll discuss this more in the *Recommendations for Life Events* section.

When you add an existing person to a family, you're given the option of removing them from other families. If this is a blended family situation with joint custody, you'll probably want to keep them in their current families. But, if the child is transitioning families, you'll most likely want to remove them from the first one.

When an existing person is a member of more than one family a small delete button will appear, which allows you to remove them from the family.

Note

These are sensitive situations! Please take care when making these family changes. Ask extra questions and invest in getting this right from the start. Consider adding notes to the *Person Profile* records of those involved to explain the situation in a positive way. This will help future staff understand the family make-up better and keep them from making changes that could upset a family member.

Addresses Section

This final section lists all the current and past addresses for a family. Several different address types can be attached to a family. Ask your administrator for help with adding new address types if needed.

When a family moves, it may be tempting to simply change the home address and save the record. Instead, you should click the `Family Moved` button. This will automatically move the home address to a previous address and start a new home address for you. Having a previous address is very helpful. When someone moves there's a period of transition when both addresses could be floating around (online form submissions, checks, etc.) Having both addresses in the system helps staff understand the transition. This also helps reduce the chance that someone would change the new address back to the old. Trust us, it happens!

Map Location

Rock requires that one (and only one) address be used for showing on the map. The *Map Location* flag indicates which address is being used for this purpose. The flag doesn't necessarily mean that the location can be mapped. For instance, if a family has only one address in the system, that address will always be tagged as the *Map Location* because there is no other location to reference.

Important

Please keep in mind that none of your changes on the *Family Edit* screen are actually saved until you click the `save` button. This includes actions like `Move to`, `New Family` and `Add Person`.

Family Pre-Registration

Available on the external website under *Connect*, the *Family Pre-Registration* page is often where people are directed to create a new record in Rock. Having a place where people can add themselves to Rock saves your staff and volunteers from having to manually create new people and families. The form is simple and easy to use, as shown below.

Family Pre-Registration Entry

Family Pre-Registration

Home / Connect / Family Pre-Registration

- Children
- Students
- Adults
- Prayer
- Missions
- Serve
- Small Groups
- Contact Us
- Example Form
- Subscribe
- Family Pre-Registration**
- Sign-Ups Finder

Visit Information

Campus * **Planned Visit Date ***

1 Main Campus

Adult Information

2 First Adult

First Name Alisha **Last Name** Marble

Gender * Female

Birth Date Jan / 20 / 2005 **Marital Status**

Mobile Phone * 1 (313) 555-1213 **3** Please give your consent to receive SMS messages by simply checking the box.

Email * admin1@test.test

Second Adult

First Name **Last Name**

Gender

Birth Date / / **Marital Status**

Mobile Phone 1

Email

Please give your consent to receive SMS messages by simply checking the box.

Address

4 United States

7007 W Happy Valley Rd

Address Line 2

Peoria AZ 85383-322

Children

5 First Child

Relationship to Adult * Child

First Name * Noah **Last Name *** Decker

Gender * Male

Birth Date * Mar / 10 / 2008 **Grade** 7th Grade

1 Campus and Planned Visit Date

Capturing this information lets you know where the person might be planning to attend a service or event, and when. This information is typically only used if you're launching a workflow as part of the pre-registration process. The Campus field will not be shown if you have only one campus.

2 Adult Information

Adults will fill out this portion of the form for themselves. The block's settings control which fields are optional or required. First and Last Name are always required at a minimum.

3 SMS Opt-In

Allows the person to choose whether they would like to receive text messages on their mobile number. The options for this field may be hidden, only shown for first adult, shown for all adults or shown for adults and children.

4 Address

The same address will be applied to all adults and any children entered on the form. This will be stored as a Home address.

5 Child Information

The block's settings let you control which questions to ask children. These are configured separately from the questions that are asked of adults. In both cases, attribute categories can be added in the block settings to allow entry for things like Allergies or Legal Notes.

6 Add Child

Click this button to add the first child, or additional children after the first.

After everyone's information is entered, all the person needs to do is click to complete the process.

The screenshot shows a web page titled "Family Pre-Registration Confirmation" for "Rock Solid Church Demo". The page has a dark navigation bar with links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", and "Hello Alisha". Below the navigation bar, the main heading is "Family Pre-Registration". A breadcrumb trail shows "Home / Connect / Family Pre-Registration". On the left side, there is a vertical menu with buttons for "Children", "Students", "Adults", "Prayer", "Missions", "Serve", "Small Groups", "Contact Us", "Subscribe", and "Family Pre-Registration". The main content area features a "Thank-you for Registering!" message, stating "We're excited to see you on Sunday!". Below this, a "Now What?" section provides instructions: "When you arrive, just head to the Children's Ministry Check-in Desk to check-in your children. If you have any questions when you are trying to check in children, please see a volunteer to help you. You will receive a tag to place on each child, as well as a tag for you to use to pick up your children after the service. Then, just take your children to the room listed on their tag. When the service is over, return to the same room where you dropped off your children and present your other tag to check them out." At the bottom of the page, it says "Powered by: Rock RMS" and "3120 W Cholla St Phoenix, AZ 85029-4113".

At this point, you'll find the person/family in Rock. This means, for example, they can show up to your next service ready to check in without needing to be manually entered by staff or volunteers.

Block Settings

There are many block settings to customize the *Family Pre-Registration* experience. For instance, you can launch a workflow for each parent and for each child when the form is completed. Or, you can choose to ask for race and ethnicity information. This is also where you'll set whether or not to show the SMS Opt-in option. Administrators are encouraged to review this block's settings to ensure you're collecting all the information you need from new guests.

How Rock Handles People and Families

Now that you've seen how individuals and families are added and edited in Rock, let's talk about how Rock helps you keep that information current.

Imagine having to manually update the ages of individuals in your organization whenever birthdays occur, or the grades of children at the start of each new school year. It would be a daunting, never-ending task! Thankfully, Rock uses automated calculations to update people and families, so you don't have to. Let's look at which information is automated and how Rock makes the calculations.

Age

Rock calculates an individual's age by comparing their birthdate to the current date. Why make things more complicated than they need to be?

Age Classifications

In Rock, an Adult is anyone over the age of 18 or marked as an adult in one or more families. A Child is anyone less than 18 or a child in all families. If either of those conditions aren't met, the individual is marked as Unknown.

Rock calculates age each time a person is saved and re-calculates it every time the *Rock Cleanup* job is run. The value is then saved in the *Age Classification* property on the Person model, where it's made available to use in Data Views, Reports and other filtering operations.

Grade

Rock calculates a person's grade using their graduation year and the global attribute *Grade Transition Date*. When an individual's graduation year is entered into their *Person Profile*, Rock compares that year to the *Grade Transition Date* to determine the individual's grade. You can configure the *Grade Transition Date* in the *Global Attributes* screen, located at [Admin Tools > General Settings > Global Attributes](#).


A Word to the Wise

The transition occurs at the *end* of the specified date, so if you enter today's date, the promotion to the next grade will take place tonight at midnight. Because this is simply a calculation, and nothing is changed on a person's profile, you can freely change the date back and forth and observe that the grade changes.

For more details on grades in Rock, see the School Grades chapter below.

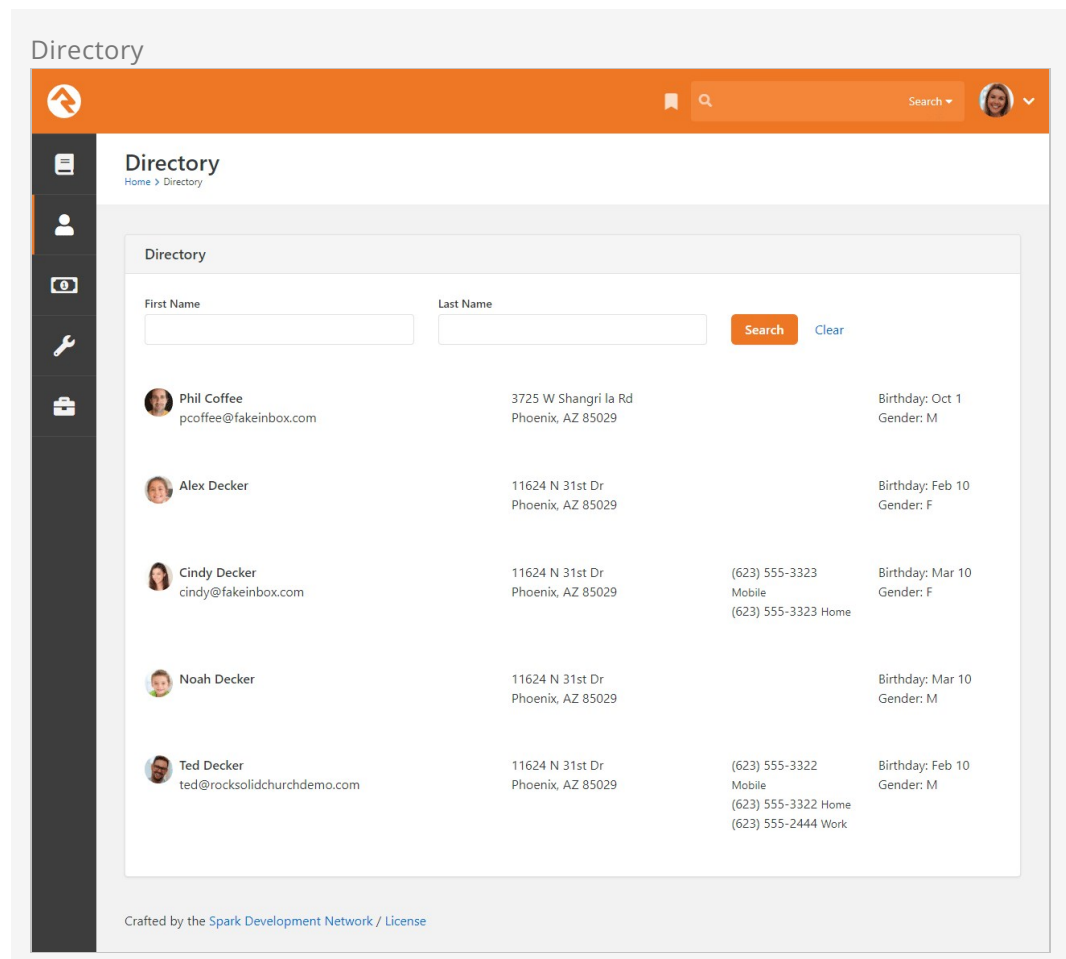
Primary Family

Individuals belonging to more than one family will be assigned a primary family. This is recorded behind the scenes as the *Primary Family ID* and is initially associated with the family that was entered into Rock first.

Because it's stored behind the scenes, you typically won't see the *Primary Family ID*. However, on the *Person Profile* page, the primary family will be whichever family is at the top of the list for the individual. So, you can change the primary family by clicking and dragging the  icon for the desired family to the top of the list. While the *Primary Family ID* isn't visible, behind the scenes it will be updated in real time according to your changes on the *Person Profile*.

Directory

Many smaller organizations like to have a directory of all the people in the database. The Directory feature allows this and much, much more.



Out of the box, the directory is configured to display a simple search screen. However, you can change the "Show All People" block setting to show the first 1,500 people in the database if you prefer.

That's not all this block can do though. Let's check out all the features found under the block settings.

Block Settings

Setting	Description
---------	-------------

Block Settings

Setting	Description
Data View	The results of the directory are driven by a provided Data View. This gives you the power to use the block in many different ways. You may implement it to show <i>All Members and Attendees</i> (which is the default) or perhaps limit it to group leaders, or youth. The sky's the limit.
Opt-out Group	The block allows people to opt out of being shown in the directory. This setting allows you to configure the group that will hold those who wish to opt-out.
Show By	Here you have the option to show the results as individuals or as families.
Show All People	This setting determines if all people should be displayed when the page is loaded or if the person viewing the page will need to first search to find the results.
Person Profile Page	Adding a page to this field will change people's names into links when viewing the directory search results. Clicking a person's name will then take you to the specified page.
First Name Characters Required	This setting determines the minimum number of characters that need to be entered in the <i>First Name</i> field for searching. These types of limits are helpful if you'd like people to be able to find people but not be able to see or print the entire list.
Last Name Characters Required	Like the first name setting, but for the last name.
Show Email	This setting determines whether the email field should be displayed.
Show Address	This setting determines whether the address field should be displayed.
Show Phones	This setting determines which phone types should be displayed.
Show Birthday	Determines if the birthdate field should be shown. If shown, only the month/day will be displayed.
Show Gender	This setting determines whether the gender field should be shown.
Show Grade	This setting determines whether the grade field should be shown.
Show Envelope Number	If applicable (see Rock Solid Finances) you can select to have a person's envelope number shown.
Max Results	You can limit the max number of results to display with this setting. This keeps your server from crashing if you have hundreds of thousands of

Block Settings

Setting	Description
	records.

So, there you have it. Once you consider all the features of this block, we're sure you'll be using it all over your sites.

Duplicates

Where Duplicates Come From

Duplicate records happen - period. It's important that your organization understands why they occur and has a process to eliminate them by merging duplicate records.

There are two main ways duplicate records are added to the system. The first is by a staff person or volunteer using the internal site. Before you add someone to the database, it's important that you make sure they haven't already been added. Even if you're certain the person or family is new, it's always a good idea to double check.

The second way duplicates are added to the system is from activities (e.g., contributions, event registration, connection requests) on the external website. While Rock tries to limit the number of duplicates that are created, sometimes there isn't enough data to know for sure.

At other times a duplicate is created for security reasons. Rock has to be very careful not to allow someone to "hijack" a record. This would allow a person to create an account as another person and gain visibility to their contact and contribution information. In these cases, Rock will create a duplicate record so that a staff person can double-check that the activity is normal before performing a merge.

Finally, it's important to understand that the amount of "friction" you decide to place on people using the public website can affect the number of duplicates generated. For example, you can attempt to limit the number of duplicates created by requiring individuals to log in for things like online giving and event registration. However, this means people will have that extra "friction" of needing to log in. On the flip side, you may choose to not require logins for these things on the web site (thus "low friction"), in which case Rock will attempt to match to an existing person based on Name and Email...but if Rock *doesn't* find such a match, a new (often duplicate) record will be created.

How Rock Avoids Duplicates

As people are added to Rock, the system will try to look for existing records that might be a match before creating a new record. This logic is used anywhere a person could be added, with very few exceptions. For instance, if you use the REST API, this scoring is not done because a developer may not wish to use it.

When an attempt is made to add a new record, existing records are evaluated and assigned a score based on the logic shown below. If a new record has the same first and

last name as an existing record, with nothing else in common, then a score of 30 points (15 + 15) would be assigned.


- First Name or Nick Name = 15 points
- Last Name = 15 points
- Mobile Phone, Email or both = 15 points
- Last Name doesn't match, Previous Name matches = 12 points
- Month and Day of birthdate = 10 points
- Suffix = 10 points
- Year of birthdate = 5 points
- Gender = 3 points

If an existing record scores higher than 35 points, it's considered a match (and possible duplicate) of the new incoming record. If multiple existing records score higher than 35 points, then the record with the highest score will be selected as the match. If there's a tie, then the "first" record (typically the oldest) will be selected.

Rock will not perform the duplicate checking process described above if the existing record's Account Protection Profile is configured to skip duplicate checking based on your Security Settings.

Merging Records

While Rock will continue to pioneer new ways to prevent duplication, it will continue to happen (though hopefully at a reduced rate). So, let's learn how to merge duplicate records.

The first step in merging records is to search for the individual who has a duplicate record. Type the search criteria into the Smart Search field at the top of the page. When you get your results, you can check the records that are duplicates and click the  icon in the list's footer.

Select Individuals To Merge


The screenshot shows a web application interface for 'Person Search'. The header is orange with a search bar and a user profile icon. The main content area has a dark sidebar on the left with navigation icons. The search results are displayed in a table with columns: Person, Age, Connection Status, Record Status, and Campus. Two records are shown, both for 'Miller, Tom' with different contact information. A blue circle '1' is placed over the checkboxes in the 'Person' column. A blue circle '2' is placed over the merge icon (two people) at the bottom right of the table. Below the table, there are pagination controls showing '50', '500', and '5,000' results, and a total of '2 Person Search Results'. The footer of the interface says 'Crafted by Spark Development Network / License'.

Person	Age	Connection Status	Record Status	Campus
<input type="checkbox"/> Miller, Thomas tom.miller@fakeinbox.com 11827 N 33rd Cir Phoenix, AZ 85029-3209		Prospect	Active	Main Campus
<input type="checkbox"/> Miller, Tom tom.miller@fakeinbox.com 2302 E Curnow Dr Phoenix, AZ 85016	43	Member	Active	Main Campus

1 Select Records

First select the records you wish to merge.

2 Click Merge

Next, click the  icon at the bottom of the grid.

On the merge screen you'll see each record side by side. Above these records, you'll see a person picker (under "Add Another Person") that will allow you to add additional records that are also duplicates to the current record. This is necessary if you can't select both duplicate records from a single search (perhaps one of the names is spelled wrong).

Home > Merge People

Merge People


Home > Merge People

Merge Records

Add Another Person

This merge is considered of moderate risk as one of the records has a login. Please be sure to carefully consider the changed information to ensure this is not an attempt to hijack the account.

Conflicting Attribute Values: You do not have permission to view an attribute that has a conflicting value. Proceeding will use the value from the primary merge candidate. If you are unsure that this is the correct value then please contact someone with rights to view all attributes.

	<input checked="" type="checkbox"/> Miller Family (Tom) 2302 E Curnow Dr Phoenix, AZ 85016 Last Modified 1 Minute Ago by Tom Miller	<input type="checkbox"/> Miller Family (Thomas) 11827 N 33rd Cir Phoenix, AZ 85029-3209 Last Modified 1 Hour Ago by Alisha Admin
Photo	<input checked="" type="radio"/> 	<input type="radio"/>
Nick Name	<input checked="" type="radio"/> Tom	<input type="radio"/> Thomas
Connection Status	<input checked="" type="radio"/> Member	<input type="radio"/> Prospect
Birth Date	<input checked="" type="radio"/> 4/1/1979	<input type="radio"/>
Addresses		
Home	<input checked="" type="radio"/> 2302 E Curnow Dr Phoenix, AZ 85016	<input type="radio"/> 11827 N 33rd Cir Phoenix, AZ 85029-3209
Person Attributes		
DISC: D Value	<input checked="" type="radio"/> High	<input type="radio"/>
DISC: I Value	<input checked="" type="radio"/> Medium	<input type="radio"/>
DISC: S Value	<input checked="" type="radio"/> Medium	<input type="radio"/>
Times Checked-In (16 wks)	<input checked="" type="radio"/> 0	<input type="radio"/>
DISC: C Value	<input checked="" type="radio"/> Low	<input type="radio"/>
Times Given (52 wks)	<input checked="" type="radio"/> 0	<input type="radio"/>
DISC Last Save Date	<input checked="" type="radio"/> 10/14/2021	<input type="radio"/>
Times Given (6 wks)	<input checked="" type="radio"/> 0	<input type="radio"/>
Personality Type	<input checked="" type="radio"/> DS	<input type="radio"/>
DISC: DISC Profile	<input checked="" type="radio"/> DS	<input type="radio"/>
Current Journey Giving Stage	<input checked="" type="radio"/> Non-Giver	<input type="radio"/>
Journey Giving Stage Change Date	<input checked="" type="radio"/> 10/6/2021	<input type="radio"/>

Merge Records

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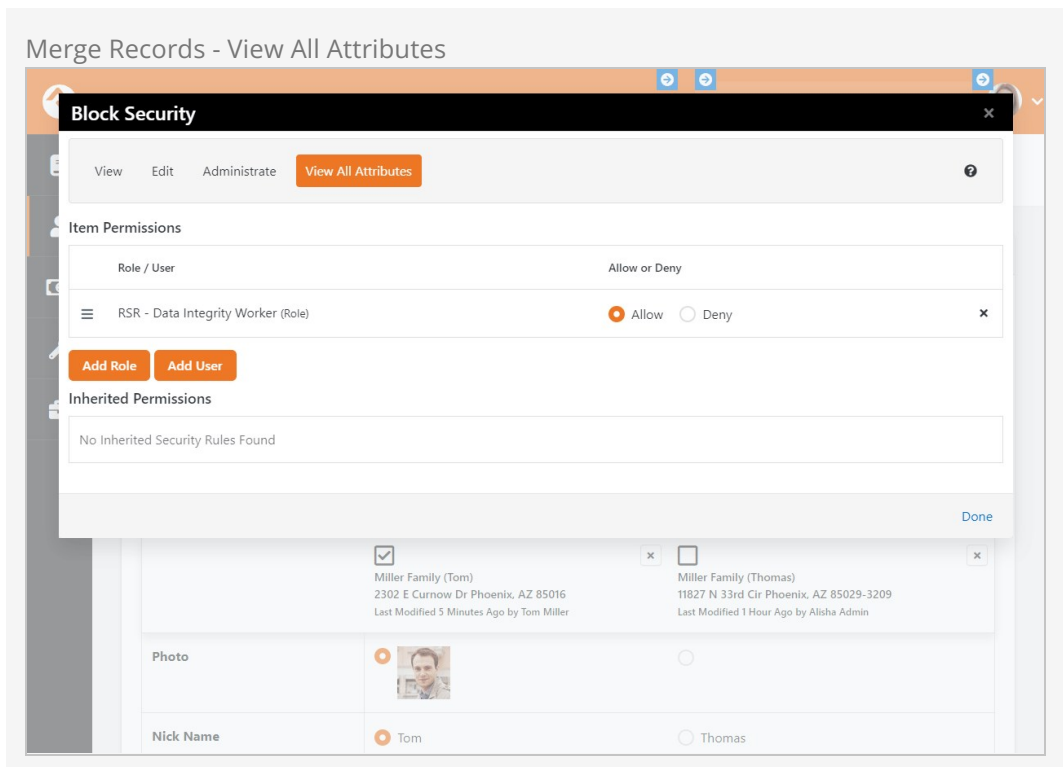
The first thing you'll want to do on this screen is pick the master record. This is the

record that the others will be merged into. Then, look at each row and ensure that the correct value is selected. If a value isn't correct on the master record, you can choose to select the data from one of the other records.

