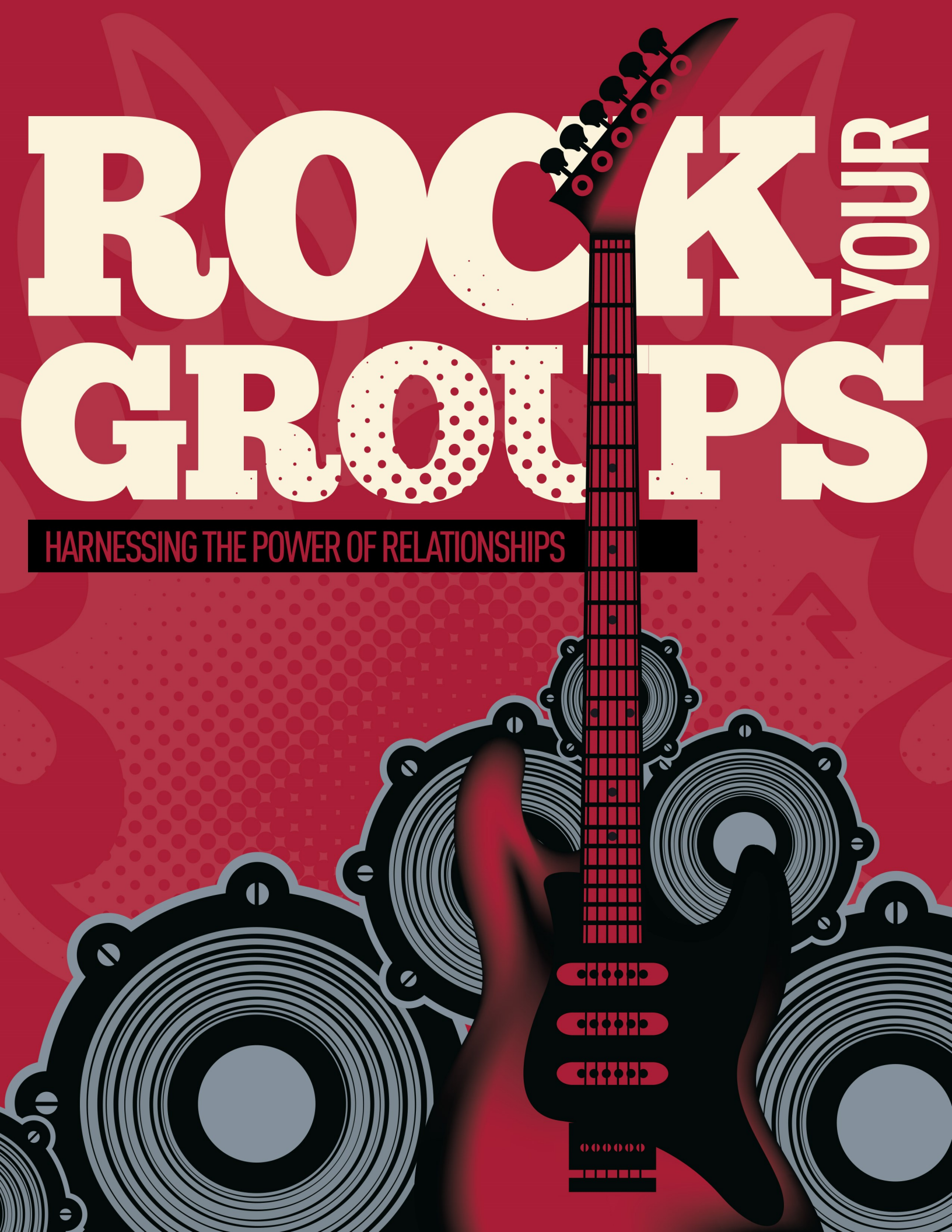
ROCK YOUR GROUPS

HARNESSING THE POWER OF RELATIONSHIPS



Overview

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

- **Families:** Each family is stored as a group. This is incredibly powerful because families get the same power and functionality as any other Group Type. In the beginning you'll want to leave families configured just the way you found them. As you create new Group Types and gain more experience with groups, keep in mind that you can add new attributes and additional functionality to the family Group Type.

- **Security Roles:** These groups help secure Rock data. While you'll use these groups a majority of the time for security, you'll soon discover that any group in Rock can act as a security role.

- **Check-in Groups:** Rock's check-in features use groups to store the locations where kids can check in and to track attendance.

- **Serving Teams:** While we have big ideas for how serving teams will work in the future, we have configured a simple group type to get you started with tracking your groups.

- **General Groups:** It's likely that you'll be creating several groups that don't warrant their own specific group type. In these cases feel free to create them as 'General Groups'.

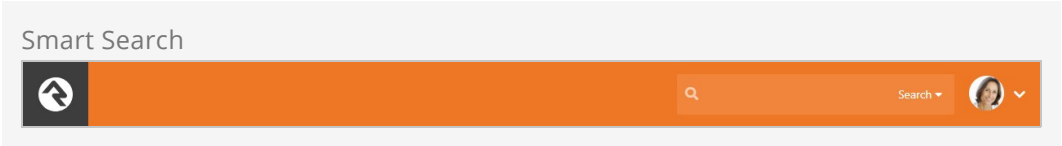
- **Application Groups:** Rock needs to keep track of various lists of people. For instance people who have opted out of getting future photo requests. These 'lists of people' are stored as Application Groups. Application groups can be viewed/managed under `Admin Tools > System Settings > Application Groups`.

- **Small Groups:** We've added a generic Small Group group type. Feel free to use this as a base to build from if your church has a groups ministry.

- **Small Group Sections:** This group type works in conjuction with the Small Group type and acts as a leadership level to provide hierarchy for your groups. Again, feel free to use this type as a launching point for getting started.

Searching for Groups

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



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

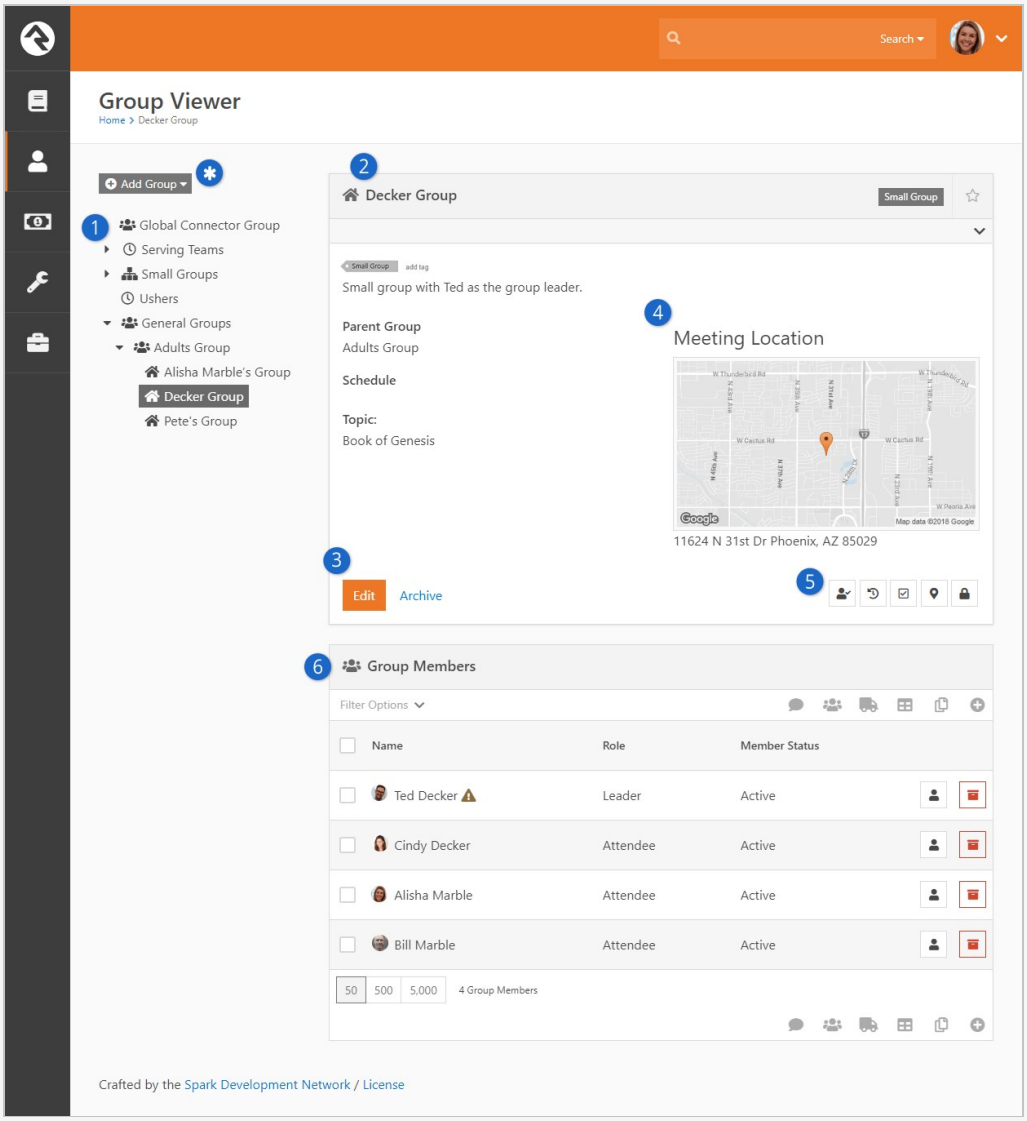
Decker
Bible Study
Ted Deck

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

Group Viewer

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

Group Viewer



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

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

2. **Group Details**
   Displays information about the group including adding tags.

3. **Action Bar**
   Options to edit or delete a group.

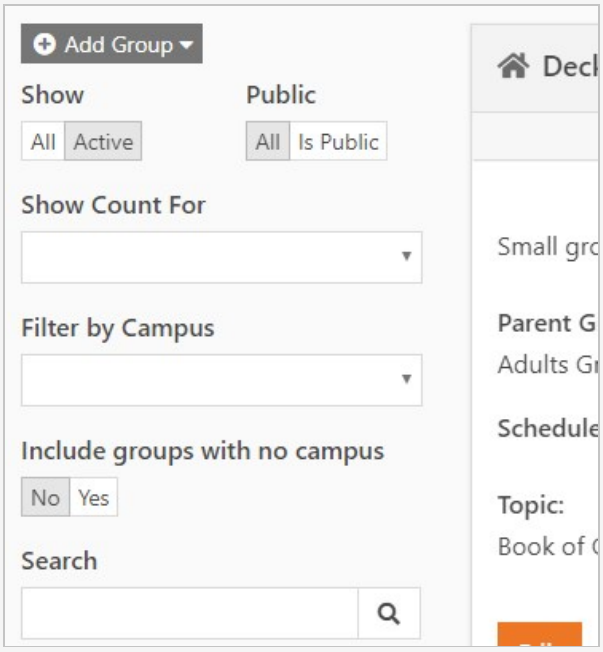
4. **Group Maps**
   The viewer will display maps for each group location that is able to be mapped. You can click on the map to see a larger interactive map. You can also click on the map marker button directly below the maps to see the interactive map.