Merging Addresses

The address displayed at the top of the merge block is shown for reference only. After selecting the primary/master record, you'll still need to pick which address to carry forward. If the address you pick is not the current address for the primary record, the current (pre-merge) address will be moved to a Previous Address after the merge is completed.

If you don't have permission to view an attribute that has a conflicting value, you'll receive the warning message pictured in the screenshot above, near the top of the merge block. If staff members responsible for merges shouldn't have access to attributes outside of a merge context, we recommend using the "View All Attributes" Security Verb as pictured below. Roles or individuals with this access will be able to view any attribute values associated with the records being merged, and can select the value to keep, but will not be able to view those attributes in other contexts (like the Person Profile) without additional security.



When you're done, click the `Merge Records` button and you'll be taken to the *Person Profile* page of the merged master record.

If two records exist with the same name, in cases where either of them has an email address and either of them has an associated user login, Rock will display a hijack

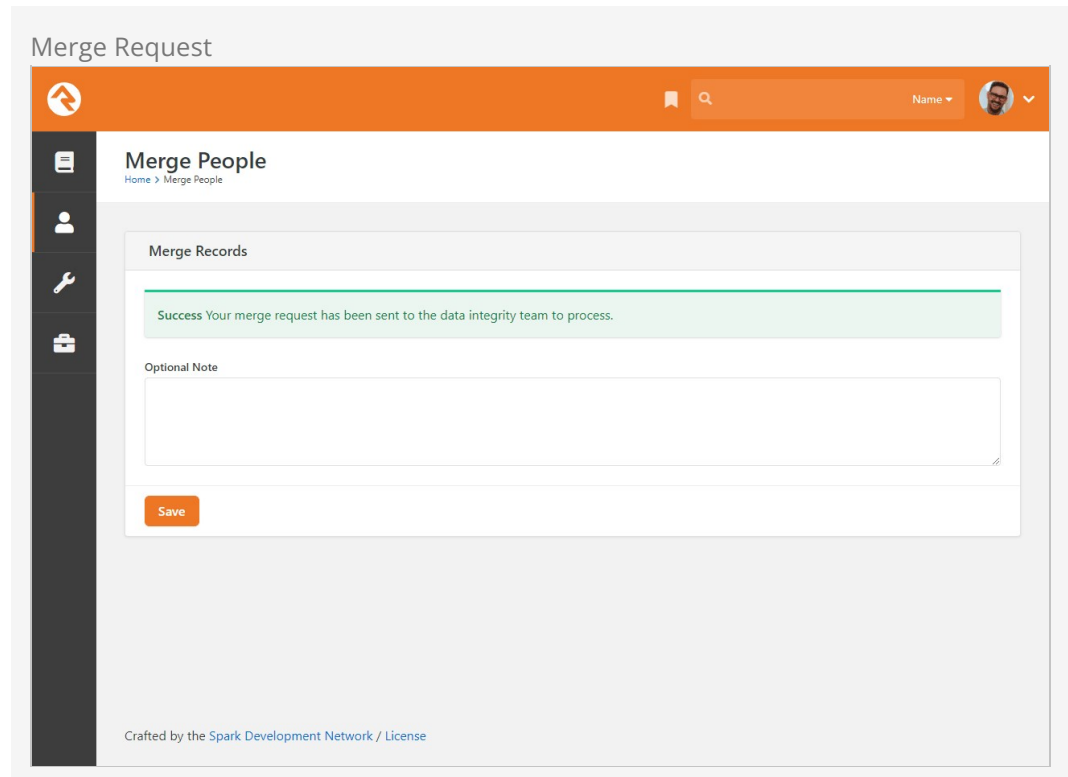
warning message. For security purposes it's very important that you verify the validity of email addresses associated with either record, and remove invalid emails *before* you merge the records. Failure to delete invalid email addresses prior to the merge may put a person's information at risk of being exposed to someone else.

After the records are merged, the person will be required to confirm their email address the next time they log in. The *Reset Login Confirmation* option comes enabled out of the box, but you can disable it in the block settings of the *Merge People* screen.

Merging Records and Family Attributes

If two people being merged have differing family attribute values, the merge will display both values and allow you to select which should be used. If the family name and/or campus are different, both values will be displayed in the *Family Values* section, and you can select which should be used. All other differing family attribute values will be displayed in the *Family Attributes* section. Note that any changes made will update that value for the family, which will affect every member of the family. To learn more about family attributes, see the *Family Attributes* section below.

If you don't have Edit access to the merge block, you'll see a message noting that your request to merge a person has been saved. This *Merge Request* will be listed under `Tools > Data Integrity > Merge Requests`. Out of the box Rock only allows the members of the *RSR - Data Integrity Worker* to complete merges.



Merging Records Without Enough Security

If you have access to merge but don't have enough security access to view things such as attributes, you won't be able to choose which item survives when the records are merged. Rock will take the value from the primary person/family you choose at the top of the merge panel. This could lead to unintended data being selected during the merge. You should consider giving individuals who process merge requests 'View All Attributes' access as described above.

Account Protection Profiles

Every person in Rock has an *Account Protection Profile*. This is a way to classify person records, to protect certain accounts from hijack attempts. A person's *Account Protection Profile* is calculated each night by the *Process Elevated Security* job and will be one of the following values:

0. **Low:** There are no risk items associated with this person.
1. **Medium:** The person has a login for Rock.
2. **High:** The person meets one or more of the following conditions:
 - Has an active Scheduled Financial Transaction
 - Has a saved Payment Account
 - Is in a security role with a "High" Elevated Security Level
3. **Extreme:** The person is in a security role that has an Elevated Security Level of "Extreme"

These *Account Protection Profile* levels are used by the Security Settings described in the [Admin Hero Guide](#).

When performing a merge, if the person being merged has an *Account Protection Profile* of Medium or higher, you'll see a message when attempting to merge the record.

Merge with Elevated Security Warning

The screenshot shows the 'Merge People' interface. At the top, there is a navigation bar with a home icon, a search icon, and a user profile. Below the navigation bar, the page title is 'Merge People' with a breadcrumb 'Home > Merge People'. The main content area is titled 'Merge Records' and contains an 'Add Another Person' dropdown menu. A prominent red warning banner reads: 'CRITICAL SECURITY ALERT: One or more of the records has a login. This could be an attempt to hijack the account. Additionally, this person will be prompted to reconfirm before they can login. ADDITIONALLY, ONE OR MORE OF THESE RECORDS IS A MEMBER OF A SECURITY ROLE WITH ELEVATED PRIVILEGES.' Below the warning, there are two merge records. The first record is selected with a checkmark and shows details for 'Decker Family (Ted, Cindy, Noah, Alex)' with address '11624 N 31st Dr Phoenix, AZ 85029' and 'Last Modified 3 Days Ago by Alisha Admin'. The second record is 'Decker Family (Ted)' with 'Last Modified 9 Minutes Ago by Alisha Admin'. Below the records, there are fields for 'Photo', 'First Name', and 'Last Name' with radio buttons for selection.

There are restrictions on who can merge records that have High or Extreme *Account Protection Profiles*. This is controlled by your Security Settings configuration. If the person performing the merge doesn't have the needed security, they'll be presented with a message as pictured below and will not be able to complete the merge.

Merge with Extreme Record

The screenshot shows the 'Merge People' interface. At the top, there is a navigation bar with a home icon, a search icon, and a user profile. Below the navigation bar, the page title is 'Merge People' with a breadcrumb 'Home > Merge People'. The main content area is titled 'Merge Records' and contains an 'Add Another Person' dropdown menu. A yellow warning banner reads: 'A record on this merge request has an Account Protection Profile of 'Extreme'. This will require an individual in the 'RSR - Rock Administration' role to perform the merge.' Below the warning, there are two merge records. The first record is selected with a checkmark and shows details for 'Miller Family (Tom)' with address '2302 E Curnow Dr Phoenix, AZ 85016' and 'Last Modified 9 Minutes Ago by Alisha Admin'. The second record is 'Miller Family (Thomas)' with address '11827 N 33rd Cir Phoenix, AZ 85029-3209' and 'Last Modified 5 Minutes Ago by Alisha Admin'. Below the records, there are fields for 'Photo', 'Nick Name', 'Connection Status', and 'Birth Date' with radio buttons for selection.

Recommendations for Life Events


Below are some suggested processes for common life events. While these are just suggestions, you'll want to have documented processes for each of these events so your staff handles them consistently.

Coming Soon!

In an upcoming update to Rock, you'll be able to automate some of these processes. Keep your eye on Rock's workflow features as they are released.


Death of a Family Member

The death of a loved one is a very hard thing. It's made even harder, though, when the remaining person is constantly reminded of their loss. When someone notifies your organization about a death, we suggest taking the following steps:

1. Mark the individual's record as *Inactive* with the reason of *Deceased*.
2. Move the deceased individual to a new family by clicking the  button from the *Edit Family* page.
3. Remove all contact information from the record.
4. Add a note to the deceased person marked as *Alert* with the text of "Deceased" and the date they died.
5. If married, create a *Previous Spouse* relationship back to the spouse. It's generally best to leave the surviving spouse as *Married* as a matter of respect unless they indicate otherwise.
6. Don't forget to talk to your finance department about how to deal with regular contribution records. We recommend that the contributions assigned to the deceased person be moved to the surviving spouse. This can be done from the *Person Profile* page.

Divorce

Before making these changes, be sure to discreetly get as much information about the family situation as you can. This will ensure you get the information right and not create an awkward situation in the future.

1. From the *Edit Family* screen, click the  icon for one of the adults to move them to a new family.
2. Depending on the custody status, you may want to ensure the children are in both

families. To do this, find the new family and add any children to it, without removing them from their current family.

3. Create a *Former Spouse* relationship to both adults.
4. Update phone and address information.
5. Add any name changes on the *Edit Individual* screen (under *Advanced Settings*).
6. Update the *Marital Status* for both individuals.
7. You may need to use the **Reassign Transactions** button to transfer financial transactions from one spouse to the other. This can be found under the *Contributions* tab in the *Person Profile* page, at the bottom of the transaction list.


Marriage

After the wedding, you'll want to complete the following steps.

1. Go to the primary record (usually the husband or person with the primary address).
2. From the *Edit Family* screen click the **Add Person** button and select the individual from the database, removing them from their current family.
3. Update the female's title to "Mrs."
4. Update both adults' marital status to "Married."
5. Add the anniversary date, if known.
6. Add the wife's maiden name as a previous name on the *Edit Individual* screen (under *Advanced Settings*).

Child Turns 18

When a child reaches adulthood it's a good idea to move them to a new family, even if they are still living in their parents' home.

1. From the *Edit Family* screen, click the  icon.
2. Create *Parent* relationships back to the parents.
3. Update the individual's status from *Child* to *Adult*.

You can use the notes to document the reasons for the changes. While it may seem obvious now, it won't in a couple of weeks, especially for the next person who views the records.

Process Adult Children Job

Rock ships with a job that updates children to adults automatically, which not only makes things easier for you but also helps keep the person data in Rock accurate. The job only processes people who have a child role in one or more families, but also is of an "adult" age. The default adult age in Rock is 18, but you can change this. There are several settings the job uses to process individuals, which you can manage by navigating to [Tools > Data Integrity > Data Automation | Move Adult children](#). With these settings, the job looks at all the families a person belongs to and their role in each of those families, then decides whether or not the person should be updated as an adult and/or added to a new family.

You can learn more about jobs and how to configure them in the Jobs chapter of the [Rock Admin Hero Guide](#).

Person Notes

You just can't take too many notes! Documenting key conversations and important details is vital to the success of your organization. Here are some examples:


- Information on life events like hospitalization of a loved one
- Interest in a specific serving area
- Likes or dislikes (i.e., preferences related to your organization)
- Time and date of phone calls


These notes help the staff to be on the same page and help make an organization of any size feel small and caring. There are different types of notes:


Types of Notes

Write a note... 4


Alert: Personal Note

1  **Alisha Marble**
● Personal Note · 8 years ago
Called Ted and heard that his mother is in the hospital and could use prayer.

2  **Alisha Admin**
● Personal Note · now
Ted expressed interest in joining the Ushers team.

3  **Alisha Marble**
● Personal Note · 8 years ago
Talked to Ted today about starting a new Young Adults ministry

- 1 Alert Note**
Used to alert viewers of very important topics. These note types will always remain at the top of the list.
- 2 Normal Note**
These are the default note type. They are viewable by anyone who has been given access to them.
- 3 Private Notes**
These notes are viewable only by the person who entered them.
- 4 Add Note**
Click in this area and start typing to add a new note.

Sometimes you might want to enter a note that only you can see. There are a couple of ways to do this. The first, and easiest, is to make the note private. When you do this, you'll be the only one who can view it. If you would like to share the note with a limited group of people (like *Pastoral Staff*), click the  button and enable viewing for only the *Pastoral Staff* group.

Note

Because we can't add security to an item before it's been created, the security icon will only be visible after the note is saved.

Adding A Note

✳

Alert
 Private
 Pin to Top
Cancel
Save Note

Alert: Personal Note

✳

Alisha Marble

Personal Note · 2 months ago

Called Ted and heard that his mother is in the hospital and could use prayer.

✳

Alisha Marble

Personal Note · 3 weeks ago

Talked to Ted today about starting a new Young Adults ministry

✳ Editor Window

This is where you can enter notes and mark them as Alert or Private. If neither Alert nor Private are checked, the note can be seen by anyone with security to view person notes. You can also select *Pin to Top* to keep the note at the top of the list.

Sometimes a note is very important, and you want everyone to see it. Checking the *Alert* checkbox will keep the note at the top of the list and highlight it in red. These types of notes can be used to warn staff of a potential issue.

Warning

If you're creating an alert note, then it's probably related to unpleasant or sensitive circumstances. As you consider your wording for an alert, try to be as discreet as possible while still getting your point across.

We mentioned above that *Alert* notes will stay at the top of the list of notes. Below the *Alert* notes will be notes marked as *Pin to Top*. If there are multiple Alert, Pin to Top, or regular notes, then the most recent notes will be displayed first.

Security for Notes

It's important to understand who will be able to see or edit notes. We touched briefly on note security above, but here is a full breakdown of what you can expect.

- **Private:** Private notes are only viewable by the creator. No one else, no matter what their permissions are, can see them.
- **Approve:** The Approve security verb lets you approve notes. You can view any notes for which you have Approve permission.
- **View:** You can view a note if you have View security to the note itself. You can also

view notes you have created or modified in the past. Lastly, you can view a note if you have rights based off of the Note Type.

- **Edit:** Edit access gives you rights to add a new note and to edit notes that you have created. Edit access DOES NOT give you rights to edit notes that were created by someone else.
- **Administrate:** Administrate permission will let you edit notes, including notes you did not create.

Badges

Badges are one of Rock's most exciting features. As you add more and more information into Rock, you can quickly become overwhelmed with the amount of data you collect on a person. Badges allow you to summarize key points of information in a graphical way. This allows you to quickly scan the page and familiarize yourself with the individual.

Badges come in two forms: an iconic badge that shows in the *Badges* block and a label badge that shows in the *Person Bio* area. While they look very different, they share the same configuration and settings.

Note

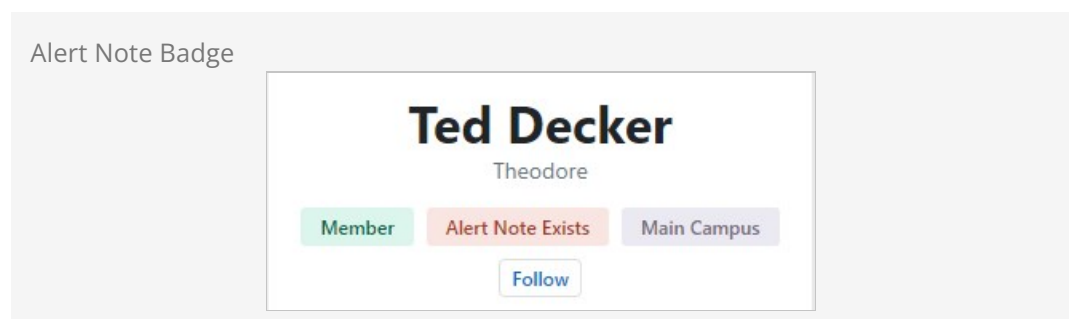
There may be some confusion about when to add a label to the *Person Bio* area and when to add a new badge. We suggest that if you're categorizing a person into general groups that you use a label in the bio section. If you're describing a person's activity or achievements, then consider a new badge.

Let's look at the badges that come pre-configured and the steps to add your own new badges.

Pre-configured Badge Types

Rock comes with several badge types pre-configured and ready for you to use. That said, be sure to see the *Defining a New Badge* section below to learn how to set the badges up and add them to a person's profile. While some of these badges are pre-installed and already visible for you when you first log into Rock, other badges exist as a badge *type* and will require you to configure and add them before they are visible.

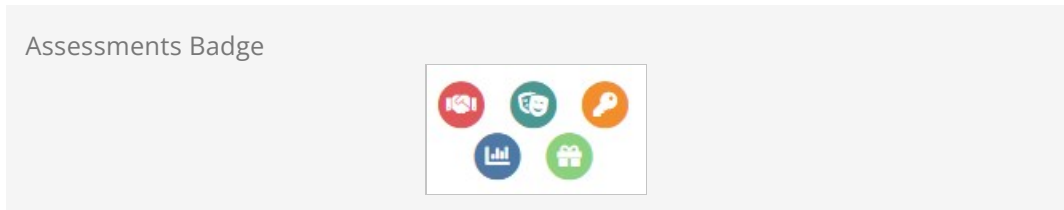
Alert Note Badge



This badge displays when a note for the person exists that's marked *Is Alert*. This is helpful when you want to highlight at the top of the page that an important note should be read below. This badge has the following settings:

- **Note Types** - Determines which note types to consider as alerts
- **Badge Content** - The HTML to display when an alert note exists

Assessments



This badge displays assessment information. The individual icons within the badge will be filled in with color if the assessment has been taken. You can hover over the badge to see a summary of results, from the following assessments:

- **Conflict Theme**
- **EQ Self Aware**
- **Motivators**
- **DISC**
- **Spiritual Gifts**

There's so much to know about assessments in Rock that we gave it its own book. Check out [Assessments](#) for all the details you'll need.

Attending Duration



The *Attending Duration* badge shows you how long the individual has been a part of the organization. Using the *First Visit* person attribute it calculates the time span that the person has been attending and then summarizes it by either weeks (if less than 8), months (if less than 24) or years. If the person has started attending in the last week it shows the value as *New*.

Person Signal Type

Person Signal Type



The *Person Signal Type* badge shows how many and what type of Person Signal Types are assigned to an individual. To learn more about Person Signal Types, see the Person Signal Types chapter below.

Personal Devices

Personal Devices



The *Personal Devices* badge shows how many devices Wi-Fi Presence has detected for the individual. Clicking on the badge will take you to a screen where you can view all the devices linked to the individual. From there, you can select a specific device to view all the visits that device has made to your organization's Wi-Fi network.

16 Week Attendance

16 Week Attendance Badge



It's often useful to measure how often a family attends. This information will be displayed on the *16 Week Attendance* badge. The top bold number is the number of times the family has engaged (e.g., checked in a child, served) in the last 16 weeks.

You'll find that the graph shifts a bit as you look at the various individuals in the family. On adult records the graph shows a summary of all the individuals in the family. A child's record shows just their check-in events.

Family Attendance

Family Attendance Badge

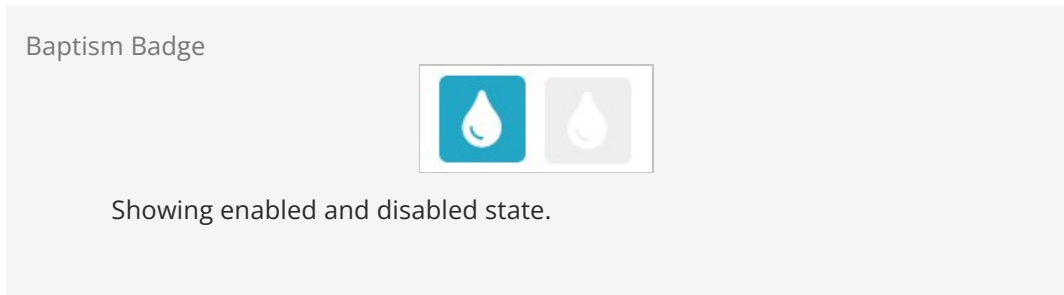


While the *16 Week Attendance* badge gives you a concrete metric, the *Family Attendance* badge gives you a wider picture of the attendance patterns over the last 24 months. With this chart, each bar represents one month. The taller the bar, the more often the family attended a weekend service that month. This chart gives you an

excellent picture of the attendance trend.

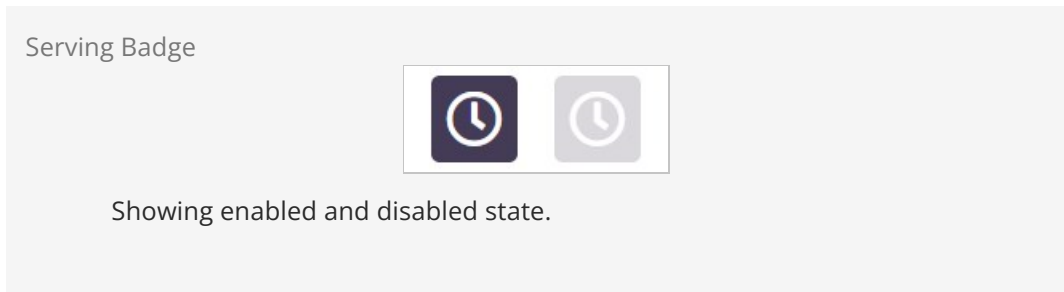
The bar graph on an adult will aggregate attendance for the whole family, while child records will only show attendance for the specific child. However, the badge's configuration can be updated to show individual attendance for adults too.

Baptism Badge



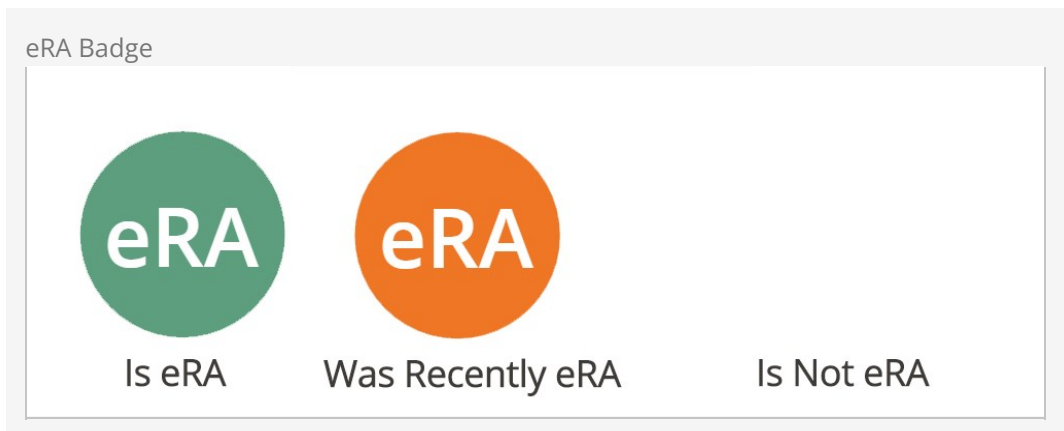
The *Baptism Badge* shows if the individual has been baptized, using the *Baptism Date* person attribute. If the person has been baptized, the water droplet will be bright, and the rollover text will show the date of the baptism. If they haven't been baptized yet, the droplet will be light.

Serving Badge



Similar to the *Baptism Badge*, the *Serving Badge* shows if the person is a member of a serving team. If so, the clock is dark. Otherwise, it's light.

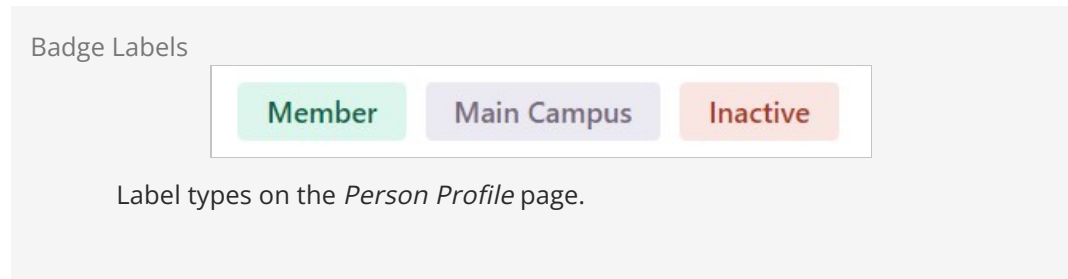
eRA Badge



This badge shows the eRA status of the current person. See the [Person And Family](#)

Analytics chapter for more information on this badge.

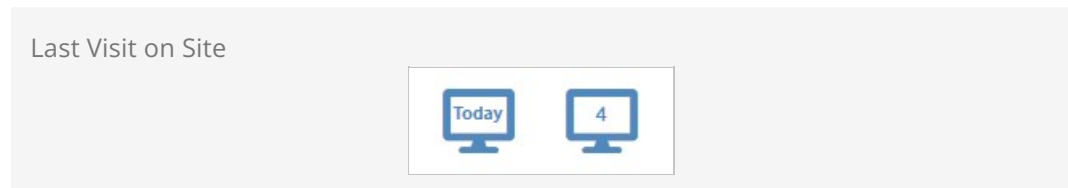
Labels



Each label in the *Person Bio* area indicates a separate badge. These badges show:

- **Connected Status:** Shows the individual's connected status in green.
- **Campus:** Shows the individual's campus in purple. This is hidden if only one campus exists.
- **Record Status:** This label only shows if the person is marked *Inactive*.

Last Visit On Site



The *Last Visit on Site* badge displays the number of days since a person's last visit to a selected site. If the person hasn't visited the site, it won't be displayed. The badge can be configured to link to a page that displays the visitor's sessions and pages that they visited. Rock comes installed with this badge configured for the external site.

Defining a New Badge

You define new badges under `Admin Tools > General Settings > Badges`. Here you'll see a list of currently configured badges. You can also choose to create a new badge from this screen.

Badge List

Home > General Settings > Badges

Badges

Badge List

Name	Type	Component	Description		
Connection Status	Person	Lava	Displays the connection status as a label.	🔒	✕
Top Person Signal	Person	Top Person Signal	Shows the top person badge and the number of signals.	🔒	✕
Personal Devices	Person	Personal Device	Badge showing the number of personal devices that have been associated to a person.	🔒	✕
Assessments	Person	Assessment	Shows the person's Personality Assessments.	🔒	✕
Group Requirements	Group	Lava	Shows if a group has requirements.	🔒	✕
DISC Personality Assessment Result	Person	DISC	Shows a small chart of a person's DISC personality assessment results and links to the details of their assessment.	🔒	✕
Campus	Person	Campus	Shows the campus of the individual.	🔒	✕
Record Status	Person	Lava	Displays label if record status is inactive.	🔒	✕
Last Visit on External Site	Person	Last Visit On Site	Shows the number of days since the last visit to the external site and links to the details of the person's page views.	🔒	✕
Attending Duration	Person	Attending Duration	Displays how long the individual has been attending.	🔒	✕
Family Attendance	Person	Family Attendance	Shows a chart of the attendance history with each bar representing one month.	🔒	✕
Family 16 Week Attendance	Person	Family Weeks Attended In Duration	Shows a the number of times a family attended in the last 16 weeks.	🔒	✕
eRA	Person	Lava	Shows if someone is an eRA.	🔒	✕
Baptism	Person	Lava	Shows if individual has been baptized.	🔒	✕
In Serving Team	Person	In Group Of Type	Show if individual is in a serving team.	🔒	✕

50 500 5,000 15 Badges

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The screenshot shows a web interface for adding a badge. The page title is 'Add Badge'. The breadcrumb trail is 'Home > General Settings > Badges > Badge'. The form contains the following fields:

- Name**: A text input field with a red asterisk indicating it is required.
- Description**: A large text area for entering the badge's description.
- Entity Type**: A dropdown menu.
- Badge Type**: A dropdown menu.
- Qualifier Column**: A text input field.
- Qualifier Value**: A text input field.

At the bottom of the form are 'Save' and 'Cancel' buttons. The footer of the page reads 'Crafted by the Spark Development Network / License'.

When you add a badge you'll provide it with a name, description, entity type and badge type. You can choose to associate the badge with any entity, like a person or a group. The entity type you choose will affect the badge type options available to you. Some badge types require additional configuration.

Let's look at each badge type and how it can be used.

Achievement

A badge of this type will be displayed when a person has earned the provided Achievement Type. The badge's icon will be the icon configured for the Achievement Type or will be a generic medal icon if the Achievement Type doesn't have an icon configured.

Steps

This badge type allows you to display progress in a step program. You can choose which step program to display and the *Display Mode* (normal or condensed) for the badge icons. If you want to learn more about Steps badges, there's a whole chapter for them in our [Engagement](#) manual.

Assessment

This type of badge shows the results of assessments taken through Rock. This badge is pre-installed on person profiles out of the box.

Streak Engagement

If you have any streak types set up, you can create badges for them. Badges of this type are somewhat similar to the family attendance badge. This is a great way to quickly and easily show Streak data (in the form of a bar graph) for a person on the *Person Profile*

page.

Giving

This badge type will show up when the person has given at least the amount you specify to specified accounts, within a specific date range. You get to use Lava to determine how the badge looks; by default, it's an icon type badge.

Attended Group of Type

This badge type will show up when the person has attendance in a group of the type you specify, within a set date range. You get to use Lava to determine how the badge looks; by default, it displays the same icon as the group type uses.

In Data View

This badge can be reused any time you have a Person based Data View that contains the people you want to badge. You provide a *Data View*, and it will show the badge if they are included in it. The icon that's used for the badge is whatever you wish because it comes from whatever HTML or Lava you put into the Badge Content setting. Note that the *Person* will be included into the Lava merge fields so you can use any property of the person in the display logic of your badge.

This badge type can also be used with *Groups* or other entities besides *Person*.

Top Person Signal

A badge of this type will show the top signal that you have stored for the person whose profile you're viewing. Read more about signals [here](#), but remember that signals are ranked. This badge will examine all the signals you have for a person and display the highest-ranked one.

Personal Device

A badge of this type will show how many devices are linked to the person and take you to the page you specify in the badge when it's clicked, so you can see their devices or interactions.

Interaction in Range

A badge of this type will show how many interactions the person had with a specific channel, within a specific date range. When clicked, it will take you to the page you specify (usually the interactions page for the channel, but it could also be a report or another page you create) so you can get more information.

This is useful to see how many times someone visited your website in the last month, or how many communication interactions (received, opened, clicked, etc.) were seen from them in the last week.

Geofenced By Group

The *Geofenced By Group* badge displays a label of the group name that has a geo-fence that the individual lives within.

Alert Note

This badge type will show up when a type of note which you specify has been added to

the entity and marked as "Alert".

Attending Duration

Like the *Campus Badge*, the *Attending Duration* is fixed in nature and isn't meant to be re-used.

Campus

The *Campus Badge* displays a label of the individual's current campus. There's not much more it does, so it's re-use is very limited. The *Campus Badge* isn't shown if you only have one campus in your system.

Family Attendance

This badge drives the *24 Months of Attendance* chart. It also provides several settings to allow you to customize it. For instance, if you find the animation on the bars distracting, you can disable it. You can also change the duration from the default of 24 to whatever you wish.

Family Weeks Attended In Duration

This badge powers the *16 Week Metric Badge*. It's probably not that re-usable, but you can change the duration from 16 weeks to whatever value you desire.

In Group Of Type

Unlike the others, this badge type was made to be used often. The *Serving Badge* uses this badge type. Here's how it works. You provide a *Group Type*, and it will show the badge enabled if they are a member of a group of that type or disabled if they aren't. The icon that's used for the badge comes from the *Group Type's* "Icon CSS Class". You can also set the color of the icon.

You can use this badge for all types of groups (think Bible Studies, specific classes, etc.)

In Group with Purpose

A badge of this type will show an icon if they are a member of a group with a specific purpose specified. Out of the box, the most likely purpose you could use this for would be "Serving Area", but since you can create any number of purposes, you can have a different badge for any of them. You don't even need to know Lava to configure badges of these types; just specify the icon and the color you want it to have.

Last Visit on Site

This badge type drives the *Last Visit on Site* badge. The *Last Visit on Site* badge displays the number of days since a person's last visit to a selected site. It's unlikely that this badge type can be repurposed for any other use, but you can choose which Site should be tracked and details of which pages were viewed.

Lava Badge



The *Lava Badge* is the Swiss Army Knife of badges. This badge takes a Lava template and renders it to the screen. You can learn more about Lava [here](#), but for now think of it as Microsoft Word's mail merge feature for web development. The badge takes the data on the entity and merges it with your template.

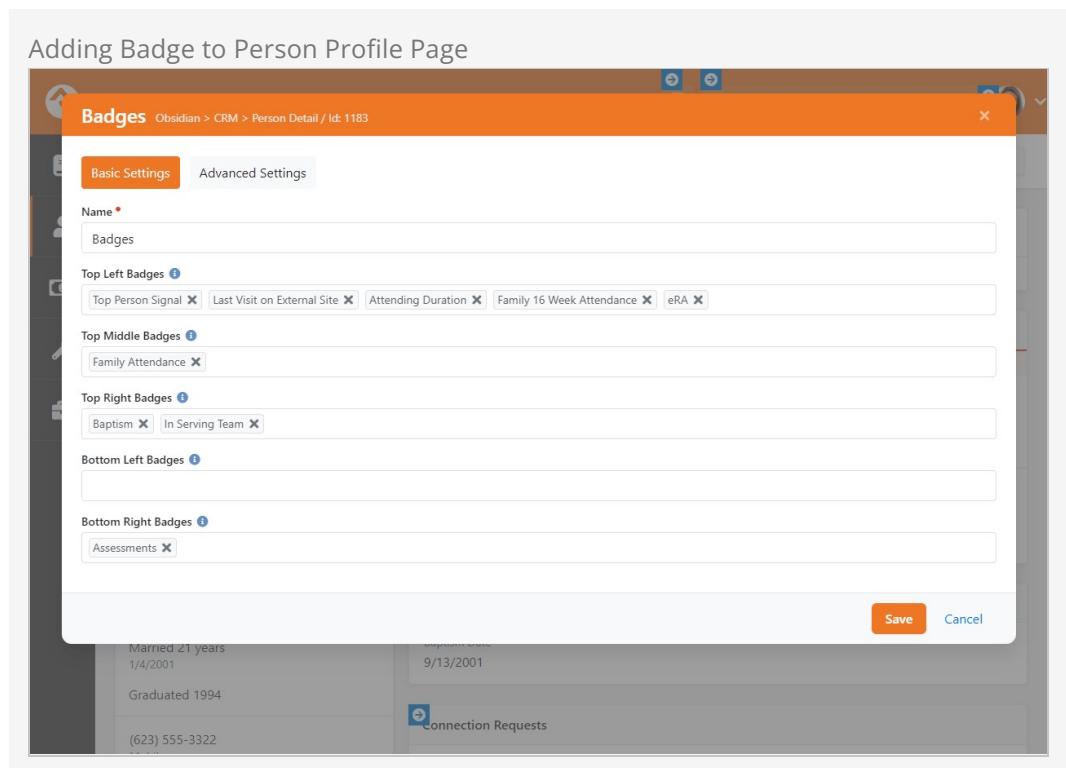
Many of the label badges and the *Baptism Badge* use this badge type. Feel free to look at their templates to see how they work. You can develop some very powerful badges using this badge type.

Note

As you create new badges, note the order they appear on the list. Badges will display in this order when you place them on the *Person Profile* page.

Adding Badges to The Person Profile Page

Once you've defined a new badge the next step is to add it to the *Person Profile* page. From this page click the  button in the *Admin Toolbar*. This will display a block properties button for each block on a page. Hover over the badge block and select its  button. Finally, select the badge you wish to add in the container you want to see it in (e.g., Top Left, Bottom Right), and press .




Warning

As you can see, badges are a very powerful way to display useful data about an individual. There is such a thing as too much of a good thing. Adding too many badges can diminish their value by overwhelming the viewer.

Viewing Badges Using Custom Security Roles

If you create a new security role that should be able to view badges, there's a little extra configuration you'll need to do for the badges to work properly. Without the right setup


in place the person will be able to see the badge icons, but the icons won't light up as expected.

Navigate to `Admin Tools > Security > Rest Controllers > Badges` and click the  icon to add the new role to each badge that the role should be able to view.

Also don't forget that the person will need permissions for viewing the parts that make up a badge. For instance, a person needs permission to view the Baptism Date attribute in order for the Baptism badge to appear properly. The person also needs permission to view the badge itself.

Tags

If you're familiar with tags in photo-sharing sites like Flickr or notes applications like Evernote, then you already understand how to use them in Rock. Tags offer a way to categorize people, content channels or any other entity type. You can literally tag anything. For the purposes of this manual, we'll be talking about tags as they relate to the Person entity. Maybe you want to label a person as a future volunteer for recruiting or maybe you'd like to tag active military personnel. While you could create a group, that approach might be a little too cumbersome if you simply want to use it as a label for a person, so you might consider a tag instead. This helps keep your list of groups to a minimum, making them easier to manage.

Tags are added to a person in the bio section of the Person Profile page. You can add a tag to a person by clicking the  icon in the bottom-left portion of the badge block and typing in the name of a tag directly onto the page. To save the tag link, simply press enter (i.e., there is no "Save" button). If a tag already exists, it will be displayed in the auto-complete area. If you type a new tag, it will confirm that you wish to create a new tag before adding it.

Your Tags vs. Our Tags

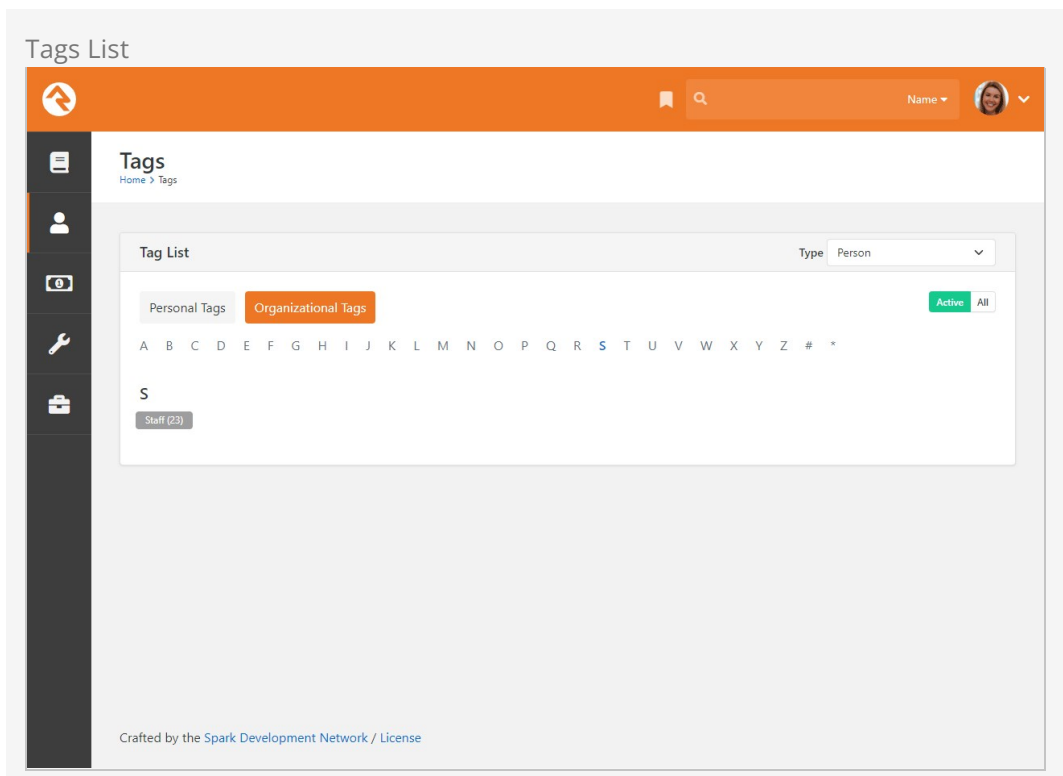
There are two types of tags in Rock, personal tags and organizational tags. Personal tags are only seen by the creator, while organizational tags are viewable by everyone in your organization. When you create new tags, they are created as personal tags by default, so they can only be seen by you (and your system administrator). Your administrator can promote personal tags to organizational tags upon request. When they are promoted, they keep all the people tagged, so it's a good idea to get started with a personal tag.

Tip

Instead of requesting a new organizational tag from your administrator and waiting for it to be added, consider creating a personal tag yourself and then requesting that it be promoted to an organizational tag.

Viewing Tags


To view all the individuals in a specific tag, go to [People > Tags](#).



The *Tag List* page displays all your tags with the option at the top to switch between personal and organizational tags. Clicking on a specific tag will display all the individuals in the selected tag. You can also manage the individuals within a specific tag by adding or removing them from the list here (as opposed to using the person profile for each person individually). If you want to filter tags even further, you can select a type from the *Type* dropdown menu near the top-right of the block.

Administrating Tags

Tags can be managed by an administrator under [Admin Tools > General Settings > Tags](#). The two most common reasons to administrate tags are to delete tags that no longer serve a purpose and to promote personal tags to organizational tags.

Administrators, or those with tagging rights, can also secure tags, limiting who can view them. Add security by clicking on the  button in the tag's detail screen. This applies only to organizational tags, since personal tags are already limited to the tag creator and administrators by default. For more information about security settings, see the [Securing Rock](#) chapter of the [Rock Admin Hero Guide](#).

Tag Security

Some administrative tasks related to tags (like deleting them) operate off the security of the Entity. Be sure to set the entity security for tags ([Admin Tools > Security > Entity Administration > Tag](#)) to reflect your needs. Out of the box, the *Staff Workers* and *Staff Like Workers* have permissions to view, edit and delete tags.

Person Signal Types

Signals are discreet flags that can be assigned to a person to bring attention to a matter. As with most aspects of Rock, signals are highly customizable. They can be used to flag anything from security concerns to high-level lay leads to anything and everything in between. Some examples of how your organization might use signals are:

- Safety and Security - to flag someone who shouldn't be around children or on campus.
- Pastoral Care - to bring attention to someone who needs extra or specialized care.
- Administrative Tasks - to alert staff of a missing form or other administrative matter.

Signals differ from tags in that tags are meant only to provide information while signals are meant to prompt you to further action. They're a quick, visual way of saying, "Hey, there's something here you should know about."

Person Signal Types

Home > Security > Person Signal Types

Person Signal Type List

Color	Name	Description
Alert	Alert	

50 500 5,000 1 Signal Type

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Signals are managed from [Admin Tools > Security > Person Signal Types](#). You can create as many signals as you need for your organization, giving each a specific color and icon

to differentiate them. As you set your signals up, keep the following in mind:

- The list order of the signals in the *Person Signal Types* screen is important. The color of the top-most signal is used as the color for the *Person Signal Type* badge displayed on the *Person Profile* page, so it's best to keep the most important signal types at the top of the list.
- It's best to use general names for signals. For example, "Safety Team Recommendation" is general without being too vague. This helps to avoid the problem of labeling people, something that not only isn't kind but could also pose future legal issues. Consider using an appropriate color and icon for signals as well.
- Configuring the security settings for each signal type is essential. Signals aren't meant for everyone to see. Likewise, the information provided on the *Person Profile* page (particularly in the tabs subsections) is sensitive and should only be viewed by those with the appropriate security permission.