5. **Actions**
   Below the maps you'll find buttons for a few key actions.
   - Takes you to the group *RSVP List* page (see Administering Group Types).
   - Takes you to the *Group History* page (see Group History).
   - Allows you to manually enter in attendance for the group.
   - Takes to you an interactive map where you can view all the people who are members of the group.
   - Using the security button you can control who has access to view and edit this specific group. See the Securing Groups section below for more information on how you can secure your groups.

6. **Group Members**
   List of member inside the group.

The group view has a couple of other interesting features you should be aware of. Notice the icon next to the asterisk call out in the figure above. This gear only shows when you hover near the area. Clicking it will show you several advanced features in the tree view. Let's open it up and see what's inside:

Group Viewer



You'll notice:

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

> Archived Groups
> When a group has been marked as Archived and you want to bring it back go to: `Admin Tools > General Settings > Archived Groups` Click on the ↺ icon to unarchive the group.

Group Maps

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

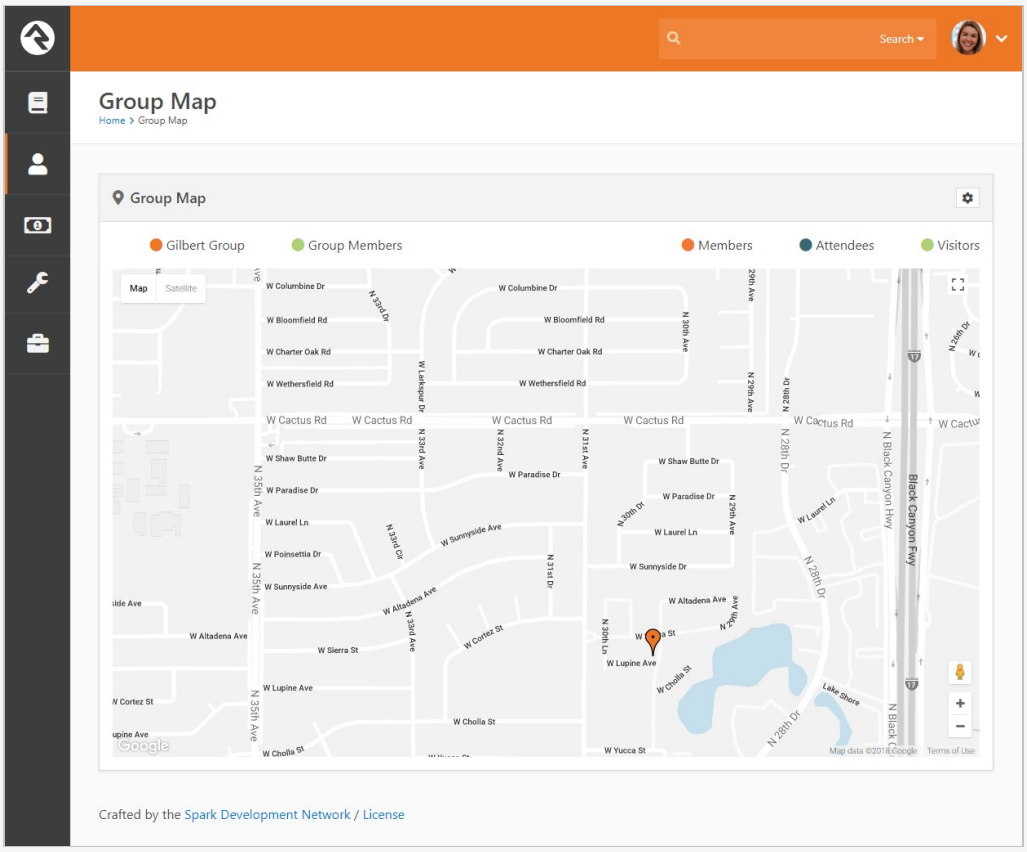
If the group has a geopoint (determined through the address geocoding process or by selecting the point on the map) the location of the group will also be present on the map.

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

Limiting The Display of Certain Connection Statuses

In order for a connection status to be displayed as a label, the status must be configured with a 'Color' attribute. This helps determine the pin color for the map marker as well as acts as a global setting to help determine which connection statuses should be mapped. You can set the color for a connection status under `Admin Tools > General Settings > Defined Types > Connection Status`.

Group Map



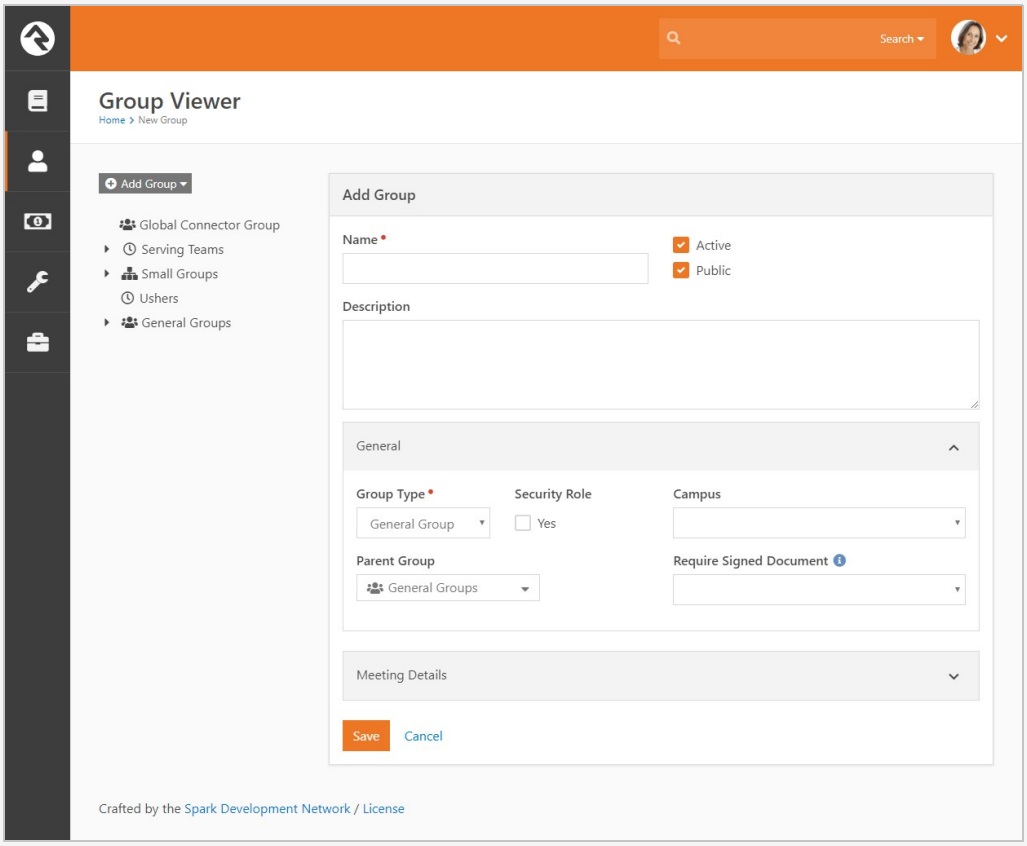
Adding a Group

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

Note

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

Adding a Group



Group Details

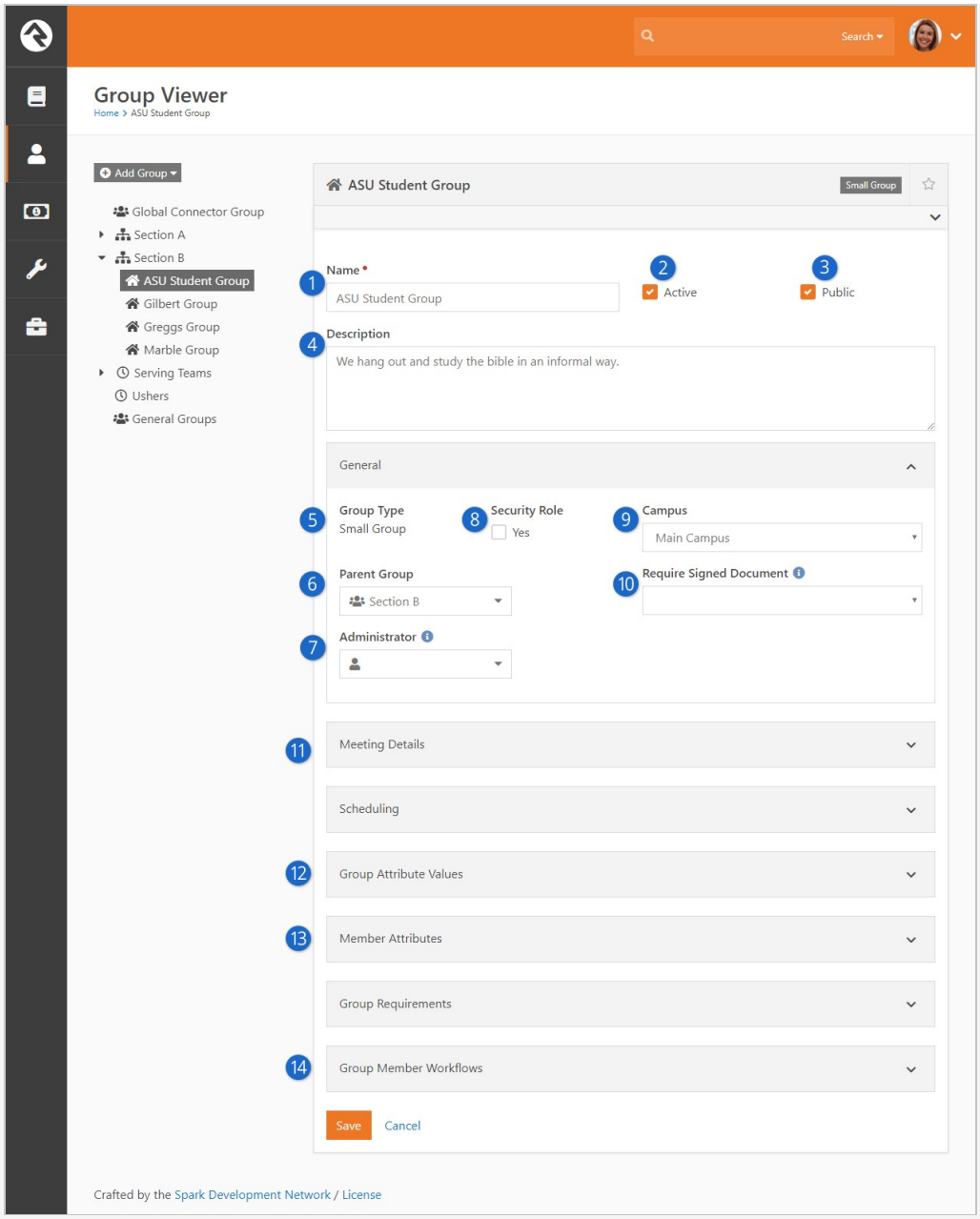
The group details section displays all of the information about the group. The group type and campus (if configured) will be shown as labels in the banner at the top. A map of the group's location will also be shown, if configured.

Editing a Group

Clicking the `Edit` button from the detail section will allow you to edit information about the group and provide additional configuration settings.

The key features of the edit screen are discussed below.

Editing a Group



1 **Name**
Update this field to change the name of the group.

2 **Active**
You can inactivate the group by deselecting this checkbox. See Inactivating a Group for additional details.

3 **Public**
Only groups that are marked as Public can be viewed in the Group Finder.

4 **Description**
Providing a good description for the group lets people know what the group is all about.

5 **Group Type**
Changing the group type of an existing group is possible, but it does have some consequences. All group attribute data for the group will be lost if

the group type is changed.

6. **Parent Group**
   Changing this will move the group to a new parent in the hierarchy. Removing a parent group will move the group to the root or top of the tree.

7. **Administrator**
   Select the individual who is responsible for administrating the group. This will only appear if *Show Administrator* is enabled for the group type, and may be labeled differently (e.g. Coordinator, Director) if an *Administrator Term* has been configured. Group administrators don't have the security privileges of Leaders, and they aren't members of the group. Generally, this is only used for internal purposes to identify who is responsible for the group from an organizational perspective without having to add that individual to the group.

8. **Security Role**
   This option will enable the group to operate as a security role. The members of the group will be granted access to whatever privileges the group is granted.

9. **Campus**
   Providing an optional campus will link the group to a specific campus. This isn't shown if you have only one campus.

10. **Require Signed Document**
    This setting determines if the members of the group require a signed document/waiver to be in the group. Rock can automate the sending of requests to get digital signatures after each registration. We cover this topic in detail in the `Admin Hero Guide`.

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

12. **Group Attribute Values**
    Any group attributes values added by the group type will be available here for editing.

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

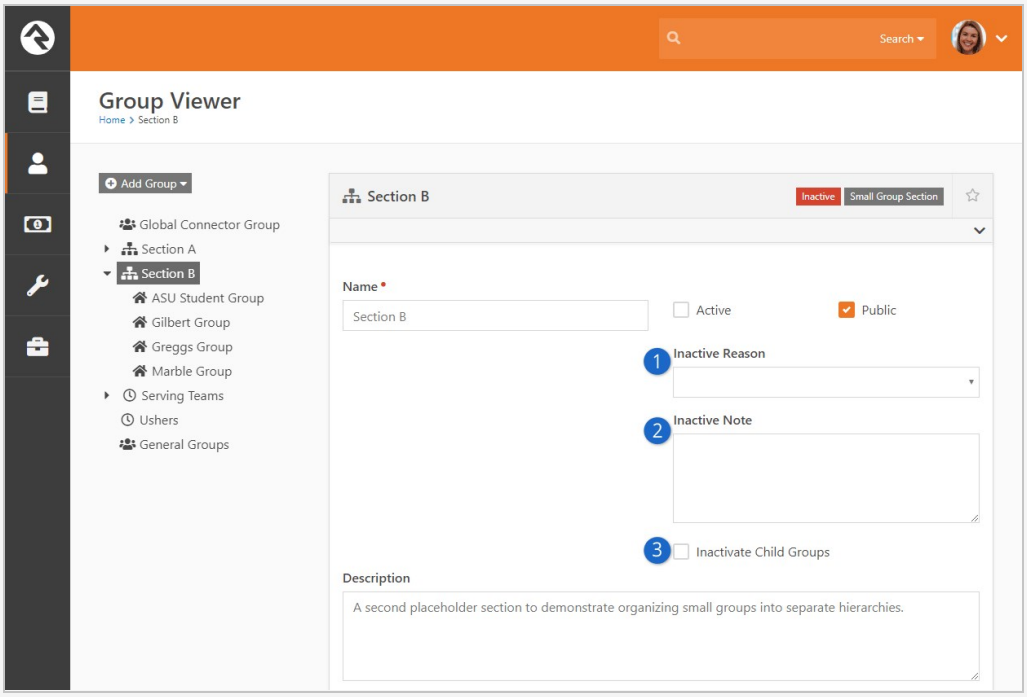
14. **Group Member Workflows**
    This section allows you to configure workflows that will be launched when specific events occur with group members.

> **More Information Below**
>
> You may notice that we skipped over a few sections above. Additional information on these areas are covered in later chapters of this guide.

Inactivating a Group

If enabled in the Group Type settings, you'll be prompted to provide additional details after inactivating a group.

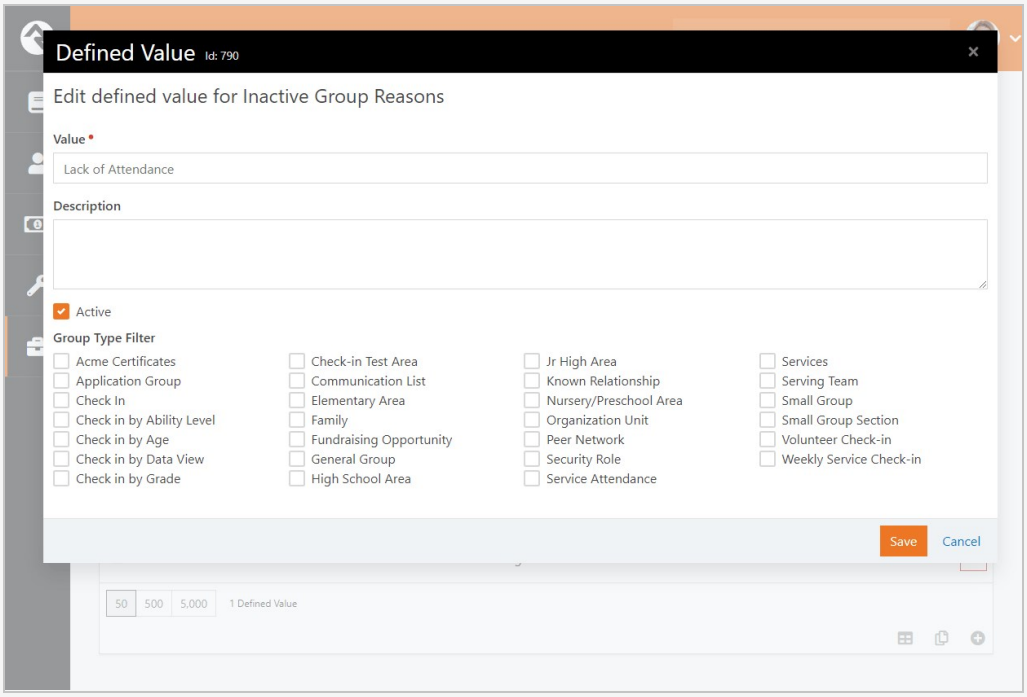
Inactivating a Group



1. **Inactive Reason**
   Select a reason for inactivating the group. Depending on the Group Type settings, the Inactive Reason may be optional or required.
2. **Inactive Note**
   Additional details can be recorded here for future reference. Notes are optional, even if a reason is required.
3. **Inactivate Child Groups**
   If there are child groups, you can choose whether to inactivate them also. You'll be given this option any time an inactivated group has child groups.

The list of Inactive Reasons is maintained under `Admin Tools > General Settings > Defined Types > Inactive Group Reasons`. You can restrict which Group Types the reason can be applied to. If no Group Types are selected, the reason can be used with groups of any type.

Inactive Group Reasons Defined Type



Group Types

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

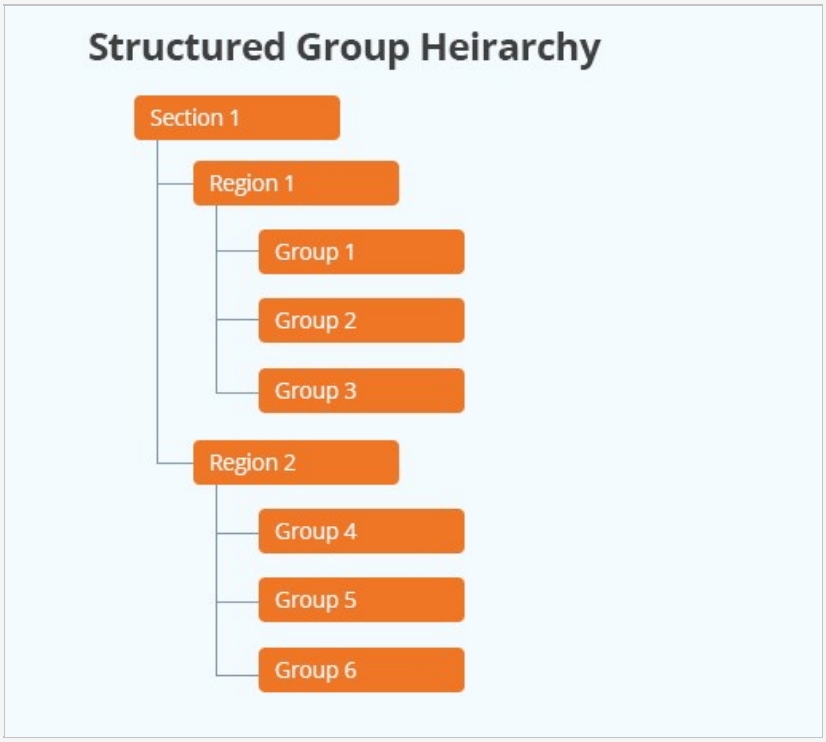
> Tip:
> Once you realize the power of group types, you'll be tempted to start creating many custom types to fit each of your ministries. Don't do it! Resist this temptation at first. Less is more. Look for common points within your many ministries. This will help you reduce the number of group types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