The screenshot shows a web interface for configuring signal types. The main heading is "Person Signal Type Detail". Below the heading is a form with the following fields:

- Name**: A text input field with a red asterisk indicating it is required.
- Description**: A large text area for entering details.
- Color**: A color selection field with a red asterisk and a small square icon next to it.
- Icon CSS Class**: A text input field for specifying a CSS class.

At the bottom of the form are "Save" and "Cancel" buttons. A footer note at the bottom of the page reads "Crafted by the Spark Development Network / License".

For individuals, signals are managed on the *Security* tab of the *Person Profile* page. Each signal is assigned a type, owner, expiration date, and note. The owner is the person who should be contacted for follow-up details on the signal. Rock defaults the owner to the person currently logged in.

When a person is assigned a signal, it shows up as a flag-shaped badge on their *Person Profile* page. The color of the flag corresponds to the most important (highest in the configuration list) signal type they've been assigned. It also includes a number, which indicates the number of signals assigned to the person. Roll over the flag to quickly view

a list of which signals the person has. A detailed view of the person's signals is available in the *Security* tab of the *Person Profile* page. Signals are also displayed on group member lists, appearing as an icon (the icon you set when creating the signal) of the top-level signal beside the person's name.

Person Signal Type Badge

The screenshot shows a user profile for Bob Greggs. In the top right corner of the profile card, there is a signal badge consisting of a blue star icon, a red flag icon, and the number '1'. Below the profile card, there is a 'Signals' table with the following data:

Name	Owner	Note	Expiration Date
Alert	Alisha Admin	See a staff member before connecting to a team.	

Below the signals table, there is a 'Security Roles' table with the message 'No Groups Found'.

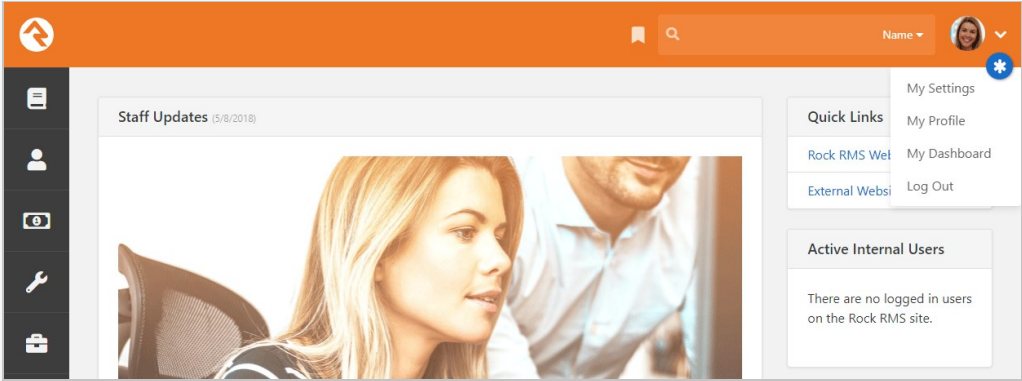
*** Signal Badge**

The flag here is red because the color associated with this signal is red. If Bob had two signals, and if the higher-ordered signal was assigned a yellow color, then the flag would be yellow and the number "2" would appear in the center.

My Pages

My... mine... some of our first words as a child. In Rock, though, the *My Pages* aren't a selfish grab for more, but rather a place where you can retreat to experience a personalized view of Rock. These pages are found under the login status on the internal site.

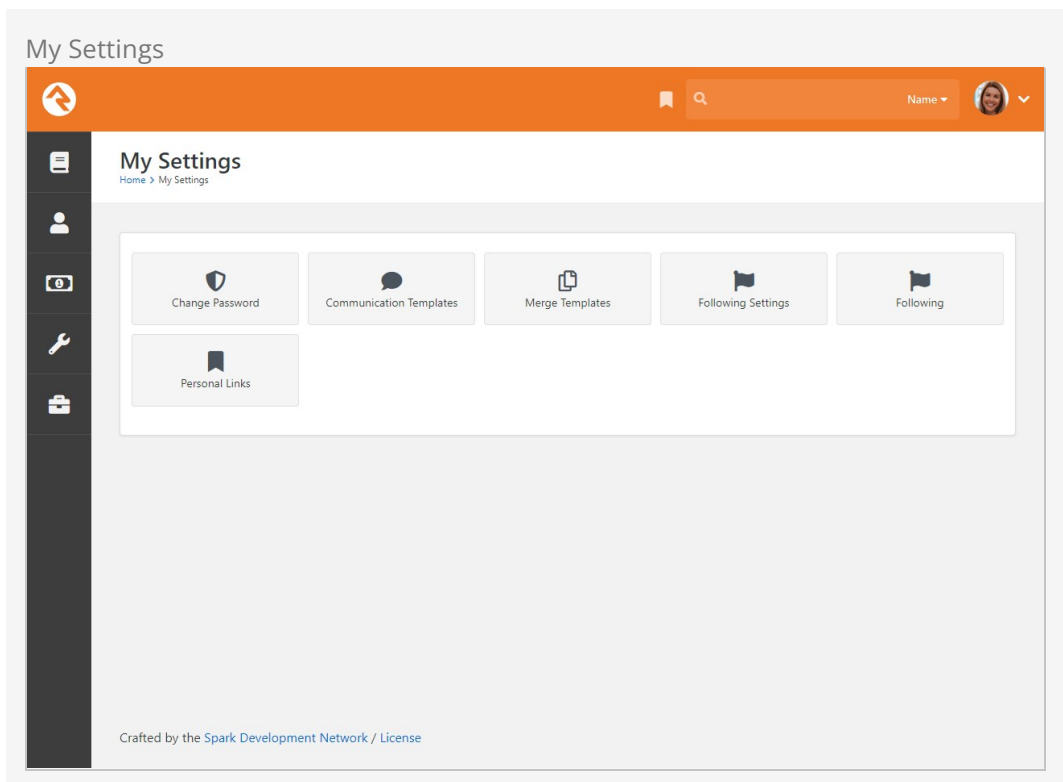
Finding My Settings



1 Photo
From here you can access the *My Settings*, *My Profile* and *My Dashboard* pages. We'll review each one in the sections below.

My Settings

Every person has a *My Settings* page on the internal site. This is a place where each person can manage their Rock settings. Pictured below is a listing of the settings available. Note that many plugins install new pages here, so your options may appear differently.



For details on the settings pictured above, see the [Rock Admin Hero Guide](#).

My Dashboard

My Dashboard is a central location for you to review all your assignments and open requests, as well as followed groups, items and suggestions.

My Dashboard
Home > My Dashboard

Alisha's Dashboard

1 My Tasks

Created	Title	Type
8/11/21	Outreach Coordinator (Approval Process)	Position Approval

2 My Connection Requests

Name	Opportunity	Last Activity	Last Activity Note	Status
Evans, Helen	Children's	Assigned (2 days ago)		No Contact

3 Following List

4 Followed Groups

Small Group
Marble Group

5 Followed Items

Registrations
Summer Camp 2021

6 My Open Requests

Photo Request: New Request
Position Approval: Outreach Coordinator

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1 My Tasks

This is a list of workflows that are active and currently assigned to you.

2 My Connection Requests

This is a list of connection requests that are active and assigned to you.

3 Following List

Click this button to view or manage the people you're following.

4 Followed Groups

This is a list of the groups that you're currently following.

5 Followed Items

Rock allows you to follow several types of entities. Here you'll find a list of all the items you've chosen to follow.

6 My Open Requests

This is a list of open workflows that you've initiated.

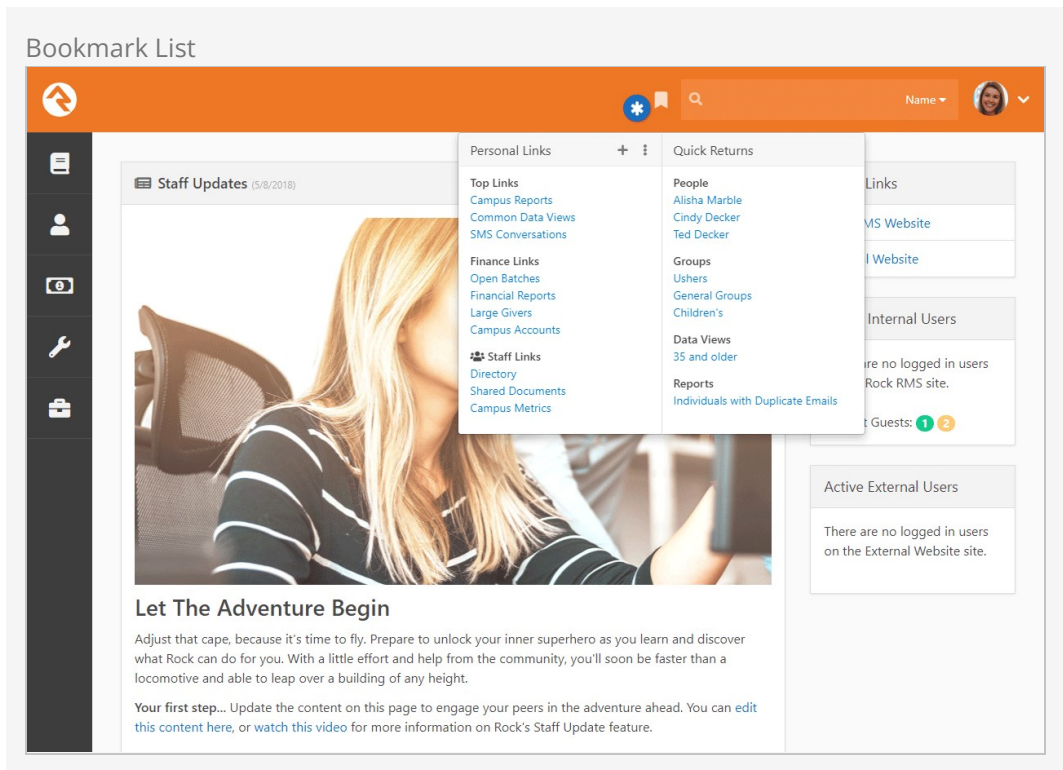
My Profile

This is simply a quick link to go directly to your *Person Profile* page.

Personal Links and Quick Returns

Rock's Personal Links feature makes navigating to your frequently used pages quick and easy. Just click the bookmark icon next to the search bar at the top of any page in Rock to instantly access your *Personal Links* and *Quick Returns*. This feature also allows

administrators to create shared groups of links for individuals in the organization.



Personal Links are pages that you've bookmarked inside Rock. The links are divided up into sections that you can name and reorder to your liking.

The *Quick Returns* are pages that automatically get bookmarked for you. For instance, viewing a group or a person's profile will add it to your list so you can get back to it easily. Items get automatically added to your Quick Returns from the following pages:

- Person Profile
- Data View Detail
- Report Detail
- Group Detail
- Financial Batch
- Workflow Detail
- Dynamic Data block (if enabled in the block's settings)

Dynamic Data Block


If you have pages with multiple dynamic data blocks on the same page, you might end up with multiple quick links you wouldn't expect if they all have *Enable Quick Return* enabled. In these cases, it's best to have only one dynamic data block on the page with *Enable Quick Return* enabled.


Quick Returns will keep up to 20 items from your browsing history. This could be 10 people and 10 groups, or five each of people, data views, reports and groups, or any other combination that adds up to 20. When you navigate to a new page the oldest item


in the list is removed, so you'll always see a list of your 20 most recent activities.

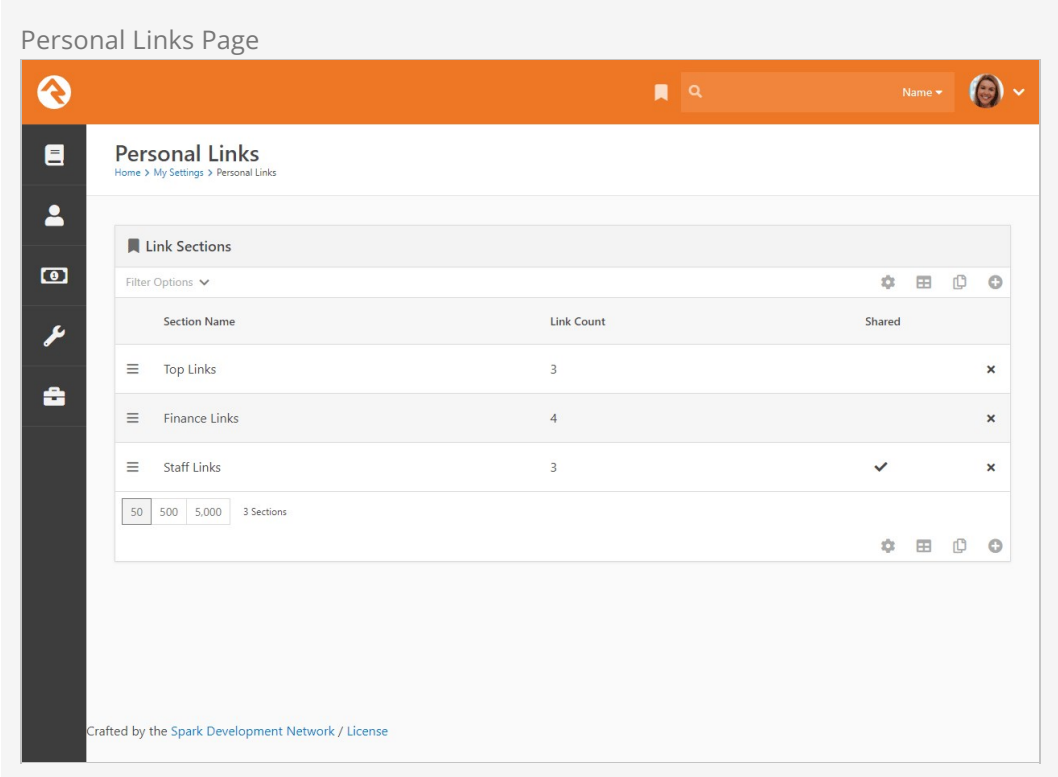
Administrators can add new types of pages to *Quick Returns* using the *AddQuickReturn* Lava filter.

Also, keep in mind that *Quick Returns* are stored in your browser. If you switch browsers, they will not follow you.

You can add any page in Rock to your *Personal Links*. When you're on a page you want to bookmark, simply open your *Personal Links* and click the  button, then select *Add Link*. The URL of the page you're on will automatically get copied to the screen, including any query string parameters. Feel free to modify this if you'd like.

You can also organize your links into sections. Think of sections as folders for your links. Adding a section is just like adding a link. Just click the  button and select *Add Section* to add a new section.

Your links and sections are managed using the *Personal Links* page. To access this page, you can click the  icon within the *Personal Links* window and select *Manage Links*, or you can navigate to the page by going to the *My Settings* page and clicking *Personal Links*.



The screenshot shows the 'Personal Links Page' interface. At the top, there is an orange header with a home icon, a search bar, and a user profile dropdown. Below the header, the page title 'Personal Links' is displayed with a breadcrumb trail 'Home > My Settings > Personal Links'. The main content area is titled 'Link Sections' and features a table with the following data:

Section Name	Link Count	Shared
Top Links	3	<input type="checkbox"/>
Finance Links	4	<input type="checkbox"/>
Staff Links	3	<input checked="" type="checkbox"/>

Below the table, there are pagination controls showing '50', '500', and '5,000' items per page, and a summary of '3 Sections'. The page footer includes the text 'Crafted by the Spark Development Network / License'.

Using the page pictured above you can add new sections, arrange the order of your sections or view the links within a section by clicking one of the rows.

Personal Links Section Detail

Section Detail

Home > My Settings > Personal Links > Top Links Link Section

Top Links Link Section

Name
Top Links

Edit

Personal Links for Top Links

Filter Options


Link Name	Link Uri
Campus Reports	https://rock.rocksolidchurchdemo.com/page/449
Common Data Views	https://rock.rocksolidchurchdemo.com/page/123
SMS Conversations	https://rock.rocksolidchurchdemo.com/page/321

50 500 5,000 3 Links

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From here you can manage all of your links within a section. You can rearrange their order, add new links or modify existing links. You can also [Edit](#) the section to change its name.

Shared Links

Administrators have access to similar pages for managing *Shared Links*. These are links which are shared with others in the organization and will appear in people's bookmark list. Shared sections will have a  icon next to them, to distinguish them from sections you've created for your own use.

Shared links can be managed by navigating to [Admin Tools > CMS Configuration > Shared Links](#). Shared sections and links work the same way as personal sections and links, with the same options available for managing them or adding new ones.

Shared Links

Home > CMS Configuration > Shared Links

Link Sections

Filter Options


Section Name	Link Count	Shared
Staff Links	3	✓

50 500 5,000 1 Section

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Using security, administrators can manage who can see each section. This allows you to personalize who can see the links based on roles within your organization. Keep in mind that this works at the section level, not for individual links.

Configuring a Person

As you've seen, there are a lot of ways you can describe an individual in Rock. However, there are still a few more configuration options available for you to extend. Below we'll walk through some of these additional settings on a person. Generally, these options are accessed by clicking the  icon in the *Person Profile* page.

Note

Each of these settings is a *Defined Type*. You can add new values for each of these items by editing their *Defined Values*. See the [Rock Admin Hero Guide](#) for more on working with [Defined Types](#).

Connection Status

The *Connection Status* helps categorize a person's relationship to your organization. While many organizations will want to modify these options, the following statuses are available immediately after installation.

Status	Typical Usage
Member	This individual has completed all requirements established by your organization to become a member.
Attendee	While not a member, this person is a consistently active participant in your organization's services and/or events.
Visitor	This status is used when a person first enters through your first-time visitor process. As they continue to attend, they will become an attendee and possibly a member.
Participant	A participant is indirectly involved with your organization. For example, if a family is part of a church's youth sports program but doesn't attend that church, they would be entered into Rock as participants.
Prospect	Prospect is the default status given to any record that's added from the website. Watch out for duplicate records with these!

It's up to your organization to determine the needed connection statuses. These statuses can be modified by an administrator under [Admin Tools > General Settings >](#)

Record Types

Record types help Rock add some capabilities to track certain types of entities within the database. There are five record types included after the install:

- **Person:** A person record
- **Business:** A business record
- **RestUser:** A Rest User (API)
- **Nameless Person:** An unknown person (see `Nameless People`)
- **Anonymous Visitor:** A visitor to your website who is not known. This is used with Rock's `Personalization` features.

For the most part, it won't make sense to add additional types unless you're adding new functionality by writing plugins.

Record Status

The record status gives you an idea of the state of the relationship between your organization and the individual. Each option included by Rock is discussed below:

- **Active:** Denotes an individual who is actively participating in the activities or services of the organization.
- **Inactive:** Represents a person who is no longer participating in the activities or services of the organization.
- **Pending:** Is used by the system to mark a record that needs to be verified before becoming active. This state is often used when someone registers online, to allow a staff person to confirm the new individual and check that it isn't a duplicate record.

You can add your own record statuses but realize that some of the features of Rock assume that the values provided have a certain meaning. Consider using connection statuses rather than record statuses if you need to track a person's status in a more detailed way.

Making a Person Inactive

In most cases, when you make a person inactive, they will automatically become inactive inside any groups; Unless the group isn't configured to remove people who are inactivated in the system.

Inactive Reasons

When someone is marked with the *Record Status* of "Inactive" it's a good idea to determine the reason. The system comes configured with the following reasons.

- No Longer Attending
- No Activity
- Moved
- Deceased

- Does not attend with family

It's simple to add more, so by all means feel free to add your own.

Marital Status

You also have the option of adding additional marital statuses to Rock. The defaults are:

- Single
- Married
- Unknown
- Divorced

Hopefully these cover it, but if not, then adding them is easy.

Phone Types

We've chosen to release Rock with a limited number of phone type options, allowing you to add others that make sense to you. The default values are:

- Home
- Mobile
- Work

Titles

The following titles are available in Rock: Mr., Mrs., Ms., Miss, Dr., Rev. and Cpt. Feel free to add more to your liking.

Suffixes

The following suffixes are available: Jr., Sr., Ph.D., II, III, IV, V and VI. Should you have a VII or VIII, you can add them yourself.

Person Attributes

Person attributes are a fundamental strength of Rock, so let's spend some time unpacking this feature.

When to Use Person Attributes

Person attributes should be used any time you want to store the characteristics of an individual. There are a couple of situations when a person attribute may not be the best fit though. Ask yourself these questions before you add a new attribute:

- Is there already a common person element or person attribute that exists? You'd be surprised how many duplicate attributes get created.
- Is the attribute related to a specific group? If so, consider making it a group member attribute instead.
- Is this attribute really needed? While there are many interesting things you could track about an individual, you should ask yourself if the data item is helpful to your mission. You don't want to get overwhelmed with the number of attributes you create.
- Will I be able to keep this attribute accurate going forward? If the value of the attribute changes over time you should ask yourself if you'll be able to keep it updated. Inaccurate data is often worse than no data at all. For instance, tracking a child's height might be interesting but impossible to keep accurate. Even if it's accurate, there's no way for a person to verify it.

Managing Person Attributes

Person attributes are managed from [Admin Tools > General Settings > Person Attributes](#).

Each element of the person attribute is discussed in detail below.

Name

The name of the person attribute. This will be used as the label when displaying the value.

Description

While many people might skip over the description thinking that the name is obvious, we encourage you to spend a moment to enter a thoughtful description of the person attribute. What's obvious to you now may not be clear to you, or others, in the future.

You might define what it means to your organization.

Sample: *Baptized Here* tells us that the individual was baptized at our organization and not by a previous church.

How the data is entered:

Example Description 1: This value is updated by the baptism coordinator after the baptism record card is received.

Example Description 2: This value is updated by the system once the individual is marked completed in a baptism workflow.

Categories

While person attributes should be created wisely and purposefully, over time it's likely your list will grow to be very long. To help with this, you can categorize attributes into groups. This allows you to manage groups of attributes instead of individual attributes.

It should be noted that a person attribute can be in more than one category. This allows it to be displayed in multiple areas yet have a single consistent value.

Key

For the most part, you don't have to worry about the attribute's key. A default value is created for you. The key is more for developers who might wish to override the default. (You know how developers can be.)

Required

Yep, you guessed it. You can require that certain attributes be completed whenever a person is edited.

Field Type

OK, this is where it gets fun. Rock allows you to store different types of data. You get to tell the system what type to use for your attribute. This determines what options exist for an attribute's value. For example, let's say you want your person attribute to track which foreign languages a person can speak. You wouldn't want to pick a field type of "Date" because a date wouldn't tell you anything about languages. Instead, a field type like "Defined Value" or "Multi-Select" would be better for tracking spoken languages.

Let's take a look at some field types and see how they can be used.

Field Type	Description
Boolean	That's just a fancy term for True/False. Use this for situations where the options are Yes or No, Done or Not Done. For instance, the <i>Baptized Here</i> attribute that comes with Rock is a Boolean. You were either baptized here or you weren't.
Campus	Don't use this to denote which campus someone attends. There's already a common element for that. Instead, this might be used to track which campus someone started attending or where they were baptized. Each of these could be different than their current campus selection.
Campuses	This allows you to pick several campuses as the value of the attribute. Perhaps you could use this to track every campus they have ever attended.
Date	You can probably guess what this does and how to use it.
Date Range	Tracks a start and end date.
Decimal	Stores a number with a fractional value.
Defined Value	Defined values are reusable lists of valid values. <i>Marital Status</i> , <i>Phone Type</i> and <i>Record Status</i> are all examples of defined value lists. You can use any of the pre-defined defined types or create your own. You can read more about defined types/values in the Rock Admin Hero Guide .
File	Allows you to upload a document into the person attribute. This is helpful for storing scanned copies of signed membership covenants or other documents you want to keep on hand. If you think you'll be uploading a lot of documents of a specific type, you might consider adding a new <i>File Type</i> . You can read more about this in the Rock Admin

Field Type	Description
	Hero Guide . When considering storing files in Rock keep in mind the storage implications of the files you'll be adding to the system.
HTML	Allows you to store a fragment of HTML that's specific to the person attribute. While this is uncommon, it's useful in some cases.
Integer	Stores a whole number (no fractions or decimals).
Memo	A larger text field for entering multiple lines of text.
Multi-Select	Allows you to specify a list of values that multiple items can be selected from. You define the list of values by passing in a comma-separated list of items (Red, Blue, Green). You can also choose to store a separate value than the label by using the notation <i>Value^Text</i> (1^Red, 2^Blue, 3^Green). The items will be displayed as a checkbox list.
Person	Allows you to tie the person attribute to a specific person. Be sure to consider using known relationships before adding a person attribute with a field type of <i>Person</i> as they are often a better solution.
Single Select	Are very similar to the multi-select field type but only allow a single value to be selected. The single select field type has the added option of displaying the list as either a radio list or dropdown select.
Text	A simple single line of text.
Time	Allows for the entry of time to a person attribute.

The field types above are the most common for person attributes, but others exist that we don't cover in this guide. The other types may be useful in certain edge cases, but the ones detailed above should be all you need for most scenarios.

Default Value

Most field types allow you to enter a default value that should be used when no specific value is provided.

Securing Person Attributes

The list of person attributes on the screen above also gives you the ability to secure person attributes so only a limited number of people can view and/or edit them.


Note

By default, *All Users* can view an attribute, but only *Administrators* can edit them.

Displaying Person Attributes

Person attributes can be viewed and edited from any tab on the *Person Profile* page. This is done by adding the *Attribute Values* block to a zone and setting it to display a specific category of person attributes. This is very flexible because a person attribute

can belong to more than one category.

To add a new block to a zone, use the *Admin Toolbar* at the bottom of the page. There you'll use the  to bring up the *Zone Editor* which will allow you to add a new block. For more information on the content management features of Rock be sure to see

[Designing and Building Websites Using Rock](#).

Tip

Don't limit yourself to adding *Attribute Value* blocks to only the *Extended Attributes* page. These blocks can be added under any of the tabs on the *Person Profile* page.

Public Person Attributes

While it's useful for your staff to see and edit person attributes from the *Person Profile* page, sometimes you may want to let people update their own attributes. For example, if you need to ask questions of people who are interested in serving, you can create person attributes for these questions and then use the *Person Attribute Forms* block on your external Rock site to prompt people for the answers to those questions. This block can be used to display any combination of person attributes and allows the person who's logged in to fill out their own values. See the Adding Content to Rock section in the [Designing and Building Websites Using Rock](#) book for more details on that process.

Basic Usage

Once you've added the *Person Attribute Forms* block to a page, you can configure the forms and fields for it to display. Think of forms as pages that a person will navigate between using [Next](#) and [Previous](#) buttons. The fields are the person attributes to display on each form. Open the block's edit page to create the forms and select the fields. You can give each form a title to be displayed, and optionally add any header or footer HTML content to each form.

Person Attribute Forms Settings

1 Display Progress Bar

If you are going to configure this block with multiple forms, you can optionally have a progress bar displayed at the top of each page that gives a visual indication to the individual on how far along they are in filling out the forms.

2 Save Values

This determines when the values for each field are saved. They can either be saved after each page (when the person clicks `Next`) or at the end of all the forms (when the person clicks `Finish`).

3 Workflow

You can configure the block to automatically launch a workflow after the individual has filled out all the forms. For example, you may want to launch a workflow that sends a notification to a staff member, and/or perhaps sends a thank you email to the person who filled out the form.

4 Done Page

In addition to sending a workflow, you can also pick another page on your website that people should be sent to after they have filled out all the forms. This could be a page that has an HTML block with a thank you message.

5 Forms

One form is added by default, but you can add additional forms by clicking the `Add Form` button at the bottom. To add Fields to a form, click the `+` button. This will display the *Form Field* dialog.

When adding a field to a form, there are several options for each field that can be set.

Field Settings

Form Field

Person Attribute **1**
Ability Level

Use Current Value **2**
 Yes

Required **3**
 Yes

Pre-HTML **4**

Post-HTML

Save Cancel

- 1 Person Attribute**

This one's obvious. Select the person attribute that you'd like to display on the form.
- 2 Use Current Value**

Check this box for the individual to be able to see what their current value is for this attribute. If you don't check this box, the person won't see the current value, and if they don't enter anything, it will get updated with a blank value.
- 3 Required**

Check this box for the individual to be required to fill out a value for this person attribute.
- 4 Pre-HTML/Post-HTML**


You can optionally enter any text or HTML to be displayed before or after the field. This is useful if you want to highlight certain fields or group them in a special way. This may take some HTML knowledge to pull off correctly, but it's not required.

Family Attributes

We've just looked at how to add person attributes to records, so now let's consider how you can add the same functionality to families.



As you consider your data needs, you'll want to evaluate whether the data attribute best describes an individual (person attribute) or the entire family (family attribute). Say, for instance, your organization is involved in the foster care movement. You might want to note which families are participating in this initiative. You might also want to note where they are in the process of getting approved. While you could put this information on the head of household, it would make more sense to instead make these fields family attributes. This will allow both the head of house and the spouse to be able to update them on the [Person Profile](#) page.

Viewing Family Attributes

Family attributes are displayed in the *Family Members* block of the *Person Profile* page. You'll note that attributes that are marked *Show in Grid* will always be displayed. Attributes not marked in this way will be displayed when the  icon is clicked in the upper right of the family bar.

Family Attributes

The screenshot displays the 'Family Attributes' section for a user named Ted Decker. The interface features a navigation sidebar on the left and a top header with user information. The main content area has tabs for 'Profile', 'Extended Attributes', 'Steps', 'Groups', 'Documents', 'Contributions', 'Benevolence', and 'More'. The 'Family Attributes' section is expanded, showing contact information (phone number, work email, social media links), a family group 'Decker Family' with members Cindy 41, Noah 14, and Alex 11, and a 'Foster Family' attribute set to 'Yes'. A home address is also listed. A red circle 1 highlights the 'Foster Family' attribute, a red circle 2 highlights the edit icon for the family group, and a red circle 3 highlights the 'Show in Grid' dropdown icon.

- 1 Attributes**
Attributes marked *Show in Grid* will always be displayed here.
- 2 Edit Family**
You can update the family attributes (as well as other family information) by selecting the  icon.
- 3 Additional Attributes**
The  icon will appear here only if there are family attributes with *Show in Grid* disabled. When present, the icon can be clicked to view those attributes.

Adding Family Attributes

Since families are simply a group type in Rock, you'll add family attributes in the *Group Type* editor under `Admin Tools > General Settings > Group Types`. Family attributes should be added as "Group Attributes" within the Group Type.

Categories Not Yet Supported


Attribute categories are not currently supported for family attributes. There are plans to add support for categories in a future release.

Person & Family Analytics

An important role for leaders is to care for and support the people who engage with their organization. As an organization grows this can become a difficult task as you may lose track of many of the details that make your larger organization feel small. Rock's person and family analytics tools help summarize all these details and provide predictive alerts when certain key behaviors change.

These tools provide a very clear picture of a family's involvement. As you'll see, this opens the door to some incredible opportunities for your organization. It can also, if not guarded, be somewhat creepy. Most tools in life can be used as a weapon (think of a hammer). We know we don't need to say this but be careful that these tools aren't used as a weapon. There... that's done... let's jump in!

Well, Almost Done...

You'll note that in several places we use the  icon to represent these analytic tools. Just another subtle reminder that these tools are a guardian for good.

eRA – Estimated Regular Attender

Wouldn't you love to know each and every one of your regular attenders? Get a reminder every time a new one showed up and another when someone left? Well, without divine intervention, that's just not possible today. With all the data in Rock, though, we can make a decent prediction of a regular attender. This is what we call eRA (no... not Earned Run Average... Estimated Regular Attender).

Recipe for an eRA

The key data points for calculating an eRA are giving and attendance. Neither is treated as more important, as each is a good reflection of activity. While researching the best algorithm, we tried to have a bias toward the speed of detection without having too many false positives. The result should determine a regular attender within four months of the first activity.

There are actually two recipes for determining an eRA. The first determines how one becomes (enters) an eRA, the other determines how one exits from being an eRA.

Criteria for Becoming an eRA

- Have given at least four times in 12 months, once being in the last six weeks
- (or) have attended at least eight times in the last 16 weeks

Keep in mind that every giving transaction counts toward eRA. So, if a person gave twice last Sunday and twice this Sunday, that counts as four transactions and the person will become an eRA.

Families and eRA

If a person meets either of the criteria above then the eRA status is applied to all Active family members, including children.

Criteria for Exiting an eRA:

- Haven't given in over eight weeks
- (and) have attended less than eight times in the last 16 weeks
- (and) haven't attended at all in the last four weeks

Inactive Records

Inactive family members will not receive an eRA status. However, making a person Inactive after they have been established as an eRA will not immediately remove their eRA status. The same "exiting" rules apply as described above.

You might be thinking, "Those are a great start, a little tweaking for our organization and we'll be set." Another goal of the eRA metric is to have a well-defined measure that churches can use to help benchmark. Because of this, we don't allow the recipe to be configured.

If you're not sure why standard benchmarks are needed, let's use an example. If you ask a church what their attendance is, the need for standard benchmarks becomes clear. Without asking at least four qualifying questions (is that just weekend services, does it include volunteers, etc.) you won't know what this number really represents. For that reason, and to establish that well-defined measure, when calculating eRA Rock looks at the attendance for groups whose attendance counts as 'Weekend Service'.

What's This About "Weekend Service"?

You may be wondering what counts as "Attendance" when it comes to Family Analytics. This is determined by the *Weekend Service* setting on any Group Type used for check-in. Out of the box, Rock ships with the Kids/Youth and Serving Team Group Types configured with the *Weekend Service* option enabled.

If you have another Group Type you wish to count as "attendance at a Weekend Service" (and thus, count towards Family Analytics) go to [Admin Tools > General Settings > Group Types](#) and edit the desired Group Type to enable [Weekend Service](#) under the Attendance/Check-in tab.

Viewing the Analytics

Person Profile Page

Most of the information will be viewed on the person's *Profile Page*, specifically the *Extended Attributes* tab. Let's take a look.

Analytics Attributes

Family Analytics

Currently an eRA	Yes
eRA Start Date	1/1/2013
eRA End Date	6/28/2018
First Checked-In	1/1/2013
Last Checked-In	6/28/2018
First Gave	1/1/2013
Last Gave	6/28/2018
Times Checked-In (16 wks)	16
Times Given (52 wks)	52
Times Given (6 wks)	6

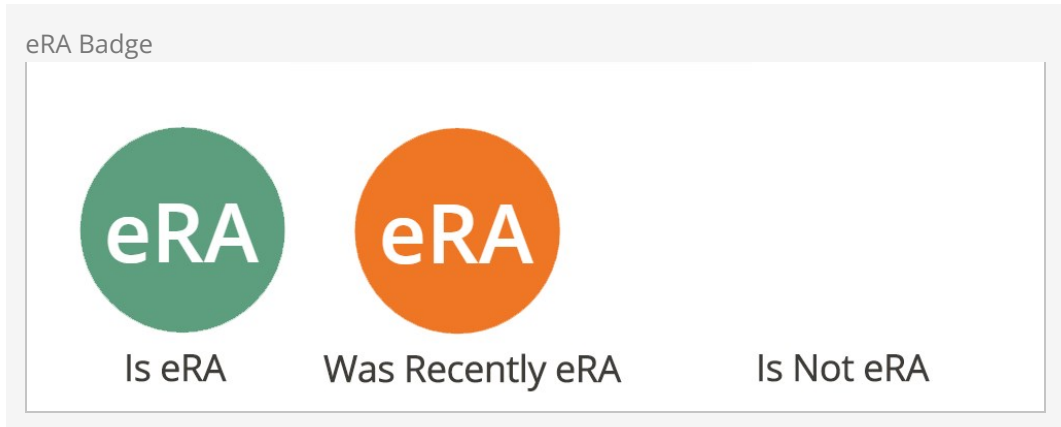
Security

By default, all these values are viewable by the RSR - Staff Workers and RSR - Staff Like Workers. You can adjust the security of each of these attributes under [Admin](#)

[Tools](#) > [General Settings](#) > [Person Attributes](#).

eRA Badge

The state of the person's eRA can also be seen on the badge bar. The eRA badge has three states.



- **Is eRA:** The person currently is an eRA
- **Was Recently eRA:** Was an eRA but exited the eRA criteria in the last 30 days.
- **Is Not eRA:** Does not meet the eRA criteria. This badge is simply blank.

eRA History

It's possible that a family can start and stop being an eRA multiple times. To help you see this type of activity we log each time a person enters and exits the eRA status on their history ([Person Profile](#) > [History Tab](#)).

eRA Workflows

Would it concern you if someone who has had regular activity in the past suddenly becomes irregular? Of course it would! You'd probably want to be notified or send them a communication, right? Well, we've thought of that for you. The *Family Analytics* job can be configured to launch a new workflow (you'll still need to create the workflow) anytime a family enters or exits from being an eRA. To help simplify your workflow, the job will pass in the following information:

Attribute Key	Attribute Type	Description
Family	Group	This is a reference to the family group who has entered or exited.
HeadOfHouse	Person	The head of the household of the family.
Spouse	Person	The spouse of the family (could be empty).
Campus	Campus	The home campus of the family.

A couple of things to think about as you configure your workflow:

- If the family doesn't have any adults configured, no workflow will be launched.
- Remember the "e" in eRA stands for *Estimated*. It's not perfect. If you have a communication as a part of your workflow, be sure not to make any assumptions. It's possible that they are still attending but are not giving or having kids check in. Try to make the tone of your communications more of a "Just checking in..." instead of "We miss you..."

See our [Blasting Off With Workflows](#) guide for more information on workflows.

Calculating the Analytics

All these measures rely on the *Family Analytics* job to be enabled and scheduled to run regularly. This job is available for you out of the box but isn't automatically enabled. To enable it, simply go to [Admin Tools > System Settings > Jobs Administration](#). From there you can select the *Family Analytics* job and activate it. You'll also want to consider when and how often it's set to run.

The job can also be configured to launch workflows when a family enters or exits the eRA status. See the [eRA Workflows](#) section for more information on these settings.

Let's look at all the settings of this job in detail.

The screenshot shows the 'Scheduled Job Detail' configuration page for a job named 'Family Analytics'. The page includes a sidebar with navigation icons and a main content area with the following fields:

- Name:** Family Analytics
- Active:**
- Description:** Job that populates Rock's family analytics
- Notification Status:** All
- Cron Expression:** 0 0 20 ? * TUE *
- Notification Emails:** (empty field)
- Cron Description:** At 08:00 PM, only on Tuesday
- Job Type:** Calculate Family Analytics
- Job History Count:** 500
- eRA Entry Workflow:** (dropdown menu)
- eRA Exit Workflow:** (dropdown menu)
- Set Visit Dates:** Yes
- General:**
 - Command Timeout:** 3600

At the bottom of the form are 'Save' and 'Cancel' buttons. A footer note states: 'Crafted by the Spark Development Network / License'.

1 eRA Entry/Exit Workflows

Use these fields to select which workflow should launch when someone enters and/or exits eRA.

2 Set Visit Dates

When enabled this will enter the first and second visit person attributes. See below for details.

The logic for setting visit dates is fairly complex as it doesn't only look at attendance. The job also considers when the person's record was created. This prevents the system from adding a date to a record that has been around for a while. This could happen when adults who have attended for some time check in a new child for the first time. So, the first visit date is only calculated if it's within 14 days of the person's record being created.

Additionally, remember that a child's visit dates will only be calculated using *Weekend Service* check-in records. An adult's dates will be calculated based on the check-in records of all children in the family.

Managing Known Relationships

Known relationships are a great way to pattern real-world relationships in your database. While Rock comes with several relationship types already configured (Grandparent, Invited By, etc.), you can create new relationships as needed.

Creating A New Relationship Type

Known relationships actually use groups to store their values. Each person in the database has a hidden group that contains all of the individuals with whom the person has a relationship. When you configure known relationships, you're really configuring the *Known Relationship* group type.

To add a new relationship type, follow these steps:

1. Navigate to the *Group Types* editor `Admin Tools > General Settings > Group Types` and select the *Known Relationship* group type.
2. Open the *Roles* section and add the new relationship role.
3. Save the group type
4. **Optional:** If your relationship has an inverse relationship (grandparent <-> grandchild), you can automate the creation of the inverse relationship by editing the role you created and selecting the inverse relationship. In order to pick the inverse, you must first create the relationship roles and save the group type. Then you can go back and edit the inverse types.

When adding a new relationship, you can decide if this type of relationship should allow an individual to check-in the other. For instance, you may decide that grandparents should be allowed to check in their grandchildren.

School Grades

Rock provides a customizable system for determining the grade or year of an individual's education and automating promotion from one grade to the next. For most organizations in the US, the out-of-the-box configuration should meet all their needs. For international organizations or those in locales where customization is required, it's easy to adjust the system.

When adjusting the grades, the first thing to keep in mind is that Rock only stores the year that someone graduates from the educational system. In the US, that's their high school graduation. Rock dynamically calculates a person's grade by:



1. Comparing the current date to their graduation year which provides an offset in years. Rock also uses the *Grade Transition Date* Global Attribute to help determine the start of the school year.
2. The year offset from step 1 is then compared with the grades in the *School Grades* defined type. The first Defined Value (grade) whose value is greater than or equal to the offset is selected. For systems that have one grade for each year, this is a simple setup. The last grade (senior year in the US) would have a value of 0, the next (junior) a value of 1, etc. For systems where a grade spans multiple years, you would "skip" years. For example, to have a *Middle School* grade level instead of separate 7th and 8th grades, you would set the *Value* of *Middle School* to 5, and the next higher grade level (Freshman) to 3.

When adding a new person to the system you're asked to provide their grade. The person's graduation year is initially determined by the grade provided, using the reverse of the above logic.

Knowing that not every system uses the term *Grade*, Rock allows you to configure the term that's used by editing the *Grade Label* global attribute under [Admin Tools > General Settings > Global Attributes](#). So, if you're more familiar with "year" or "level" it's easy to adjust accordingly.

Bulk Updates

Sometimes you have to update a little bit of data. Sometimes you need to update a lot. When you find yourself in the latter situation, you'll want to use Rock's bulk update capabilities. Bulk update is used to make changes to large populations all at once, instead of making the same change repeatedly one person at a time.

You may have noticed the  icon at the top and bottom of table grids that list people. Selecting people on the grid and pressing the  icon will take you to the *Bulk Update* page.

Select Individuals for Bulk Updates

The screenshot shows the 'Person Search' interface. At the top, there is a navigation bar with a home icon, a search bar, and a user profile. Below the navigation bar, the page title is 'Person Search' with a breadcrumb 'Home > Person Search'. The main content area displays a table of search results. The table has columns for 'Person', 'Age', 'Connection Status', 'Record Status', and 'Campus'. There are five rows of data, each with a selection checkbox on the left. The first row is highlighted, and a blue circle with the number '1' is next to its checkbox. The second row has a blue circle with the number '2' next to its checkbox. At the bottom of the table, there is a pagination control showing '50', '500', and '5,000' options, and a text '4 Person Search Results'. A blue circle with the number '3' is next to the pagination control. The footer of the page says 'Crafted by Spark Development Network / License'.