Group Hierarchy

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

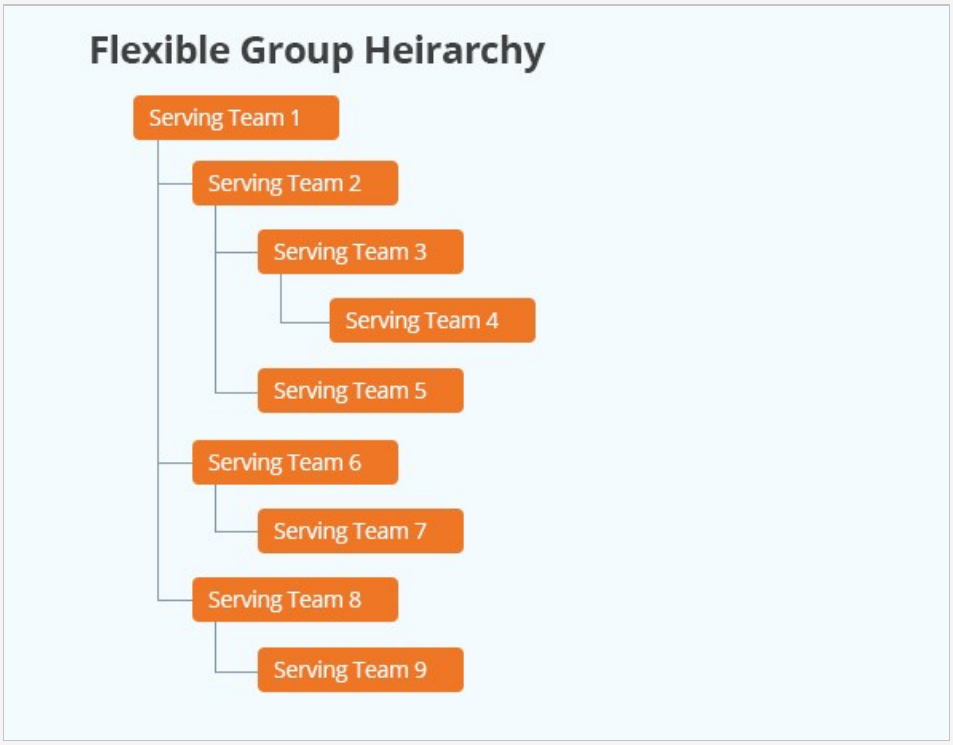
- **Structured Hierarchy:** In this configuration, the levels of hierarchy are defined and limited. For example, you may want to define the hierarchy of your small group ministry to have a single leadership team, under them a level of lay leaders who act as coaches to the groups, and then the groups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

Example of Structured Group Heirarchy



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

Example of Flexible Group Heirarchy



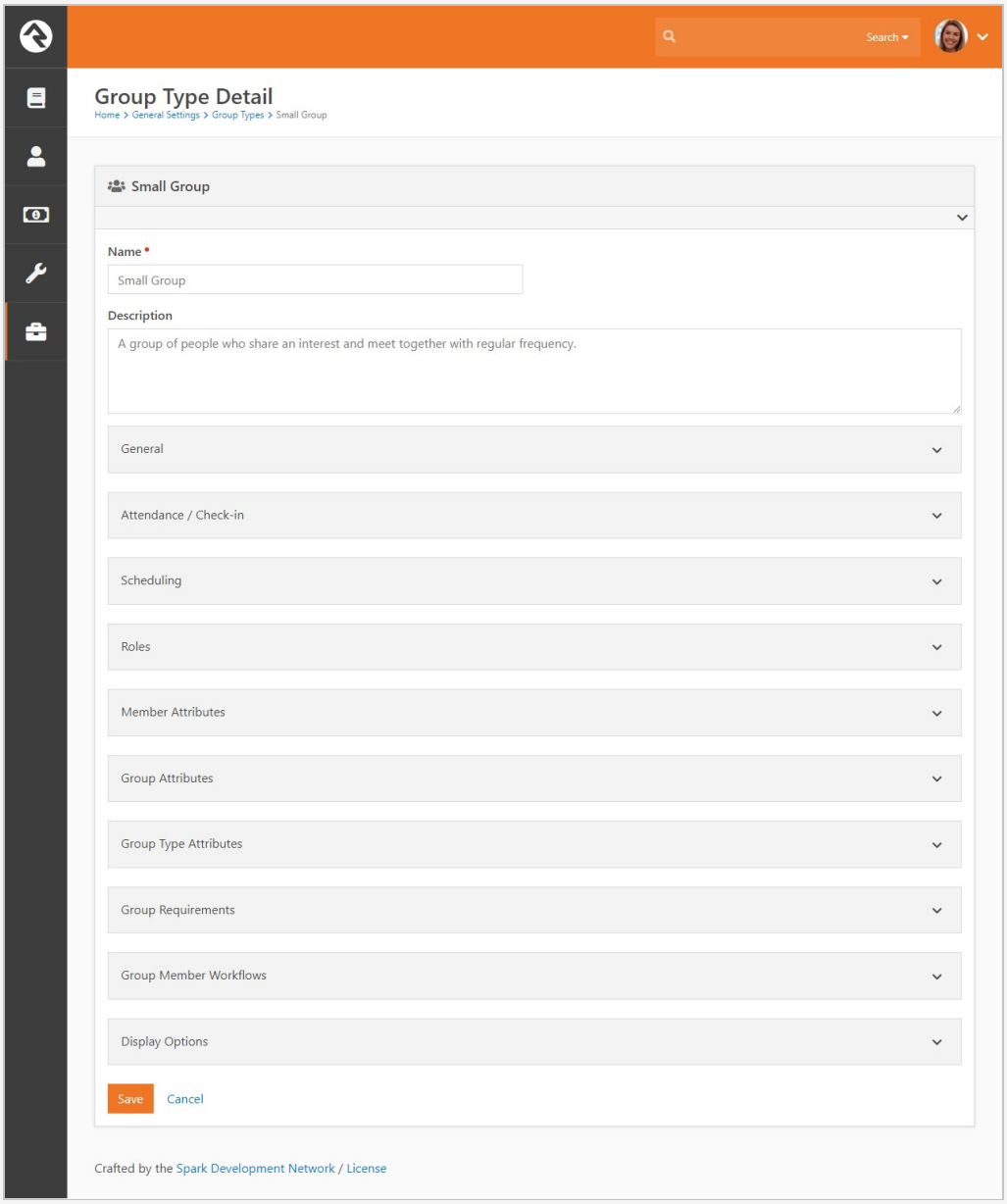
You define these hierarchies by configuring what child groups each group type can have. In the structured example, you would create a group type called *Small Group Leadership*, which would allow child group types of *Group Coaches*, which would allow child groups of *Small Groups*. The *Small Groups*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

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

Administering Group Types

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

Group Type Editor



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

Show/Hide Group Type Settings

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

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

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

Common Group Type Settings

Setting	Description	Example
Group Term	This is what Rock will use to describe the group on the various screens.	Group, Family, Event, Team
Group Member Term	This is what Rock will use to describe the people in the groups on the various screens.	Member, Individual, Participant
Roles	Roles describe the relationship of the individual to the group. Are they a leader? Or just a member?	Leader, Member, Prospect
Default Group Role	The default role to use when someone is added to the group.	Selection of one of the roles defined to the group.
Child Group Types	As we discussed above, child group types help determine the hierarchy of the group tree. This tells Rock what kind of groups can be added as children of the current group.	Serving Teams may allow Child Serving Teams
Location Types	The types of locations that can be assigned to the group.	Meeting Location
Location Selection Mode	Determines how locations should be selected in Location Picker.	The following options are available: • Named - Allows you to pick from named locations that have been defined under `Admin Tools > General Settings > Named Locations` • Address - Allows the input of a new

Setting	Description	Example
		street address for the location. • Point - Displays a map that allows for the selection of a specific latitude/longitude point. • Geo-fence - Also displays a map that allows for drawing a polygon shape to use as a geo-fence. • Group Member Address - Lists all of the addresses associated to the group members of the group. Note that if the address of the group member changes the meeting location will not be automatically updated to this new address.
Multiple Locations	Determines if the group can have multiple locations.	True/False
Group Attributes	The custom attributes that each group will have.	Meeting Day, Meeting Time, Topic of Study
Group Member Attributes	The custom attributes that each group member will have.	Hours Per Week Serving, Assigned Bus
Group Capacity Rule	Rock allows you to set individual capacities for groups. This configuration setting determines how the capacity should be enforced.	The following options are available: • None - This disables the group capacity features. • Hard - This places a hard limit on the capacity. Once the capacity is reached no

Setting	Description	Example
		additional group members can be added. • Soft - The soft option will warn you when adding a member that is over the group's capacity, but still allows you to add them.
Groups Require Campus	This setting will require that all groups of this type have a campus when adding and editing.	True/False
Show Administrator	This setting determines if groups of this type support assigning an administrator for each group. Group administrators don't have the security privileges of Leaders, and they aren't members of the group. Generally, the group administrator is only used for internal purposes to identify who is responsible for the group from an organizational perspective. This is super useful in reporting because you can easily identify all the groups associated with an individual without having to add that individual to any of those groups.	Check Yes or leave blank
Administrator Term	This setting allows you to customize the term used for the administrator of the group.	Administrator, Coordinator, Director
Enable Group Tag	This determines if tags are allowed for the group.	True/False
Group RSVP Enabled	This setting enables group RSVP features for groups of this type.	Check Yes or leave blank
Enable Inactive Reason	If enabled, an *Inactive Reason* may be provided when inactivating a group.	True/False
Require Inactive Reason	Determines whether an *Inactive Reason* must be provided when inactivating a group.	True/False

Attendance and Check-in Settings

Setting	Description	Example
Takes	Determines if the group takes	True/False

Setting	Description	Example
Attendance	attendance. This will help to enable check-in and metrics features.	
Weekend Service	Determines if attendance for this group should be counted towards attending a weekend service. For example the attendance badge on person profile will only consider attendance to groups with this value enabled.	True/False
Group Scheduling Options	This setting is used when you want to configure a schedule for the groups of this type. The schedule is used for features like group attendance and group member scheduling. The options you select here help determine the types of schedule that can be configured for the groups.	Schedule type options include: • Weekly: This option allows a simple weekly schedule to be selected. When setting up a group of this type, all you'll need to do is select the day of the week the group meets and the start time. We highly recommend that you use this setting as it is the only schedule option that is usable as a filter in the group finder. • Custom: With this option enabled each group can select its own repeating schedule. This option allows for the most power and flexibility, but when used the schedule created can't be used as a filter in the group finder. • Named: The named option allows you to pick the group's schedule from a list of preconfigured schedules. These schedules are configured under `Admin Tools > General Settings > Schedules`. Like the *Custom* option this setting can't be used as a filter in the group finder.
Schedule Exclusions	This setting allows you to define a set of date ranges when all of the groups of this type will not meet regardless of the specific group schedules. This allows you to easily configure breaks and holidays without having to	Set of date ranges when groups of this type will not meet.