Person	Age	Connection Status	Record Status	Campus
<input checked="" type="checkbox"/> Decker, Alex 11624 N 31st Dr Phoenix, AZ 85029-3202	11	Attendee	Active	Main Campus
<input checked="" type="checkbox"/> Decker, Cindy cindy@fakeinbox.com 11624 N 31st Dr Phoenix, AZ 85029-3202	41	Member	Active	Main Campus
<input type="checkbox"/> Decker, Noah 11624 N 31st Dr Phoenix, AZ 85029-3202	14	Attendee	Active	Main Campus
<input type="checkbox"/> Decker, Ted ted@rocksolidchurchdemo.com 11624 N 31st Dr Phoenix, AZ 85029-3202	42	Member	Active	Main Campus

- 1 Select All**
Selects all items visible on the grid. It does not select items on previous or next pages.
- 2 Individual Select**
You can also select specific individuals on the grid. Or you can use the *Select All* and then individually unselect items.
- 3 Bulk Update**
Takes you to the *Bulk Update* page with the individuals you selected.

Power Tip

If you would like to select all the individuals, even those on previous/next pages, you can leave selection blank (don't select anyone) and press the bulk update button. This adds everyone in the grid to the *Bulk Update* page.

Once on the *Bulk Update* page, you can select various data points to update. You must first select the data item you wish to update by clicking the icon next to the item.

Performing Bulk Update

The screenshot shows the 'Bulk Update' interface. At the top, there is a navigation bar with a home icon, a search bar, and a user profile. Below the navigation bar, the page title is 'Bulk Update' with a breadcrumb 'Home > Bulk Update'.

Update Individuals

Selected Individuals: 4 People Add Person

Ted Decker ✕
 Cindy Decker ✕ **1**
 Noah Decker ✕
 Alex Decker ✕ Remove All Individuals

Individual Details

2

Title Suffix
 Connection Status Record Status
 Gender: Male Marital Status
 Grade Graduation Year
 Campus
 Communication Preference: Email
 Email Status: Active Email Preference: Email Allowed
 Email Note
 Follow: Add to Following Review Reason
 System Note Review Reason Note

Childhood Information Education
 Employment Membership
 Visit Information

Add note

3

Note Type: Personal Note

Note

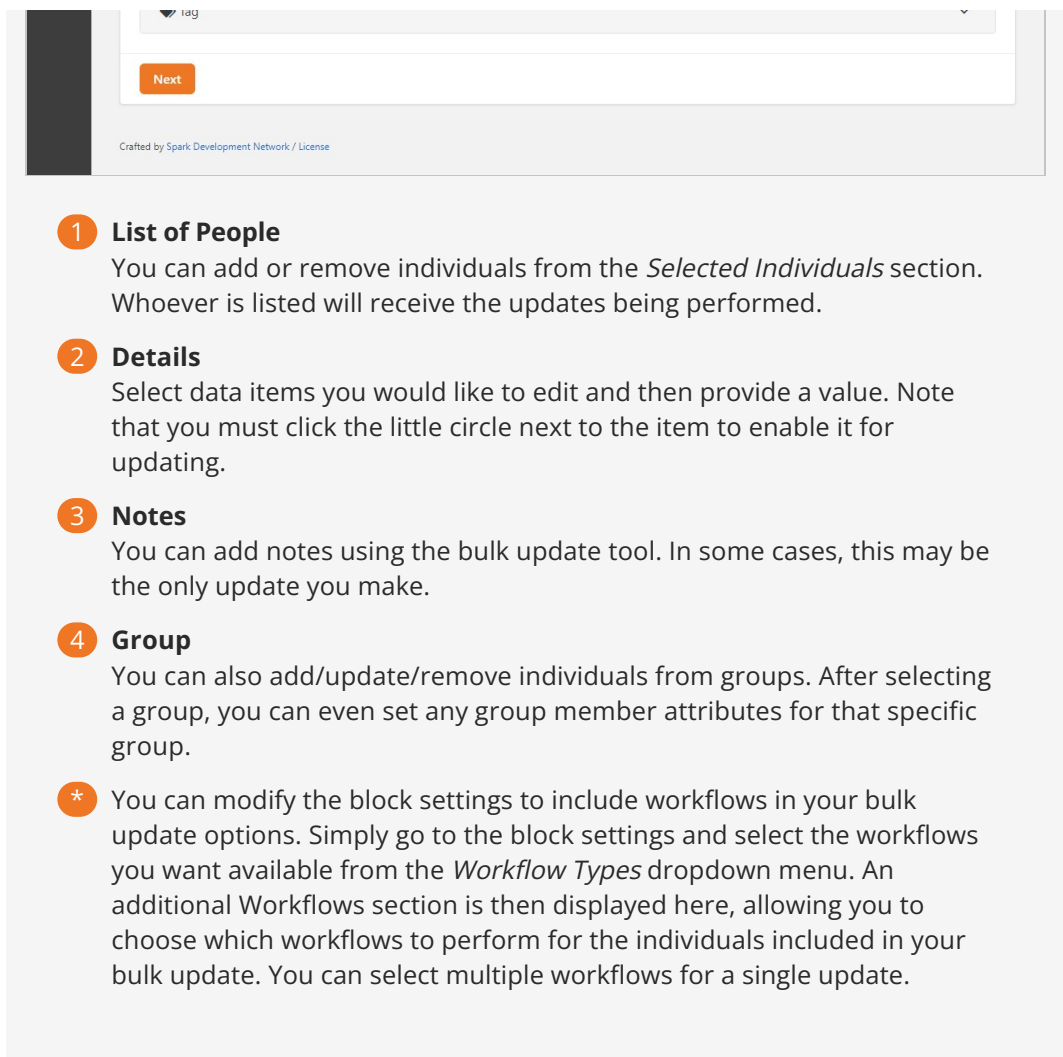
Alert
 Private

Group

4

Action: Add To Group

Group



The screenshot shows a software interface with a dark sidebar on the left. At the top, there is a search bar with a dropdown arrow and the text 'tag'. Below the search bar is a white box containing an orange 'Next' button. Underneath the white box, the text 'Crafted by Spark Development Network / License' is visible. The main content area is light gray and contains a list of five numbered instructions for bulk updates, each preceded by an orange circle with a white number or asterisk.

- 1 List of People**




You can add or remove individuals from the *Selected Individuals* section. Whoever is listed will receive the updates being performed.
- 2 Details**






Select data items you would like to edit and then provide a value. Note that you must click the little circle next to the item to enable it for updating.
- 3 Notes**

You can add notes using the bulk update tool. In some cases, this may be the only update you make.
- 4 Group**

You can also add/update/remove individuals from groups. After selecting a group, you can even set any group member attributes for that specific group.
- * You can modify the block settings to include workflows in your bulk update options.** Simply go to the block settings and select the workflows you want available from the *Workflow Types* dropdown menu. An additional Workflows section is then displayed here, allowing you to choose which workflows to perform for the individuals included in your bulk update. You can select multiple workflows for a single update.

Once you've made your updates, click the `Next` button and you'll be shown a summary of your changes. If everything looks good, click `Confirm` and your changes will be applied.

Name ▾



Bulk Update

[Home](#) > [Bulk Update](#)

Update Individuals

You are about to make the following updates to 4 individuals:

- Update `Connection Status` to value of `Member`.
- Add to `ushers` group.

Please confirm that you want to make these updates.

[Back](#) [Confirm](#)

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Person Profile Editor

The *Person Profile Editor* is an external page that's dedicated to allowing individuals to update their own information. You can find this page on the external website by selecting `My Account` from the *Login Status* block. You'll notice that individuals are able to edit their details at the top of the page. They can also update each of the individuals in their family.

Person Profile Editor

My Account

[Home](#) / [My Account](#)

Ted Decker

39 years old (2/10/1982)
Male
Married 20 yrs (1/4)

Contact Information

Home Address

11624 N 31st Dr
Phoenix, AZ 85029-3202

Email

ted@rocksolidchurchdemo.com

1

[Update Profile](#)

Decker Family



Cindy Decker

39 yrs old (3/10/1982)
Female
Married 20 yrs (1/4)

Contact Info

cindy@fakeinbox.com

2



Noah Decker

13 yrs old (3/10/2008)
6th Grade
Male



Alex Decker

10 yrs old (2/10/2011)
3rd Grade
Female



3

[Add New Family Member](#)[Request Additional Changes](#)

4

Account Info

[Change Password](#)

Groups

[A/V Team \(Member\)](#)[Decker Group \(Leader *\)](#)[Mostest Funest Group \(Member\)](#)[Schedule Toolbox](#)

Assessments

DISC

Available

[Start Assessment](#)

Spiritual Gifts

Available

[Start Assessment](#)

Conflict Profile

Available

[Start Assessment](#)

Emotional Intelligence

Available

[Start Assessment](#)

Motivators

Available

[Start Assessment](#)Powered by: [Rock RMS](#)

3120 W Cholla St Phoenix, AZ 85029

1 Update Profile

In this example, Ted can click here to edit his own information. This is the easiest way to do things like address changes.

2 Edit Family Member

Ted can also edit the information for each member of the Decker family by clicking the icon shown here.

3 Add New Family Member

Your guests can add new members to their families by clicking this button.

4 Request Additional Changes

There may be some information that you want to maintain internally only. This button will launch a "Profile Change Request" workflow that lets your guests request changes to their profile that they can't make on their own.

There are several block settings that you should be aware of for this block. Some of them include:

- **Show Family Members:** This determines whether the block should allow viewing and editing of the family members.
- **Address Type:** The type of address that should be displayed for viewing and editing.
- **Phone Types:** The type of phone numbers to show for viewing and editing.
- **Workflow Launch Page:** This block can be configured to show a button labeled `Request Additional Changes`. When this button is clicked, it will navigate to the page provided to launch the workflow.
- **Family Attributes:** The family attributes you would like to configure for viewing and editing.
- **Person Attributes (Adults):** The person attributes you would like to configure for viewing and editing for adults in the family.
- **Person Attributes (Children):** The person attributes you would like to configure for viewing and editing for children in the family.
- **Require Gender:** If this is set to 'No' then the *Gender* field will still be required, but an additional option of 'Unknown' will be made available.
- **View Template:** The power of Lava is at your disposal. With this block setting you can use a Lava template to control the view mode of the page.

These are only some of the options. Again, we strongly encourage you to review all the settings for this block to ensure it's meeting your needs.

Photo Requests

Rock is about fostering relationships. Nothing helps this more than having photos in the system. In the past, keeping up with photos was a complex and time draining task. No longer! Rock makes it easy to populate photos into the database by asking individuals to upload a photo from an emailed request. Let's take a look at how it works.

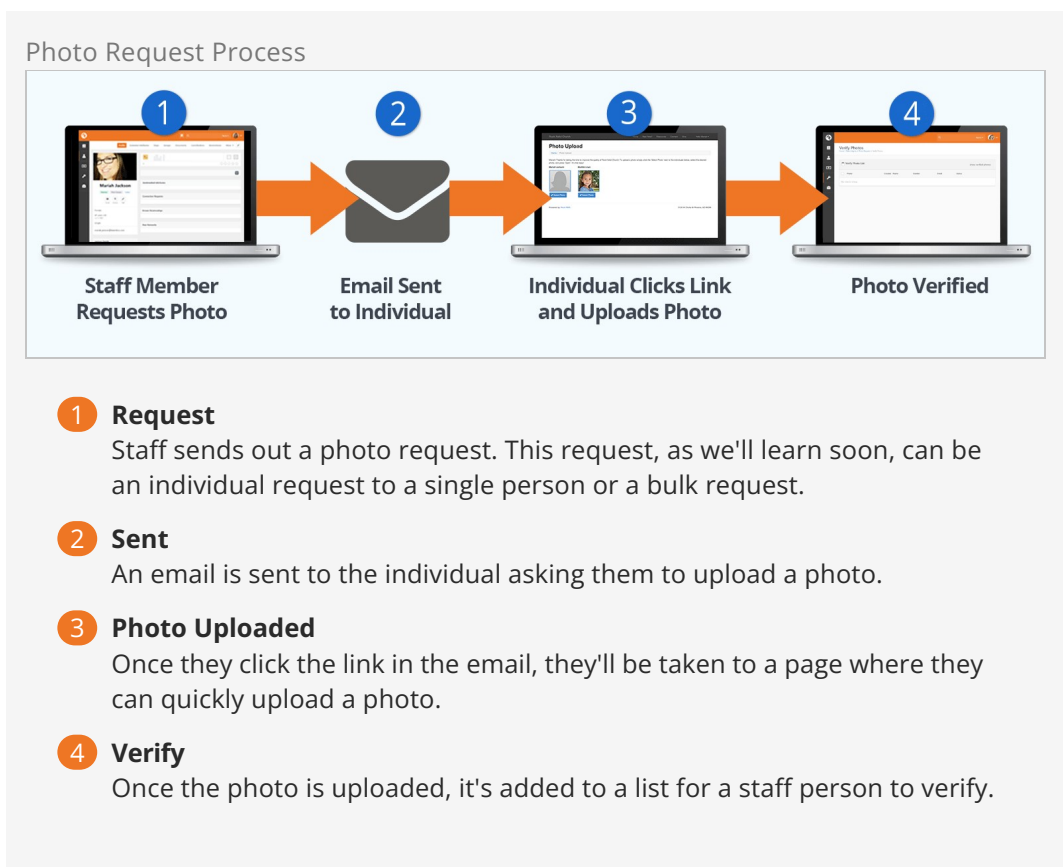
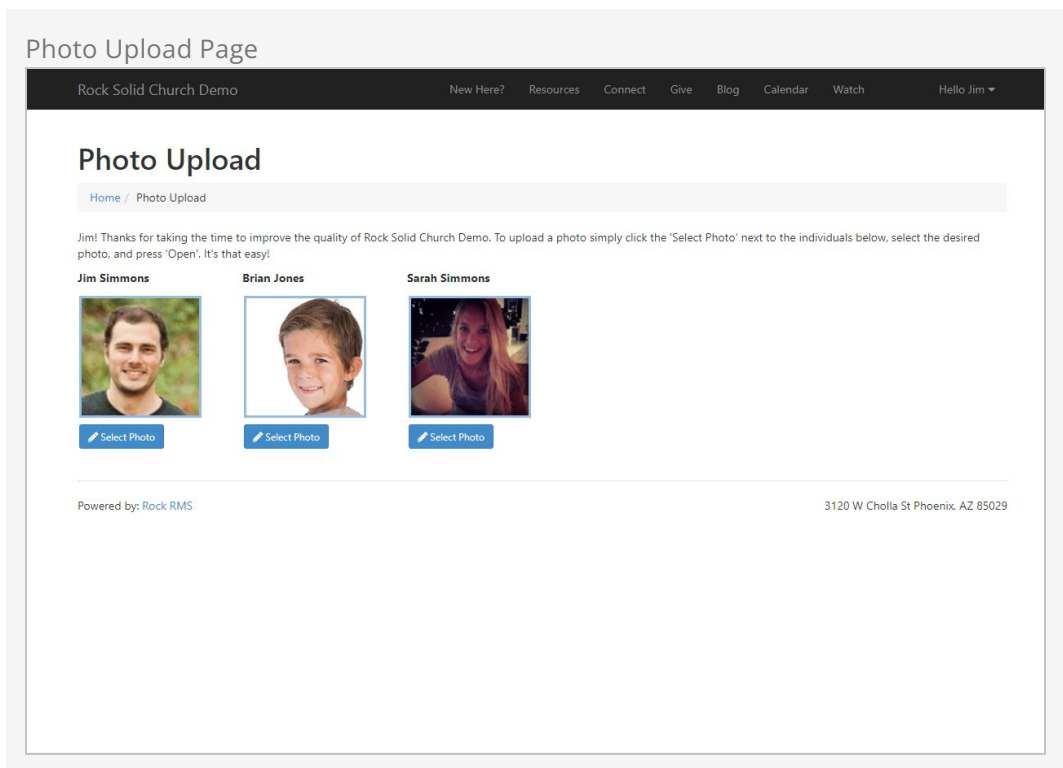


Photo Upload

When the individual clicks the upload link in their email, they'll be taken to the page pictured below. This page is under [External Homepage > Support Pages > Photo Upload](#) but it isn't linked into the website, so you'll have to get there from [Admin Tools > CMS Configuration > Pages](#).



The link they use to get to this page has an embedded security token that allows them to upload their photo without having to log in.

The block on this page has a couple of settings you can use to alter its behavior. These settings include:

- **Include Family Members:** This setting will allow the individual to upload photos for their whole family from their link. The default value for this setting is true.
- **Allow Staff:** This setting allows staff members to change their own photos. Some organizations may not want staff to update their photos as they have standard staff photos they'd like to keep consistent. The default value for this setting is false.

Bulk Requests

The easiest way to get a large number of photos into the system is to use the bulk photo request option. You can make these requests under [Admin Tools > Communications > Send Photo Requests](#).

This screen allows you to send an email to a selected list of people asking them to provide a photo for the system.

1 Family Roles

Indicate if requests should go out for adults, children or everyone.

2 Age is more than

If you allow requests to be sent to children, you can provide a minimum age.

3 Connection Status

Select the *Connection Statuses* you'd like to use as a filter. If none are selected, then the request will go to individuals with any status.

4 Exclude

It's not helpful to request a photo from someone who already has one in the system. This feature allows you to exclude those who have a photo newer than a set number of years.

5 Test

It's often a good idea to send yourself a test email to see what the recipients will be sent.

6 Send

When you're ready, click `Send`.


After clicking `Send`, the individuals will receive an emailed request to upload their photos. The contents of this email can be modified under:

`Admin Tools > Communications > Communication Templates > Photo Request Template`.

Tip to Limit Abuse

To help minimize the potential abuse of this feature by staff, there's a block setting that limits the number of photo requests that can be sent without approval. The default is 300. Feel free to change this number to suit your needs. The block uses the same approval process as bulk email.

But There's More

Using the bulk photo request screen above is a great way to send out mass requests for photos. You can also send this same email to a list of people using the *Photo Request* communications template. Let's say you have a report that lists people for an upcoming event, and you'd like to get their photos before the event. By clicking the  button in the grid's footer you'll be taken to the *New Communications* page. Click the *Use Simple Editor* button near the top right of the block, then select the *Photo Request Template* from the Template dropdown and you're off to the races!

See our [Communicating With Rock](#) guide for more information.

Individual Requests

Bulk requests can help you populate your database with a large number of photos, but sometimes a personal request is needed. From an individual's *Person Profile* page, you can quickly request a photo under:

[Actions > Photo Request](#).

This will launch a short workflow entry screen that allows you to type in a personal message to the recipient. Rock will add some instructions and links to your email to enable the upload process.

Verifying Photos

While it's highly unlikely, it's possible that someone could upload an inappropriate image. To help filter these out, Rock has a photo verification process. When a person uploads a photo, it's immediately available for viewing. At the same time, it's also added to a list to be manually verified. This list can be found under:

[Tools > Data Integrity > Photo Requests > Verify Photos](#).

Verify Photos

The screenshot shows the 'Verify Photos' interface. At the top, there is a navigation bar with a home icon, a search icon, and a user profile icon. Below the navigation bar, the page title 'Verify Photos' is displayed, followed by a breadcrumb trail: 'Home > Data Integrity > Photo Requests > Verify Photos'. The main content area is titled 'Verify Photo List' and includes a checkbox labeled 'Show verified photos' (marked with a blue '1'). Below this is a table with columns: 'Photo' (marked with a blue '2'), 'Created', 'Name', 'Gender', 'Email', and 'Status' (marked with a blue '4'). The table contains two rows: one for Cindy Decker (Female, Pending) and one for Brian Jones (Male, Verified). Below the table, there are pagination controls showing '50', '500', and '5,000' items per page, with '2 photos' displayed. A 'Verify' button (marked with a blue '5') is located at the bottom of the table area. A sidebar on the left contains icons for home, user, search, tools, and a briefcase.

- 1 Show Verified Photos**
By default, this screen only shows photos that need to be verified. Checking this box will show all photos, even those that have already been verified.
- 2 Select All**
Checking this box will select all the records visible on the list.
- 3 Photo Records**
Photos that have been submitted are listed here, along with details of the person.
- 4 Status**
You can check the current status of the photo.
- 5 Verify**
After selecting photos to verify, you must click `Verify`.

Photo Opt-Out

When an individual asks to be opted out of receiving future requests for photos, they are sent to the opt-out page which is located under:

`External Homepage > Support Pages > Photo Opt-Out`

They are also added to an application group called *Photo Request* with a member status of *Inactive*. You can view and manage this list under:

`Tools > Data Integrity > Photo Requests > Photo Request Application Group`

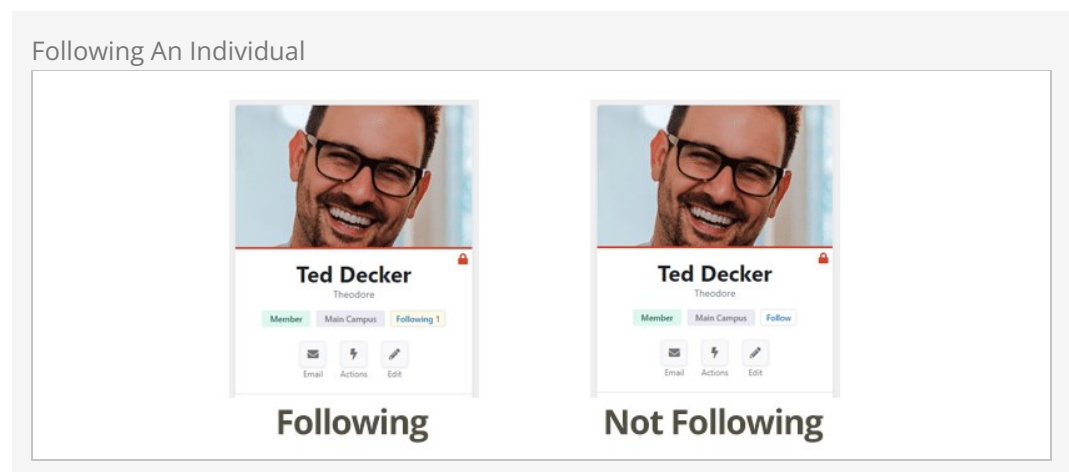
To remove someone from the opt-out list, simply remove them from this group.