Setting	Description	Example
	edit each groups schedule.	
Attendance Rule	Determines how check-in will work if the person is not already in the group.	Add on Check-in (adds the person to the group if they are not already in the group), Already Belongs (the individual must already belong to the group)
Group Attendance Requires Location	This option will require that all attendance occurrences have a location.	True/False
Group Attendance Requires Schedule	This option will require that all attendance occurrences have a schedule.	True/False

Advanced Group Type Settings

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

Setting	Description	Example
Purpose	The purpose helps categorize different group types together. This allows you the flexibility of creating multiple group types but at the same time providing a way of 'linking' these various types together with a single 'purpose'. To add a new purpose simply add a new *Defined Value* under `Admin Tools > General Settings Defined Values > Group Type Purpose`.	While we recommend that you start with a single group type to manage your various serving teams you could over time add new ones. You would then create a purpose to descibe them all as serving opportunities.
Group Type Attributes	Custom attributes that will be shared by every group of this type. In other words every group of this type will have the same value of these attributes.	Group Type Attributes are used by the check-in system. Most group types won't have a need for them.
Attendance Prints To	Determines the device / location where check-in labels will be printed. The options are: ● Default - Uses the print location configured in the check-in workflow. ● Kiosk - Overides the check-in workflow to always print at the check-in kiosk.	This setting will have limited value outside of configuring check-ins.

Setting	Description	Example
	• Location - Overrides the check-in workflow to always print at the location configured in the group.	
Inherited Group Type	This allows you to create a group that inherits its attributes from another group type. This is helpful when you have two group types that are very similar but one needs a few more attributes.	Say you have a *Serving Team* group type that covers most of your serving groups. Your worship teams, however, would like to add a special attribute for *Instruments Played*. You want this new group type to have all of the same attributes of the current *Serving Team*. To solve this, add the *Serving Team* group type as the *Inherited Group Type* of the new *Worship Serving Team* group type.
Show Connection Status	This allows you to show a person's connection status in a column on group member lists.	This comes in handy for trying to understand a person's connection to your organisation at a glance.
Show Marital Status	This allows you to show a person's marital status in a column on group member lists.	This comes in handy for quickly viewing a person's marital status.

Group Member Roles

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

> **Family Roles**
> As noted above, roles are defined on the group type. While we encourage you to add roles as needed in general, we recommend against adding new roles to Family group types. Using values other than “Adult” or “Child” may cause issues with certain system processes, such as determining Age Classification.

Securing Groups

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

Securing Group Types

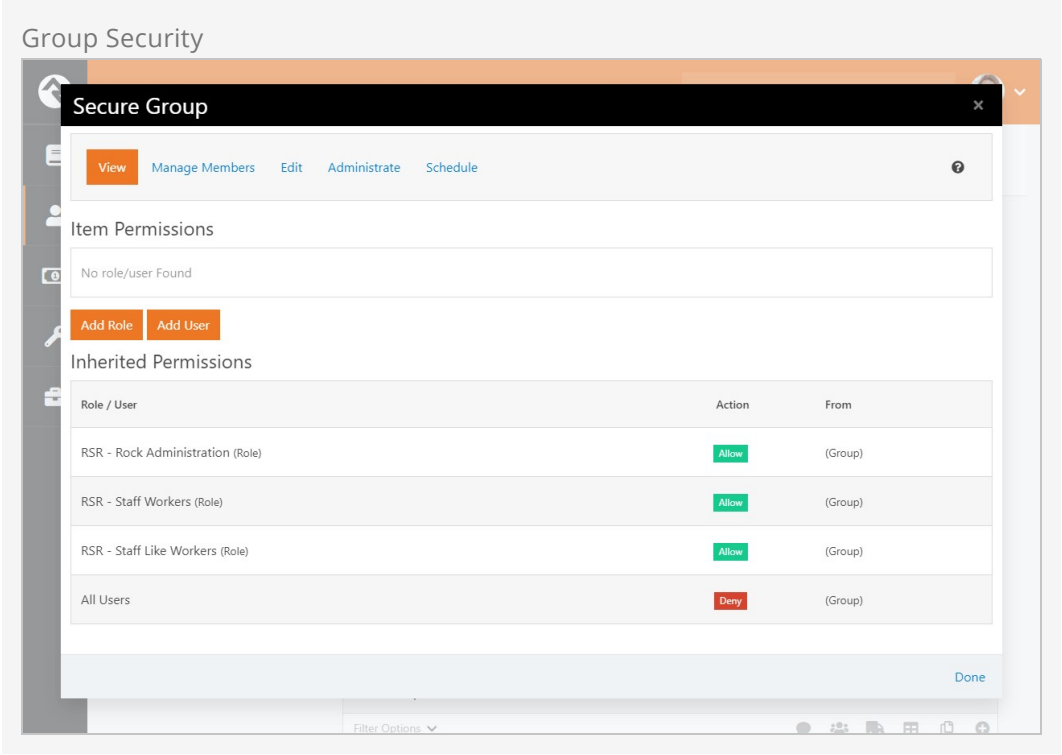
By adding security to a group type, you control the base security of every group of that type. Let's say your organization adds a new type of group to help manage some classes you're starting. You may want to create a new group type for this initiative where every class is a group of this new type. By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

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

Securing A Group

There may be occasions where each group will need different security settings. Don't worry, this is super easy in Rock. To secure a specific group, find the group in the group viewer (`People > Group Viewer`). On the group details page you'll find the same 🔒 button. Clicking this button will bring up the Rock security dialog where you can adjust the security settings.

Groups have a special *Manage Members* security tab. Anyone with *Manage Members* security can add, edit and delete group members, but they can't edit or delete the group itself. If no permissions are listed under *Manage Members* it doesn't mean that members can't be managed. Anyone with *Edit* access has *Manage Members* access by default. Also, group Leaders can manage members even if no *Manage Members* permissions are set or if they don't have *Edit* permission.



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

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

Group Member Roles

Group member roles play an important role in how groups are secured. Each role can be configured to provide *View* and / or *Edit* rights. This is configured under `Admin Tools > General Settings > Group Types`.

Inherited Permissions

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

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

The primary inheritance rules come from the group’s hierarchy but the system has a

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

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

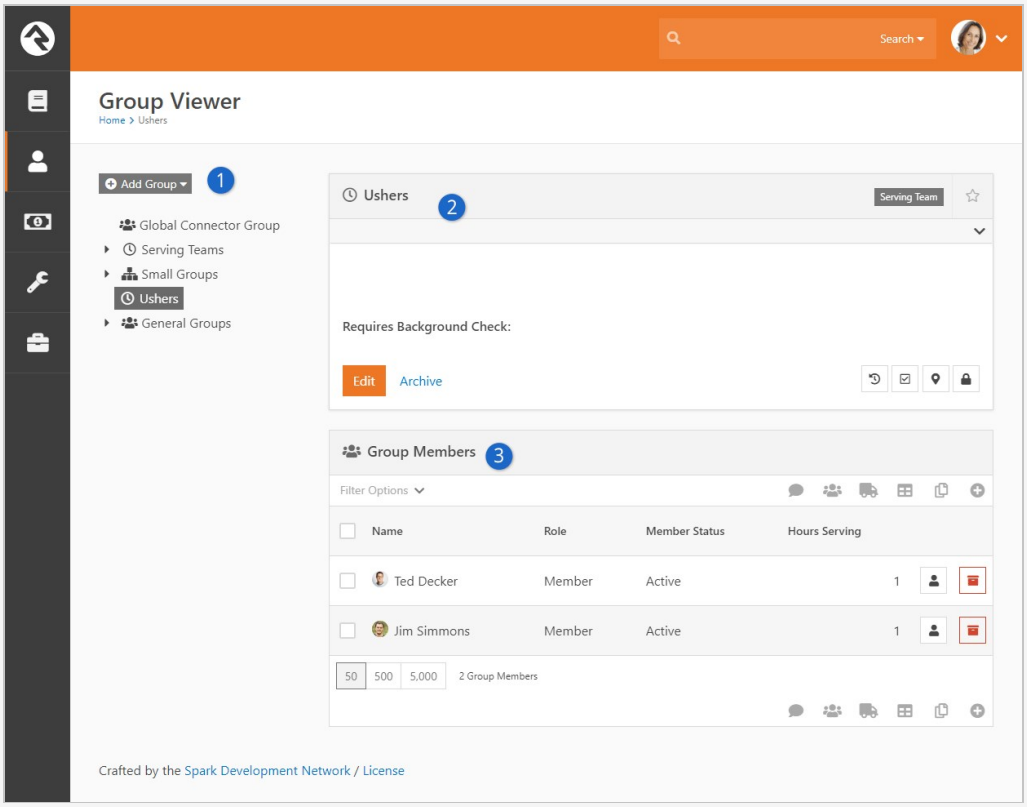
Group Strategies

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

Multiple Group Viewers

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

Group Viewer Blocks



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

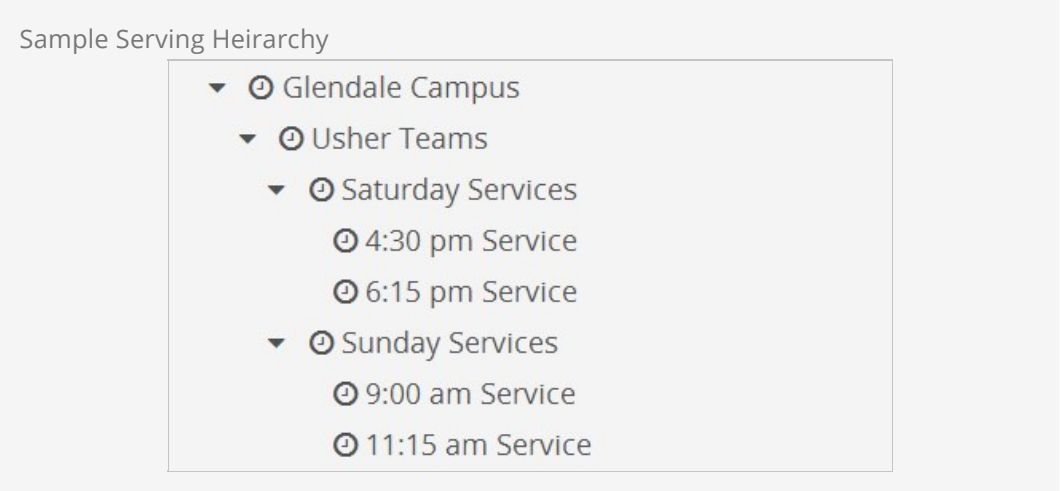
1. **Group Tree View**
   Add a group tree view block to the sidebar zone to help you navigate your group heirarchy.
2. **Group Details**
   Add the group details block to the top of the main zone.
3. **Group Member List**
   Next add the group member list block under the group details.