Following

For most organizations, the database of individuals in Rock will far exceed the number of people a specific staff person will know. Without tools to help filter relationships, personalizing touch points would be impossible. Rock's *Following* features help filter these relationships so that an individual can be made aware when life events occur with people they know.

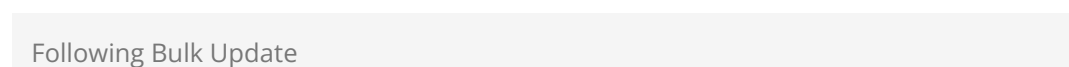
Following an Individual

The first step is to identify people you know. You can do this by clicking the *Follow* button below an individual's photo on their *Person Profile* page.



Bulk Following

Don't forget our friend, the bulk update tool. Bulk updates also allow you to add or remove a list of individuals from your following list.





Name ▾



Bulk Update

Home > Bulk Update

Update Individuals

Selected Individuals: 4 People

Add Person ▾

Ted Decker ✕
Cindy Decker ✕
Noah Decker ✕
Alex Decker ✕

Remove All Individuals

Individual Details

<input type="radio"/> Title	<input type="radio"/> Suffix
<input type="text"/>	<input type="text"/>
<input type="radio"/> Connection Status	<input type="radio"/> Record Status
<input type="text"/>	<input type="text"/>
<input type="radio"/> Gender	
<input type="text" value="Male"/>	
<input type="radio"/> Marital Status	
<input type="text"/>	
<input type="radio"/> Grade	<input type="radio"/> Graduation Year [!]
<input type="text"/>	<input type="text" value=""/>
<input type="radio"/> Campus	
<input type="text"/>	
<input type="radio"/> Communication Preference	
<input type="text" value="Email"/>	
<input type="radio"/> Email Status	<input type="radio"/> Email Preference
<input type="text" value="Active"/>	<input type="text" value="Email Allowed"/>
<input type="radio"/> Email Note	
<input type="text"/>	
<input checked="" type="radio"/> Follow	<input type="radio"/> Review Reason
<input type="text" value="Add to Following"/>	<input type="text"/>
<input type="radio"/> System Note	<input type="radio"/> Review Reason Note
<input type="text"/>	<input type="text"/>

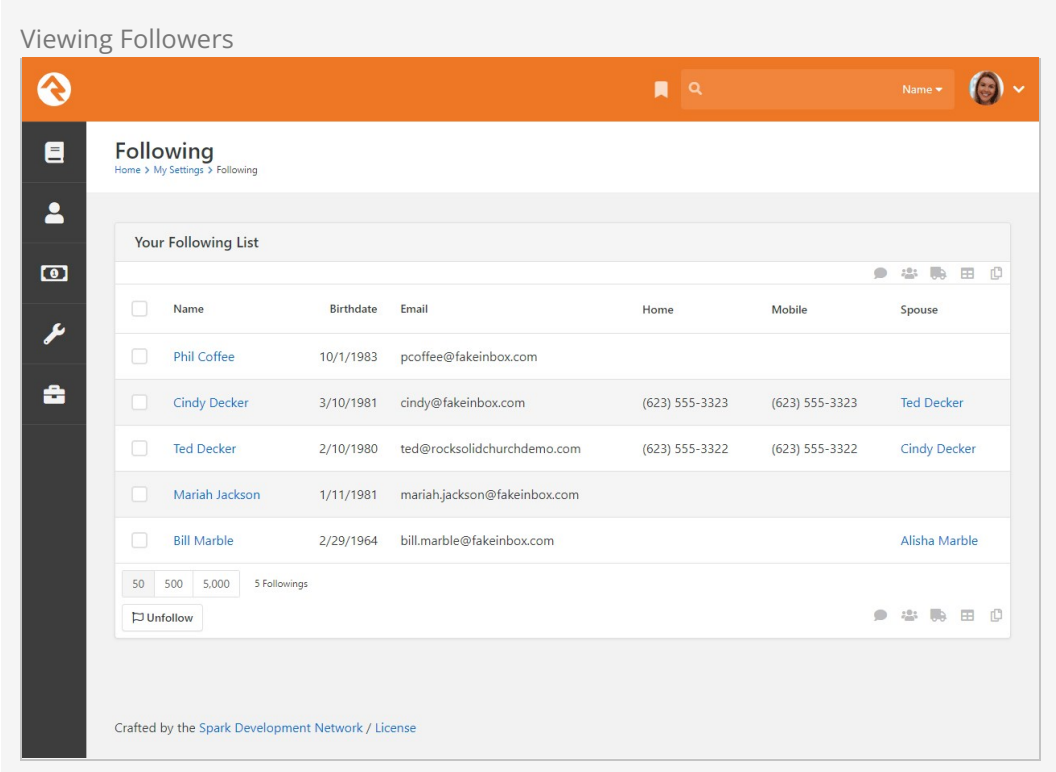
- Childhood Information ▾
- Education ▾
- Employment ▾
- Membership ▾
- Visit Information ▾
- Add note ▾
- Group ▾
- Tag ▾

Next

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Viewing Those You Follow

You can view a complete list of the people you follow under [Login Status > My Settings > Following](#) (the login status can be found in the top-right corner of the page). From this list you can manage the people you follow and remove any that may have been accidentally added.



The screenshot shows a web interface titled "Viewing Followers". At the top, there is an orange navigation bar with a home icon, a search icon, and a user profile dropdown. Below this is a dark sidebar with icons for home, profile, search, settings, and a briefcase. The main content area is titled "Following" and shows a "Your Following List" table. The table has columns for Name, Birthdate, Email, Home, Mobile, and Spouse. There are five rows of data, each with a checkbox on the left and an "Unfollow" button at the bottom. The bottom of the interface shows pagination controls for 50, 500, and 5,000 items, and a total of 5 followings. A footer note says "Crafted by the Spark Development Network / License".

<input type="checkbox"/>	Name	Birthdate	Email	Home	Mobile	Spouse
<input type="checkbox"/>	Phil Coffee	10/1/1983	pcoffee@fakeinbox.com			
<input type="checkbox"/>	Cindy Decker	3/10/1981	cindy@fakeinbox.com	(623) 555-3323	(623) 555-3323	Ted Decker
<input type="checkbox"/>	Ted Decker	2/10/1980	ted@rocksolidchurchdemo.com	(623) 555-3322	(623) 555-3322	Cindy Decker
<input type="checkbox"/>	Mariah Jackson	1/11/1981	mariahjackson@fakeinbox.com			
<input type="checkbox"/>	Bill Marble	2/29/1964	bill.marble@fakeinbox.com			Alisha Marble

Just the Beginning




Rock's *Following* feature is just a start. Look for lots of new capabilities in upcoming releases. We're providing the basics for now to help you start building your following lists.

Engaging Following






OK, now that you're following people, let's use this data to build better connections. Following a person means you have a special interest in that person; that you care about what's going on in their lives. So, wouldn't it make sense that you'd want to know when it's their birthday or wedding anniversary, when they're joining a group or better yet that they were recently baptized? Rock makes this a snap!

You can configure what types of notification events you're interested in under [My Settings > Following Settings](#) (found under the login status in the upper-right corner). Here you can see a list of all the events you can be notified of.

Following Event Settings



Name ▾



Following Settings

[Home](#) > [My Settings](#) > [Following Settings](#)

Following Events

Person Events


- Baptisms
Person was recently baptized
- Began Serving
Person recently began serving
- Birthdays required
Person with a birthday today (or this weekend)
- Joined Small Group
Person joined a small group
- Pastoral Note Added
Sends following alerts to people who are following someone who had a note added to them.
- Prayer Requests
Person submitted a public prayer request
- Upcoming Anniversaries
Person with an upcoming anniversary
- Upcoming Birthdays
Person with an upcoming birthday

[Save](#)

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Every day, Rock will determine if anyone on your following list has the configured notification events and will send you a personalized email of the results.


Following Event Email




Ted,

Listed below are events that you have requested to be notified about.

Upcoming Birthdays




Bill Marble has a birthday on **Sunday, September 6 (In 5 Days)**
Email: bill.marble@rocksoliddemochurch.com
Cell: (623) 555-8297
Home: (623) 555-9673



Pete Foster has a birthday on **Sunday, September 6 (In 5 Days)**
Email: pete@rocksolidchurchdemo.com
Cell: (623) 555-6318
Home: (623) 555-9900

Birthdays



Jenny Michaels has a birthday on **Tuesday, September 1 (Today)**
Email: jenny@rocksolidchurchdemo.com
Cell: (602) 555-1804



Home: (623) 555-0135



Brian Jones has a birthday on Tuesday, September 1 (Today)

Email: ben@rocksolidchurchdemo.com

Cell: (602) 555-5588

Home: (602) 555-5588

Upcoming Anniversaries



Alisha Marble has a 20 year anniversary on Tuesday, September 1 (Today)

Email: alisha@rocksolidchurchdemo.com

Cell: (602) 555-1804

Home: (623) 555-0135

Baptisms



Sarah Simmons was baptized on Monday, August 31 (Yesterday)

Email: sarah@rocksolidchurchdemo.com

Cell: (602) 555-1804

Home: (623) 555-0135

Began Serving



Pam Foster recently began serving.

Email: pam@rocksolidchurchdemo.com

Cell: (602) 555-1804

Home: (623) 555-0135

Rock Solid Church

rocksolidchurchdemo.com

(623) 555-2444

info@rocksolidchurchdemo.com

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[Friend us on Facebook](#)

Rock Administrators can even set up new types of events that will be displayed here. But more on that in a minute.

Configuring Following Events

Rock ships with several following events, but it's easy to set up additional ones yourself. You can manage these events under `Admin Tools > System Settings > Following Events`.

Following Event Type List

Home > System Settings > Following Events

Name	Type	Active
Baptisms	Person Baptized	✓
Prayer Requests	Person Prayer Request	✓
Pastoral Note Added	Person Note Added	✓
Began Serving	Person First Joined Group Type	✓
Birthdays	Person Birthday	✓
Joined Small Group	Person First Joined Group Type	✓
Upcoming Anniversaries	Person Anniversary	✓
Upcoming Birthdays	Person Birthday	✓

50 500 5,000 8 Events

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As pictured in the screenshot above, you can apply security to Following Events by clicking the icon. The Following Settings block (see prior section above) will only allow subscribing to following events if the person has been granted 'View' access to that following event. If someone was subscribed to a following event that they no longer have access to view, when the following event notification is sent that event won't be included.

Person Note Added and Joined Group Type Security

Because the security of Notes and groups can't be checked when following events are being determined, each sensitive Following Event should be secured to match its related security configuration. For instance, if you have restrictions on who can view Pastoral Notes, then those same restrictions should be applied to the corresponding Following Event.

To add a new event, click the  from the top or bottom of the grid.

Following Event Configuration

Following Event
Home > System Settings > Following Events > Following Event

Add Following Event Type

1 Name Active 2

3 Description

4 Event Type

5 Notice Required Yes

6 Send Weekend Notices on Friday Yes

7 Notification Format

Save Cancel

Crafted by the Spark Development Network / License

1 Name

Provide the name of the event. This will also be used for the title on the email so it's best to use a plural form of the word like *Birthdays*.

2 Active

Indicate whether the event is currently active.

3 Description

Provide a brief description of the event.

4 Event Type

Indicate the type of event you're configuring. Choose from the following options:

- Person Note Added
- Person Anniversary
- Person Prayer Request
- Person Baptized
- Person Birthday
- Person First Attended Group Type
- Person First Joined Group Type
- Person History

Person History is an advanced tool that can be configured to provide powerful following recommendations. To learn more about this option,

see the Person History Following Event section.

5 Notice Required

We've already seen how people can choose which events to receive notifications for by changing their Following Settings. The "Notice Required" option means that individuals will always receive notifications for this event and cannot opt out from their Following Settings. Sometimes they should be given the option; other times you know what's best for them.

6 Send Weekend Notices on Friday

No one wants their birthday to be missed because it's the weekend. This setting allows you to send notifications for events that will occur over the weekend on the Friday before.

7 Notification Format

This is the Lava that will be merged into the email for each event. You'll probably want to copy/paste this from one of the standard events but feel free to modify it to meet your needs.

Each event type has additional settings you'll want to configure. For instance, the *Person Baptized* event type lets you configure an *Anniversary Count* that you can use to commemorate the person's baptism. The *Person Prayer Request* event type also has an option to include non-public requests in the notification. Be sure to review the settings for each event type to maximize its usefulness.

Never Forget A Birthday

Following events are great for a personal touch but if you want to have a fool-proof way of sending your best wishes to every person on their birthday then you may want to consider configuring a job to send an email to each person celebrating their birthday. Read more about how to do so in the [Rock Admin Hero](#)

[Guide](#).

You might also consider setting up a Reminder.

Person History Following Event

The *Person History* following event is an advanced setting that gives you the option of being notified when there are changes to a person's history, such as a change in their membership or marital status. As with other following event types, you can configure any number of specific events which people can subscribe to and receive notifications for. Let's look at how to set up the *Person History* following event option.

Following Event Configuration

- 1 Name**
Provide the name of the event. This will also be used for the title on the email so it's best to use a plural form of the word (e.g., *Birthdays* instead of *Birthday*).
- 2 Description**
Provide a brief description of the event.
- 3 Event Type**
Indicate the type of event you're configuring. In this case, *Person History*.
- 4 Notice Required**
This setting defines whether the follower gets to choose if they will receive this event. Sometimes they should be given the option; other times you know what's best for them.
- 5 Send Weekend Notices on Friday**
This setting allows you to notify people of events that will occur over the

weekend on the Friday before.

6 Active

Indicate whether the event is currently active.

7 Fields

This is where you specify which fields in the history data to monitor. Separate multiple items by a comma. Keep in mind that when viewing the fields in a person's history data, status changes are formatted as: 'Modified FIELD value from OLD to NEW'.

8 Max Days Back

Indicate the maximum number of days back to look at a person's history.

9 Negate Person

Use this setting when you want to trigger events only when it is NOT the specified person making the change. This sets the *Changed By* person match to NOT a person.

10 Person

This allows you to filter by the person who changed the value. This is always an AND condition with the two value changes. If the *Negate Changed By* option is also set, this becomes an AND NOT condition.

11 Matches Both

If enabled, requires a match on both the Old Value and the New Value. This equates to an AND comparison, otherwise it equates to an OR comparison on the values.

12 Old Value

This is the value to be matched as the old value. Leave this blank to match any old value.

13 New Value

This is the value to be matched as the new value. Leave this blank to match any new value.

14 Notification Format

This is the Lava that will be merged into the email for each event. You'll probably want to copy/paste this from one of the standard events, but feel free to modify it to meet your needs.

Let's look at an example of why and how you might use the *Person History* following event option.

Say you have a care ministry that helps people who are recently widowed. You can use the *Person History* following event to make sure those working in that care ministry are alerted when a person's marital status changes from 'Married' to 'Widowed'.

To track this change, you would create a new Following Event set with the basic information: Name, Description, Event Type (Person History) and Notification Format. Then you'd set the following options to capture the change in marital status:

- Fields = Marital Status
- Match Both = Yes

- Old Value = (blank)
- New Value = Widowed

These settings will cause a notification to be sent whenever a person's *Marital Status* field changes from any value to 'Widowed'.

This is just one of many uses for the *Person History* following event. You can see what a powerful and useful tool it can be.

Following Suggestions

Knowing who to follow can turn into a full-time job if you let it. But why? Rock can do the work for you. Administrators can set up suggestion criteria under [Admin Tools > System](#)

[Settings > Following Suggestions](#) .

Following Suggestion Type List

Following Suggestions
Home > System Settings > Following Suggestions

Name	Suggestion Type	Active
Family Members	In Group Together	✓ x
Fellow Small Group Members	In Group Together	✓ x
Fellow Staff Members	In Group Together	✓ x
Known Relationship	In Group Together	✓ x
Serving Team Member	In Group Together	✓ x

50 | 500 | 5,000 | 5 Suggestions

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Rock ships with two suggestion types: *In Group Together* and *In Followed Group*. You can see how these types can be used in several different ways. You can even add your own suggestion types with a little bit of light development.

To add a new following suggestion, click the button at the top or bottom of the grid. This will bring up the page pictured below.

Following Suggestion Configuration

- 1 Name**
This describes the suggestion and will be used as the title in the daily suggestion email that's sent out.
- 2 Active**
The suggestion must be Active in order to be used.
- 3 Description**
A brief description of the suggestion can help clarify its purpose or intent.
- 4 Suggestion Type**
Select the type of suggestion that's being configured. As noted above, two suggestion types are shipped with Rock.
- 5 Reason Note**
A brief message that's shown to the individual, describing why the person is being suggested to them.
- 6 Reminded Days**
The number of days to wait before notifying the person of this suggestion

again if they haven't followed the suggestion. Leave it blank if the person should never be reminded.

7 **Auto-Follow**

This setting will turn the following 'suggestion' into a 'requirement' for following. In other words, the person won't be given the option to follow the individual, it will automatically follow when a new person is added to the group.

8 **Suggestion Type Settings**

Note that each suggestion type will have its own setup options. The sample pictured above shows the *In Group Together* settings. The next section below is a guide to what these settings mean.

9 **Notification Format**

This is the Lava that will be merged into the email for each person being suggested. You'll probably want to copy/paste this from one of the standard suggestions but feel free to modify it to meet your needs.

In Group Together and In Followed Group Settings

The settings below are available to the *In Group Together* and *In Followed Group* suggestion types.

- **Group Type:** The group type that's used.
- **Group:** The optional group that the person must belong to for the suggestion. Make sure to pick a group of the same type that was selected above.
- **Security Role:** This is similar to the group limiter above, but for a specific security role.
- **Follower Settings:** Next, we can limit who the follower role will be. To do this we need to provide both the group type and role (we must provide the group type again as this helps to limit the roles that will be displayed in the role dropdown).
- **Following Settings:** Lastly, we can limit who will be suggested according to a security role. Only individuals assigned the role provided here will be suggested. Again, we must provide both the group type and the role.

Reducing the Confusion

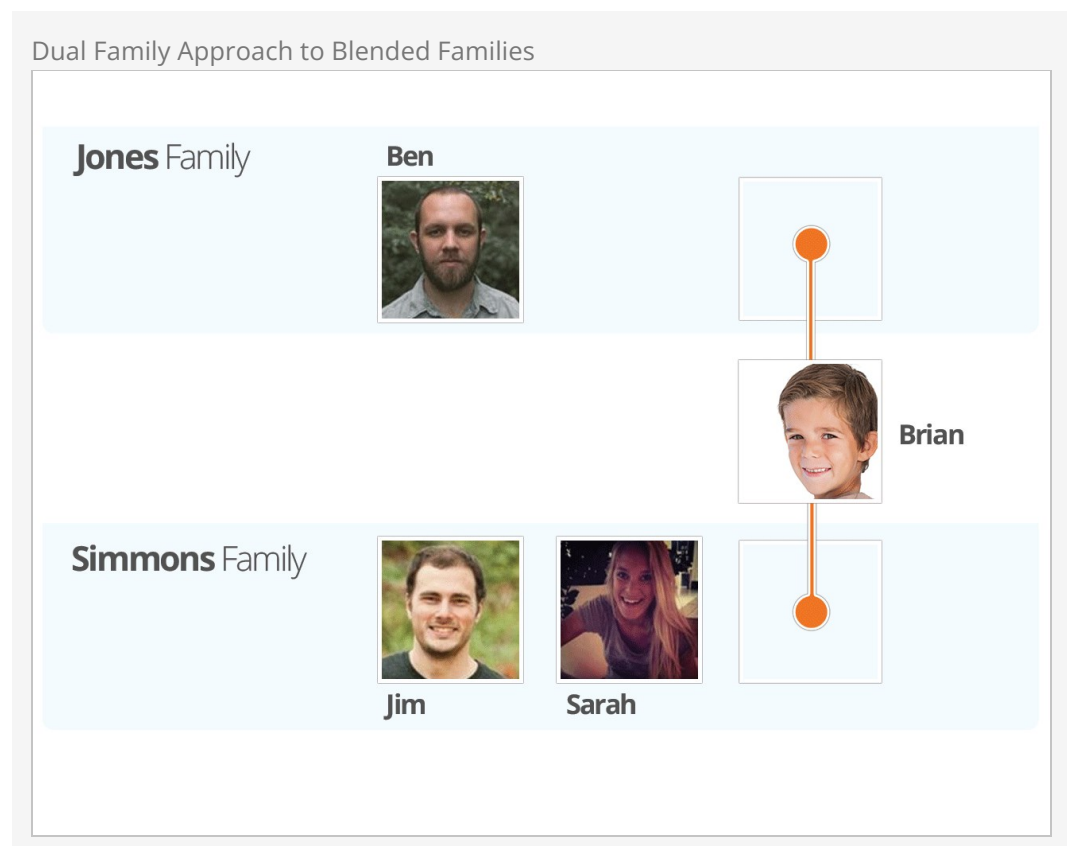
The settings above can be a bit confusing. If you're feeling overwhelmed, looking at the settings for the suggestions that ship with Rock can help reduce this confusion.

Strategies for Blended Families

Families come in all shapes and sizes. Managing the complexities of relationships, whether in real life or a database, can be complicated. Luckily, Rock is very flexible. Below we discuss some of the options for entering blended families.

Dual Family Approach

When parents have dual custody and both parents are involved with your organization, you may wish to use the dual family approach. In our example below Ben and Sarah Jones divorced a couple of years ago. Both have joint custody of their son Brian. Sarah went on to marry Jim Simmons. This is one way to set up these two families.



In this example Brian, the child, is in both families. He is still one record in the database, but he is a member of both families. This approach has some details you should know about.