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

Group Folders

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

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



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

Group Schedules

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

Types of Group Schedules

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

Weekly

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

Custom

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

Named

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

Schedule Exclusions

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

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

Group Attendance

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

Configuring a Group for Attendance

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

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

- **Group Schedule Options:** While a group schedule is not required to take attendance, having a schedule will simplify the attendance entry because it will guide the user to enter attendance on those dates when the group meets.

- **Schedule Exclusions:** While each group can set its own schedule (including exclusion dates) you may want to set exclusion dates for every group of this type. This is especially helpful when using the simple schedule option where you only specify the day of the week and start time for a group. Adding these group type schedule exclusions help to keep email attendance reminders from being sent.

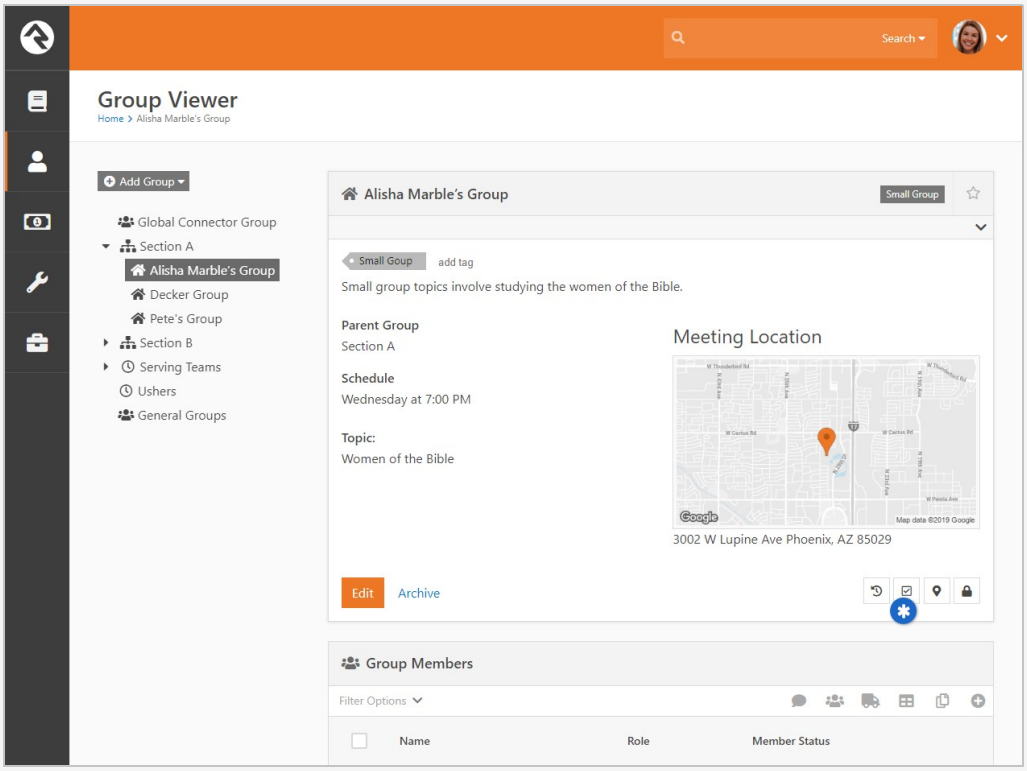
- **Send Attendance Reminder:** This checkbox will enable the sending of an attendance reminder email to the group leader the day the group is scheduled to meet.

Entering Attendance Information

Internal Attendance Features

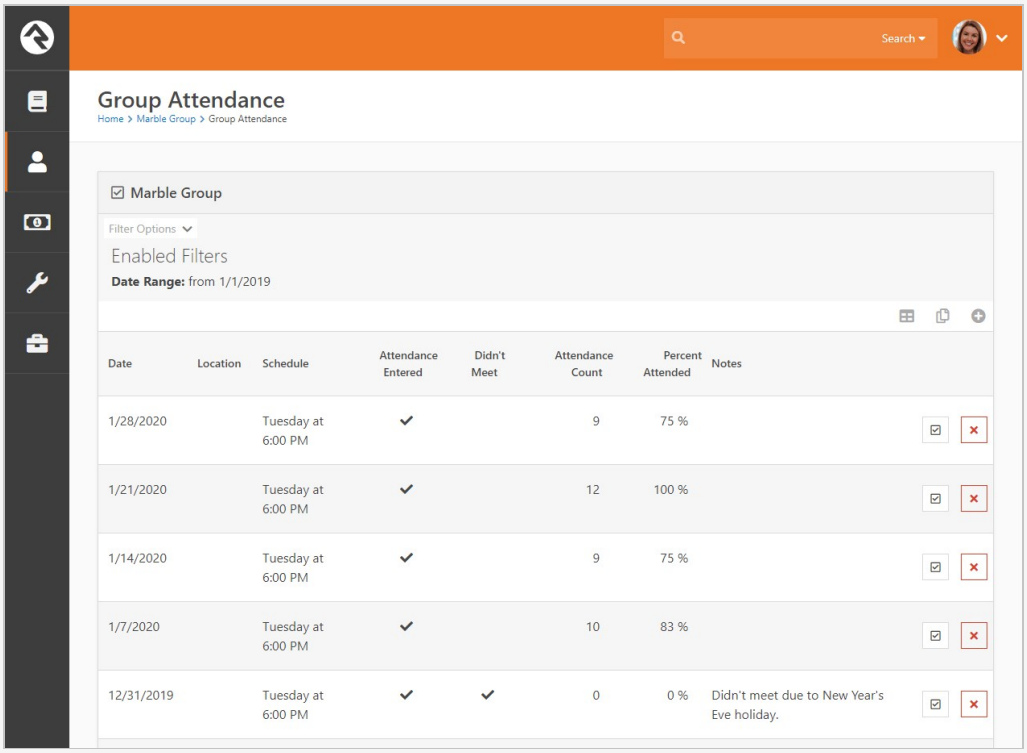
There are several ways to collect group attendance. The first is to use the internal attendance features built into the group viewer under `People > Group Viewer`. You'll notice an attendance button on the group details block for groups that are configured to take attendance.

Group Attendance Button



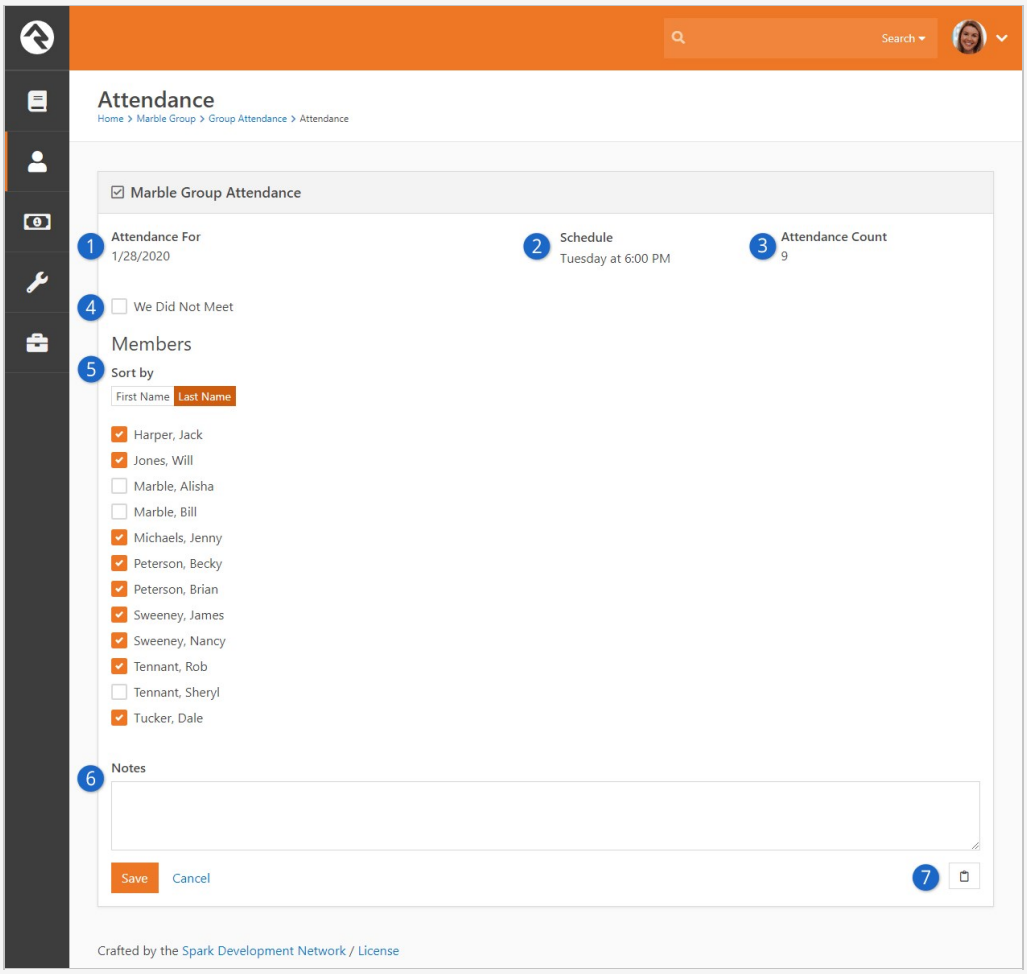
Selecting this option will bring up the group attendance grid. This grid lists the previously entered attendance for the group and allows you to enter new attendance records from the add button in the grid's footer.

Attendance List



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

Attendance Entry



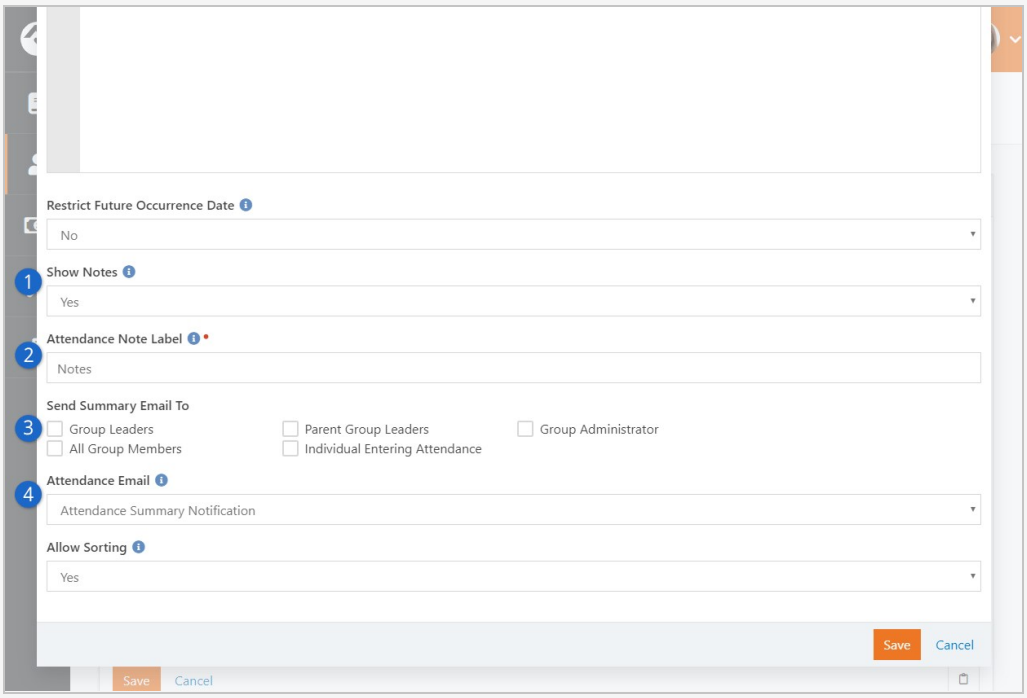
1. **Attendance For**
   The date for which attendance is being recorded.
2. **Schedule**
   If a schedule exists for this group, it will be shown here.
3. **Attendance Count**
   After attendance has been entered, the count of attendees is displayed.
4. **We Did Not Meet**
   Select this checkbox if there was no attendance because the group did not meet. This distinction is helpful for record-keeping, but also impacts areas like Streaks.
5. **Members**
   Attendance is tracked by checking the boxes next to the names of those who attended. The list of group members can be sorted by either first or last name.

6 **Notes**
If enabled in the block settings, notes can be added here. Notes will appear in the Attendance Summary Notification email if you are using that feature. The label “Notes” can be customized in the block settings.

7 **Print Attendance Roster**
Click the button to generate a printer-friendly version of the attendance page.

A Rock administrator can update the attendance entry block's settings to enable an automated *Attendance Summary* notification. This notification includes attendance details for the occurrence, any notes that exist and who entered the attendance.

Attendance Entry Block Settings



1. **Show Notes**
   The notes field, pictured in the prior screenshot above, can be disabled using this setting.
2. **Attendance Note Label**
   You can customize the label that appears above the text entry box on the page.
3. **Send Summary Email To**
   A summary of attendance data and Notes (if any exist) will be sent to the selected individuals via email. If none of the boxes are checked the email won't be sent.
4. **Attendance Email**
   Use this field to pick which *System Email* to use for sending the attendance summary. The "Attendance Summary Notification" ships with Rock for this purpose.

> ### Group Attendance Digest
> The *Attendance Email* described above isn't your only option for sending attendance information to those who need it. Check out the Group Attendance Digest section below to see if it's a good fit for your groups.

External Attendance Features

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

Toolbox chapter for details on this set of tools.

Rapid Attendance Entry

The Rapid Attendance Entry method of recording attendance may come in handy for your groups. To learn more, see the Rapid Attendance Entry chapter of the `Checking-out Check-in` manual.

Attendance Reminders

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

There are two other key configuration points for attendance reminders.

The first is the system communication that is used as the template for the reminder. This template can be edited by navigating to `Admin Tools > Communications > System Communications > Group Attendance Reminder`. See our `Communicating With Rock` guide for more information. If the template is configured for both email and SMS, and if your system is set up to send emails and text messages, then the reminder can use either medium. Group leaders will receive either an email or a text, depending on how the job is set up.

The other configuration point is the job that is run to send the communications on a daily basis. This job must be created for every group type that requires reminders. For more information on this job see the `Service Jobs Relating To Groups` section below.

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

Group Attendance Digest

Earlier in this chapter we looked at the Attendance Email you can configure to send attendance summary information to selected people. As you can see below, the *Group Attendance Digest* is similar, but there some important differences you should know about.

Example Group Attendance Digest Email

Below is the attendance summary for groups that meet from 6/1/2020 - 6/7/2020.

Please review each note and reply to the group leader if needed.

Small Group Name	Meeting Date	Attendance	Notes	
Group #3 (Saturdays @ 2:00 PM)	6/6/2020	3/3	Perfect attendance!	Email Leader

Contact Info:

3120 W Cholla St Phoenix, AZ 85029

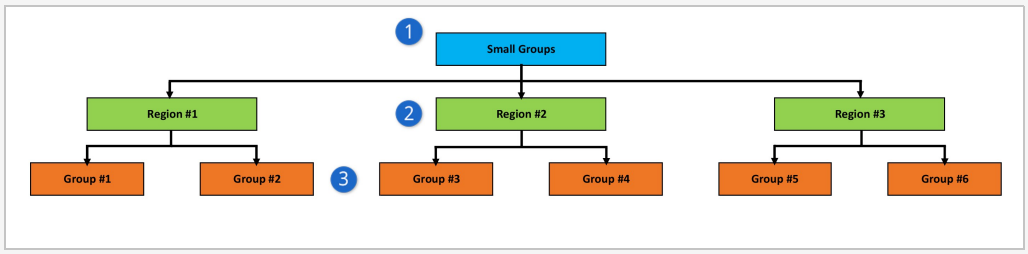
Phone: (555) 555-5555

Email: info@rocksolidchurchdemo.com

Website: http://www.rocksolidchurchdemo.com

The Group Attendance Digest may not be the right fit for all of your groups. It's only intended for a specific type of groups structure that we'll describe below.

Group Structure for Attendance Digest



1. **Parent Group**
   This is the Parent Group for all of the other groups below it. This group will be added to the Send Group Attendance Digest job configuration, which we'll talk about in the Service Jobs chapter below.

2. **Region or Area**
   Individuals in these groups who have a group role that's configured as *Is Leader* will receive a digest email for the associated child groups. If these groups have multiple *Leaders* then each will receive their own email individually.

3. **Attendance Group**
   These are the small groups where attendance is being recorded. The attendance in these groups will be emailed to the *Leaders* of their respective parent groups. For instance, the attendance in 'Group #3' and 'Group #4' will be emailed to the *Leaders* in 'Region #2'.

   The *Leader* of the attendance group will be contacted when the 'Email Leader' link is clicked from the Attendance Digest email as shown in the prior screenshot above.

The chart above has three "Regions" with two "Groups" below each region. But you're not limited to those numbers. You can have only one region with five child groups below it, or ten regions with a single child group each. The only requirement is that you need all three hierarchical levels, with a single parent group at the very top.

See the Service Jobs Relating to Groups chapter for information on setting up the Send Group Attendance Digest job.

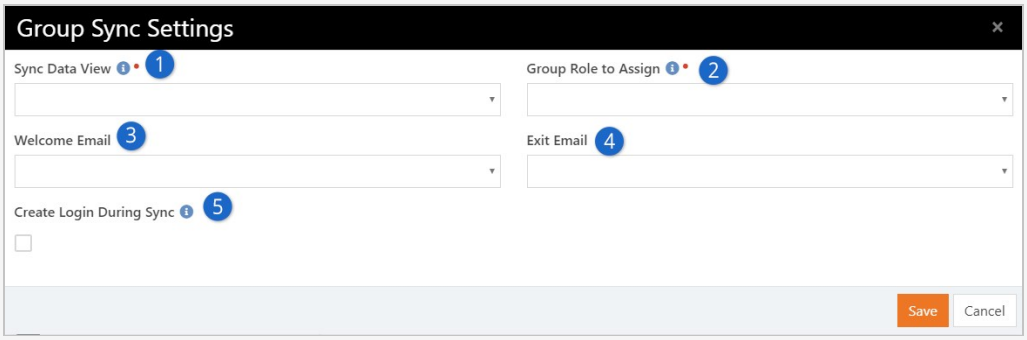
Group Sync

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

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

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

Group Sync Settings



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

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

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

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

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

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

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

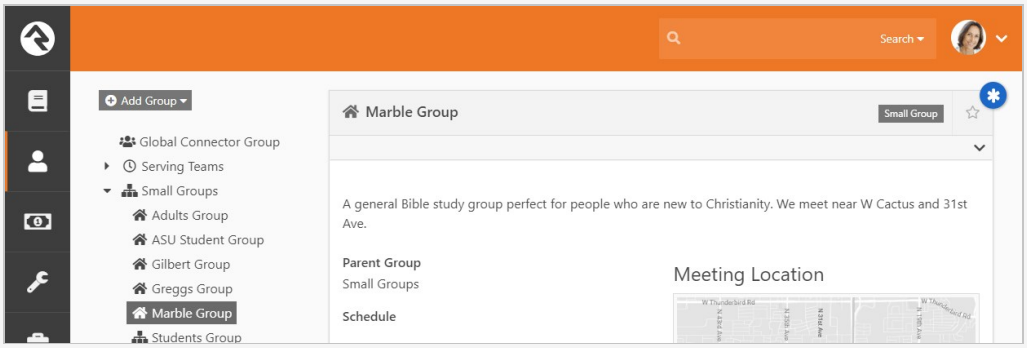
Group Following

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

How To Follow

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

Following A Group



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

Group Members

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

Group Member Roles

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

- **Is Leader:** Determines if the individuals in this role are considered leaders within the group. This option enables additional functionality within Rock.

- **Can View:** This gives the members of this role the ability to view the group information in various group toolbox blocks.

- **Can Edit:** Allows members to edit group information in various group toolbox blocks.

- **Minimum Required:** Rock allows you to have rules on how many individuals can have certain roles. This setting configures the minimum number of individuals who must have this role. This will keep you from deleting a group member if the deletion will drop the number of individuals with this role below the minimum.

- **Maximum Allowed:** This setting is like the minimum but limits the number of people who are allowed this role. For instance, you might configure a group type to only allow one person to be the leader. You can also use this option to limit the number of adults in a family. A family is a group type.

- **Default:** When someone is added to a group, this will be the default role they'll be assigned to. Note: Some blocks will have a block setting that overrides this default. This setting will handle cases when a block does not provide an overriding setting.

Group Member Status

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

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

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

- **Pending:** The individual has not yet fully joined the group.