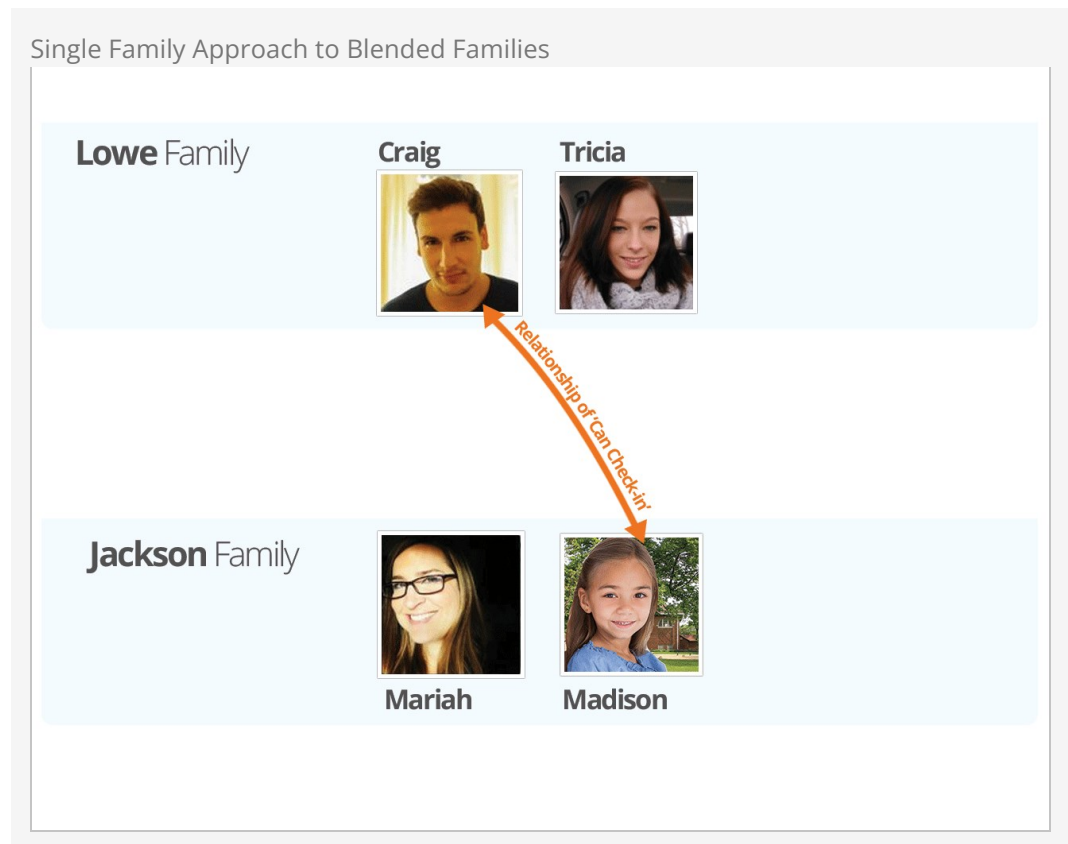
- In reporting, Brian will be listed as a single record. However, if your reports list

families, this pattern will add two families to the results.

- Brian can be checked in using either family's contact information.
- Mailings will be sent to both home addresses.
- A report showing the parents of Brian will include Ben Jones as well as Jim and Sarah Simmons. Each family will be listed as separate rows on the report.

Single Family with Relationships Approach

In the single-family approach the children of blended families are only connected to a single family and relationships are used to link them to other individuals (e.g., for check-in).



This approach may be preferable in cases where one parent has sole custody or if the other family doesn't participate in your organization. In this approach, reporting and most other features act just like a typical family. Check-in can be allowed by other individuals using the relationship of *Can Check-in*.

What About Foster Families?


Rock's flexibility also comes in handy when adding foster families. The best approach is to add the children to the family, and then create a new Known Relationship type that designates them as fosters.

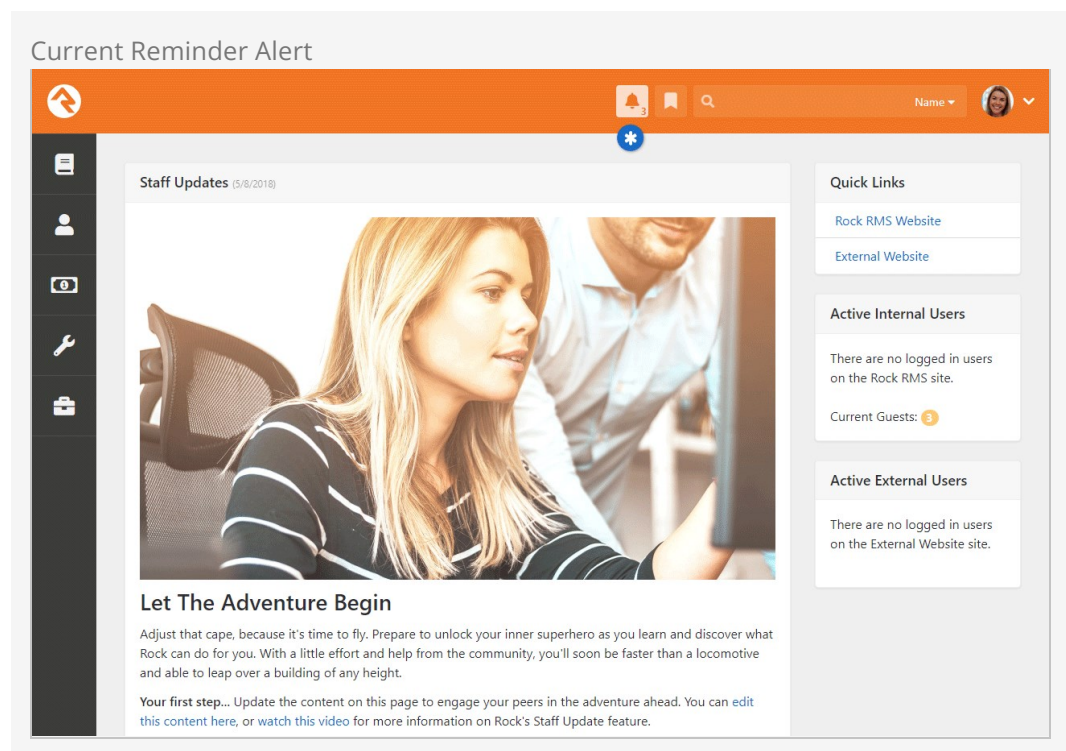
Reminders

Reminders are for those things we always want to do, but often forget. We truly intend to follow up with people or write them a card or send them an email, but then life happens and these things get pushed to the back of our minds where they're eventually forgotten. It happens to all of us. But with *Reminders*, staying organized and on top of all your commitments has never been easier.

By setting up reminders for key events and tasks, you'll never miss an opportunity to make a positive impact on those around you. For instance, by reminding yourself to check in with someone regularly, you're demonstrating that you value relationships. Whether you're a busy volunteer or a church leader, reminders are the perfect tool to help you stay organized and build deeper connections.

Viewing Reminders

To start, you can access your reminders from any page in Rock by clicking the  icon in the header. This is also where you'll add new reminders, but we'll get to that later.



From there you can choose to *View Reminders* and see a filterable list of your

reminders.

Reminders can be in different states. For instance, you either still need to be reminded (*Active*) or you've already been reminded and taken action (*Complete*). *Active* reminders can be *Due* or *Not Due*. This is determined by the *Reminder Date* you select when creating the reminder, which we'll look at shortly.

- **Active:** If a reminder is Active, it means you haven't been reminded yet or you haven't taken action on it yet
- **Complete:** A reminder is Complete if you've already been reminded and taken action
- **Due:** This means that it's time to take action on the reminder, and that you've been reminded via communication or workflow
- **Not Due:** These are Active reminders that have *Reminder Dates* in the future

The screenshot shows a 'Reminder List' interface. At the top, there's a navigation bar with a home icon, a notification bell with '3', a search icon, and a user profile dropdown. Below this is a sidebar with icons for home, user, calendar, settings, and a briefcase. The main content area is titled 'View Reminders' and includes a breadcrumb 'Home > My Dashboard > View Reminders'. Underneath, there's a 'Reminders' section with a filter dropdown set to 'All Reminders'. To the right of the filter are icons for 'Active', 'Due', and 'All Reminder Types'. The list contains three items, each with a date of '12/14/2022' and a close button (x):

- Ted Decker** (Hospital Visit): Follow up with Ted about his mother being in the hospital.
- Group Follow-Up**: Check in with Children's leaders to ensure that all members have been through the proper training.
- Bill Marble** (General): Call Bill to check on the status of his mother. She was in the hospital recently and he was going to hear an update in the next few weeks.

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


In the screenshot above we see three reminders. All of them are both *Active* and *Due*, which we can tell from the filter selections near the top of the block. These are reminders on which you want to focus and take action. With filters like this you won't see *Not Due* reminders, so your screen isn't cluttered with every reminder due in the future.

You can change the filters to see items that aren't due yet. After you've been reminded and have done what you need to do, you'll *Complete* the reminder, taking it off your list.

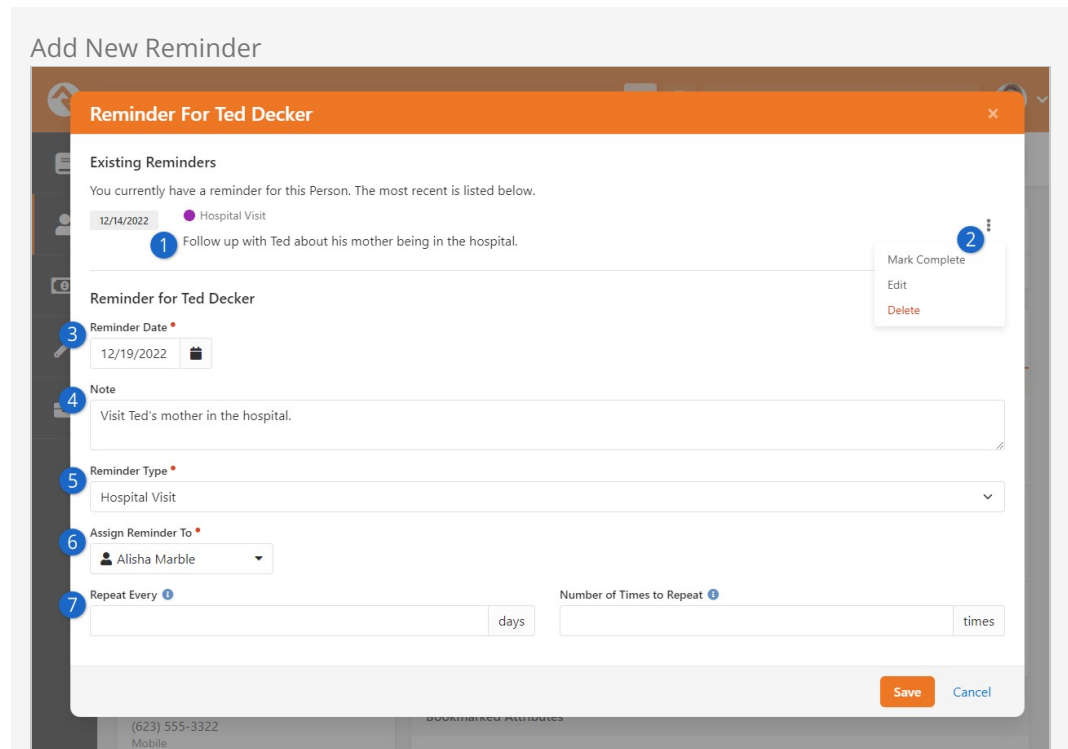
Adding Reminders

There are two ways to add reminders. You can add a reminder manually from pages with context, or you can add a reminder in an automated way using a workflow action. We'll look at each method below.

Adding Reminders Manually

You can view your current reminders from anywhere in Rock by clicking the  icon. This is also where you'll go to add new reminders. You can add reminders from just about anywhere, all you need is a reminder type and a page with context.

To add a new reminder for an entity you need to be on a page that has context for that entity. There will also need to be a corresponding reminder type for the entity. For instance, a reminder of type "Hospital Visit" has an entity type of *Person*, so you can add that reminder from the *Person Profile* page. Similarly, you can add group reminders from the *Group Viewer* page when you have a group selected.



1 Existing Reminders

If you have any reminders for the item (e.g., person, group) you're looking at, Rock will let you know at the top of the screen. This gives you some context but also helps avoid duplicate reminders.

2 Update Existing Reminders

If you click the three dots to the right of the existing reminder you can choose to mark it as complete, edit it or delete it.

3 Reminder Date

This is where you'll select the date on which you want to be reminded. When this date hits, the communication or workflow configured for the reminder type will be processed. It is based on this date that the reminder is either *Due* (the date has arrived or passed) or *Not Due* (the date is in the future). You can also filter your reminders by date when viewing your reminders list.

4 Note

You can provide an optional note, to help specify why this specific

reminder is being placed on the entity.

5 Reminder Type

As described in the prior section, the reminder type controls things like which notification settings (communication or workflow) the reminder will use when the reminder date arrives. You'll want to choose the reminder type most applicable to the reminder you're adding.

6 Assign Reminder To

By default, the reminder is assigned to yourself, but it can be assigned to other people. You won't be able to see the reminder after it's created if you assign it to someone else.

7 Repeat Settings

These repeat settings allow you to have the reminder repeat itself. For instance, you can set it to repeat every seven days with nothing in the *Number of Times to Repeat* field to have a weekly reminder that repeats indefinitely. Just remember that the clock starts ticking only after you've *Completed* the current reminder. So, if a weekly reminder was due on 3/7 and you completed it on 3/10 then the next reminder would be due on 3/17.

Adding Reminders via Workflow

Reminders can be added in an automated way using workflows. There's a workflow action type dedicated to this. You can find information about this action in our [Workflow Actions](#) documentation.

Workflow Action

Reminder Add

Name *
Reminder Add Action is Completed on Success
 Activity is Completed on Success

Action Type 'Reminder Add' Overview
Adds a reminder to a person's list of reminders.
Reminder Add

Reminder Type i
Campus Reminder

Person to Remind i
Person

Reminder Entity Id or Guid i or Attribute Value
2

Note i or Attribute Value
Campus Reminder

Reminder Date i or Attribute Value
{{ 'Now' | DateAdd:1,'d' }}

Repeat Every (days) i or Attribute Value
30

Number of Times to Repeat i or Attribute Value

Reminder Types

Reminder types help group, secure and organize individual reminders. Each reminder type is associated with an entity in Rock, so you can have reminders for just about anything. There are a few examples in the screenshot below to help get you thinking about what reminder types you might configure. To configure reminder types, navigate to [Admin Tools > General Settings > Reminder Types](#).

Reminder Type List

Reminder Types

Home > General Settings > Reminder Types

Name	Entity Type	Active
General	Person	✓
Hospital Visit	Person	✓
Group Follow-Up	Group	✓
General	Group	✓

50 500 5,000 4 Reminder Types

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You have many options for setting up reminder types. For instance, do you want to receive a communication when the reminder becomes *Due*, or should a workflow launch and do something for you? Remember, you can set up reminder types for any entity type. All you need to make a reminder is a reminder type and a page with context.

Edit Reminder Type

Edit Reminder Type

Name • Personal Reminder

Active

1 Description
Used for general reminders for people.

2 Notification Type • Communication

Notification Workflow 3

4 Should Show Note

Entity Type • 5 Person

6 Should Auto-Complete When Notified

Highlight Color
rgb(33,159,243)

Save Cancel

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- 1 Name and Description**

It's helpful to give your reminder types a meaningful name and clarifying description, especially as your list of reminder types grows.
- 2 Notification Type**

You can choose to be notified (i.e., reminded) by receiving a communication, or via a workflow. We'll talk more about Notification Types below.
- 3 Notification Workflow**

This is where you select the workflow to launch when it's time to be reminded. This is optional unless you selected "Workflow" as your *Notification Type*
- 4 Should Show Note**

This controls whether the note associated with the reminder should be included in the reminder email system communication. We'll talk more about this below.
- 5 Entity Type**

This is where you decide if the reminders are going to be for people, groups, campuses or any other entity. You might have multiple reminder types with similar names and purposes for different entities.
- 6 Should Auto-Complete When Notified**

The reminder will stay active after you've been notified unless this is checked. You might select this if all you need is to be notified.

Every reminder you create will be of one of the types you configure as described above. You can create as many as you need, and you can assign security to each one if it's only

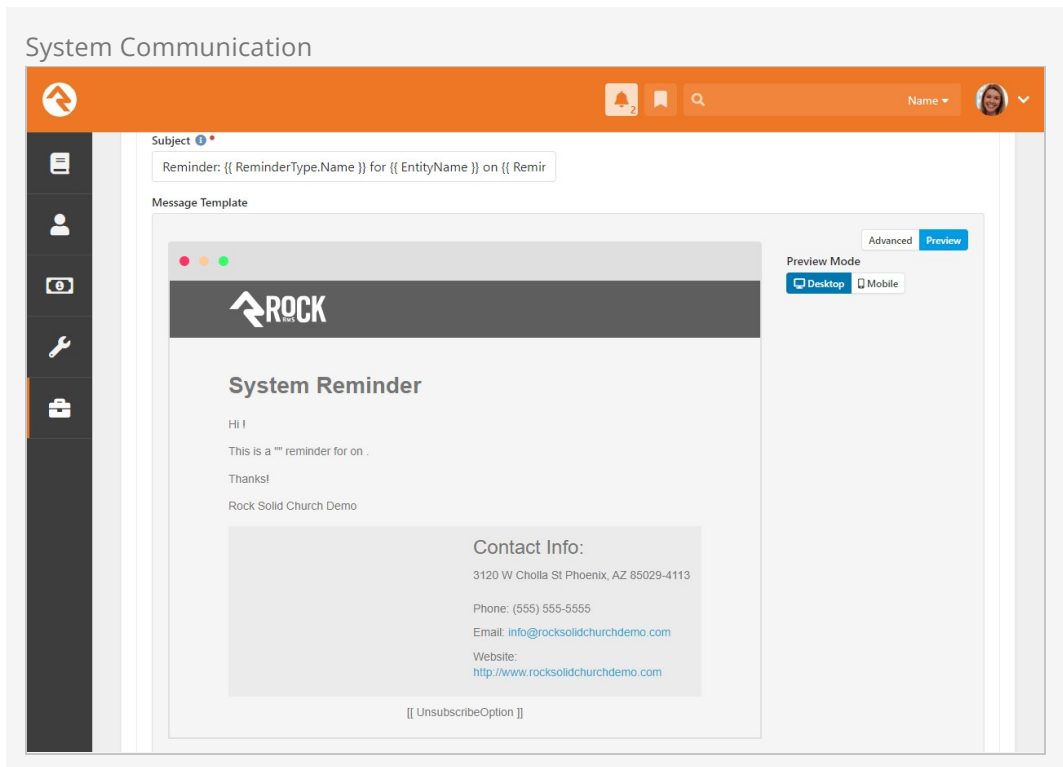
available for certain roles or individuals. In the next section, we'll see how these reminder types get used to create reminders.

Notification Types

You can be notified in one of two ways when a reminder's date arrives. You can be sent an email, or you could launch a workflow that performs certain actions and then perhaps notifies you in a different way. We'll look at both of these methods below.

Communication

If you choose a *Notification Type* of Communication when configuring your reminder type, the person assigned to the reminder will receive a system communication when the reminder date arrives. The template for this communication can be found under `Admin Tools > Communications > System Communications` and is called *Reminder Notification*.



If you want to use a different system communication than the one provided, you can change which one is used by updating the *Process Reminders* job configuration. We'll talk more about that below.

Workflow

You can choose to have the reminder launch a workflow instead of sending you a communication. Of course, you can configure the workflow to send you a communication. When the reminder date arrives for a reminder configured to launch a workflow, the workflow will launch and will be passed the following items if the workflow has matching keys:

1. Reminder
2. ReminderType

3. Person
4. EntityType
5. Entity

Workflow Attributes

Advanced Settings

Attributes Count: 5


Attribute	Description	Key	Field Type	Required
Reminder		Reminder	Text	
Reminder Type		ReminderType	Reminder Type	
Person		Person	Person	
EntityType		EntityType	EntityType	
Entity		Entity	Entity	

Activities

+ Add Activity

Start

Process Reminders System Job

The *Process Reminders* job is what will trigger the communication or workflow that's configured for your reminder type. Depending on the configuration of your reminder type, the job will also mark reminders complete after their notification has been processed. Lastly, the job will recalculate the active reminder count shown near the  icon in page headers.

Process Reminders Job

Scheduled Job Detail
Home > System Settings > Jobs Administration > Scheduled Job Detail

Add Service Job

Name ^{*} Active

Description

Notification Status Cron Expression [?]

Notification Emails [?] Job History Count [?]

1 Job Type ^{*}

2 Reminder Types Include [?]
 Group - Group Reminder Person - Personal Reminder

3 Reminder Types Exclude [?]
 Group - Group Reminder Person - Personal Reminder

General

Command Timeout [?]

4 Reminder Notification [?]

5 Max Reminders Per Entity Type [?]

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1 Job Type

You'll want to ensure this is set to *Process Reminders*. Rock ships with a Process Reminders job configured for you out of the box, so it's unlikely you'll need to change this.

2 Reminder Types Include

You might only want to include certain Reminder Types in this job. This lets you set up different jobs to process different reminders. By default, all Reminder Types are included.

3 Reminder Types Exclude

This is similar to the above setting but excludes Reminder Types rather than includes them. By default, no Reminder Types are excluded.

4 Reminder Notification

Rock ships with the *Reminder Notification* System Communication, which is configured for use by this job.

5 Max Reminders Per Entity Type

You don't want people to be overwhelmed with an excessively long list of reminders in an email. This setting helps you limit how many reminders the communication contains, by entity type. Rock ships with this set to 20, which means you could have an email containing 20 reminders for People

and 20 reminders for Groups.