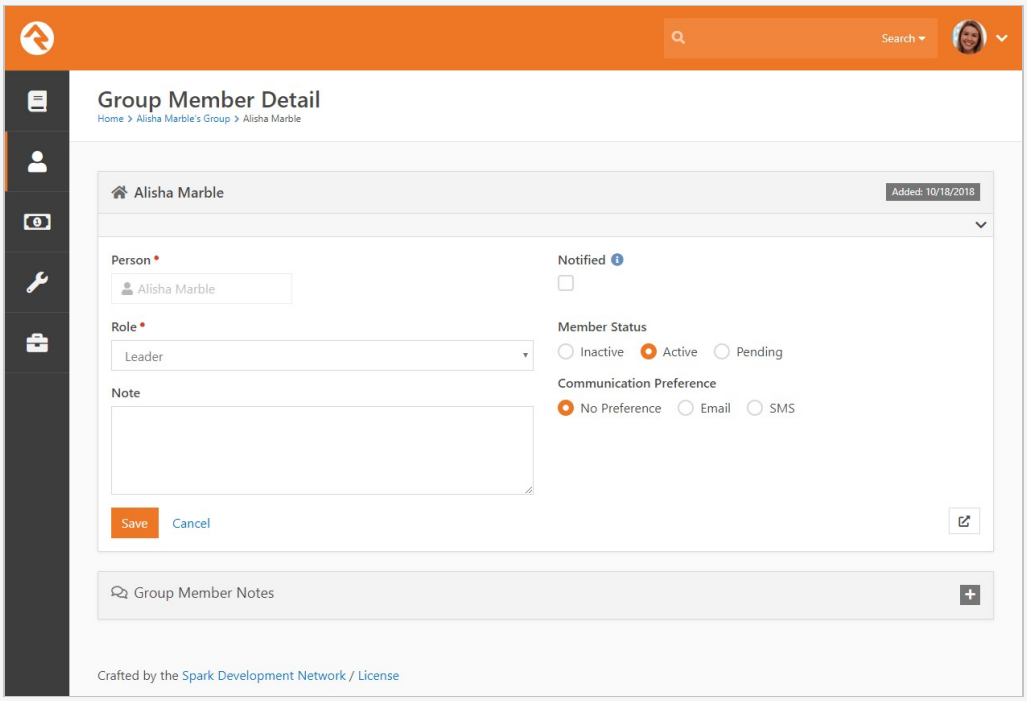
Group Member Attributes

Group members can also have attributes. This allows you to track custom data points for each person as it relates to their membership in the group. Usually these *Group Member Attributes* are defined on the *Group Type* under:
`Admin Tools > General Settings > Group Types`.
When they're configured here, the attributes will apply to every group member of this type. You can also add Group Member Attributes to a specific group under:
`People > Group Viewer > Group` if you have *Administrate* access to the group.

Editing a Group Member

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

Editing a Group Member



If a group member has a note attached, a small note icon will display on the group member list to help identify this fact.

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

> **Group Member Attributes**
> If the group member's current group and the destination group share group member attributes with the same key then those attributes will be retained. Otherwise, when the group member is moved the member's attribute information will be lost

Group Member Workflows

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

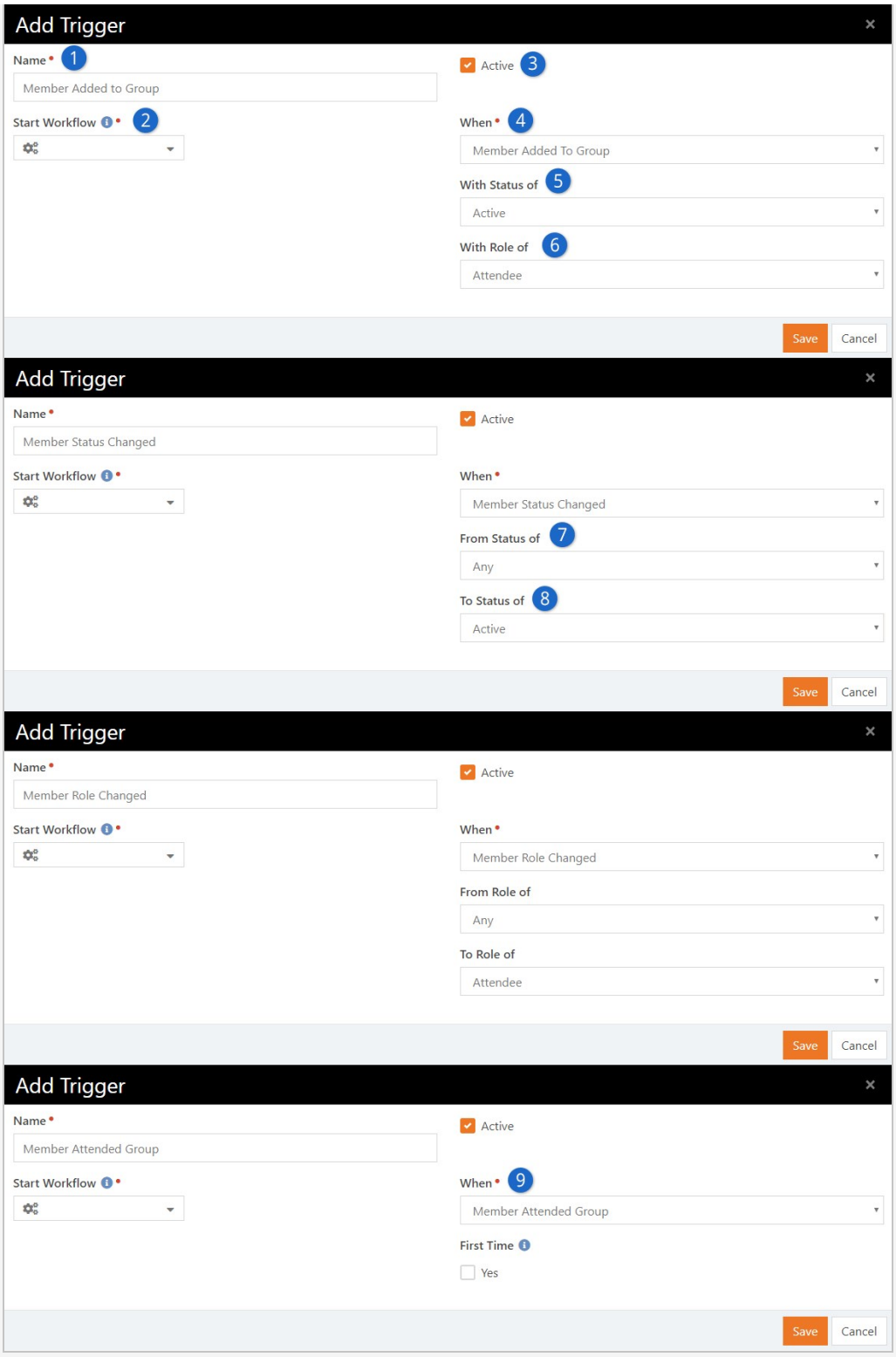
Group Member Workflows are an easy way to trigger workflows to launch when the state of a group member changes for a specific group. These events include:

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

The workflows you define for these triggers can be configured for all groups of a specific type under:
`Admin Tools > General Settings > Group Types` or for a specific group under `People > Group View > Group`.
Below is the screen you'll see in either case.

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

Group Member Workflow Settings



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

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

See our `Blasting Off With Workflows` guide for more information.

Tips For Creating Triggered Workflows

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

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

> **Be Persistent**
> Make sure the triggered workflow is *Automatically Persisted*. This will ensure it works correctly and as intended.

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

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

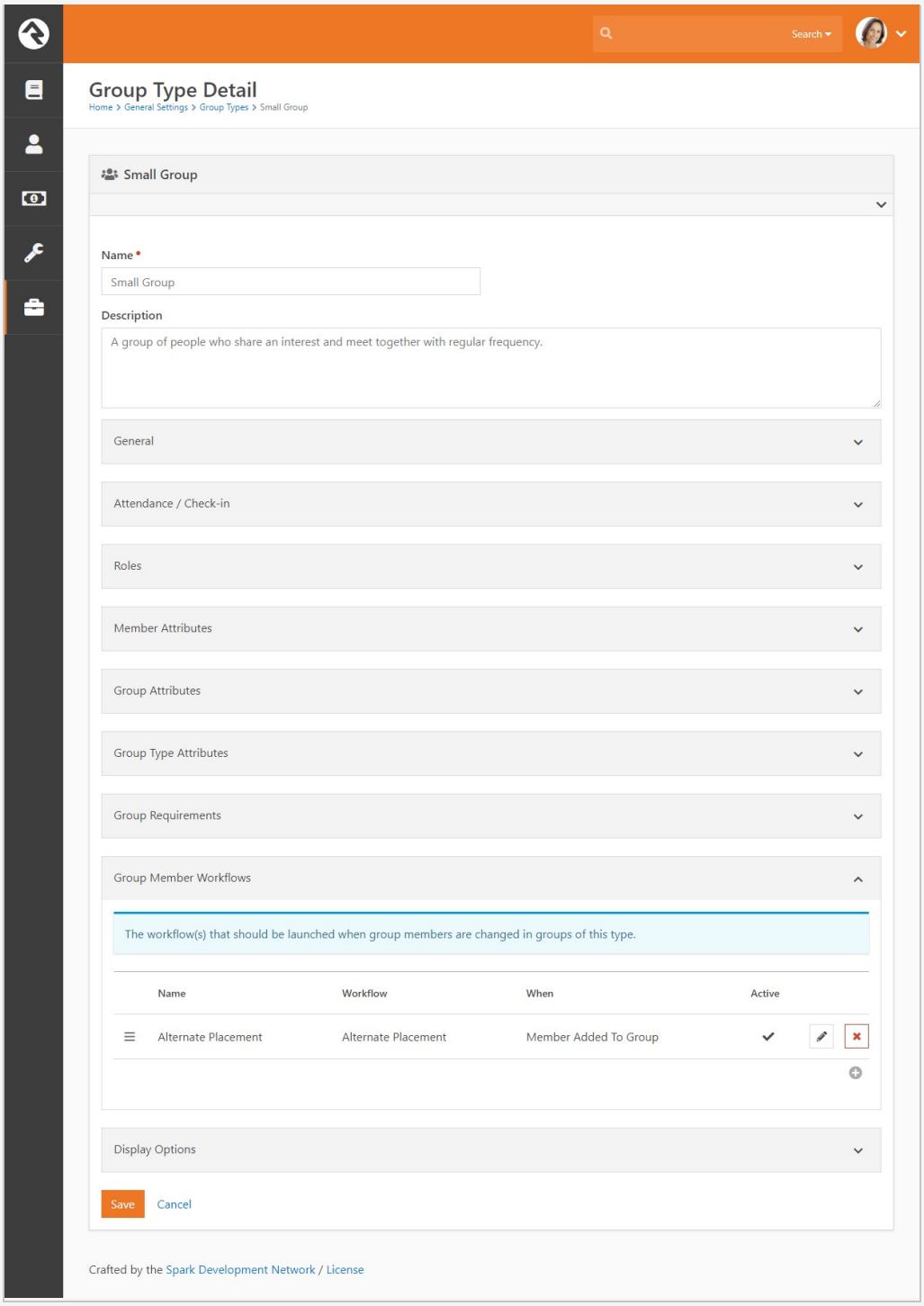
> **When Group Member Won't Be Passed:**
> Some member workflow triggers won't pass the group member as the entity. For instance, for the *Member Removed from Group* and *Alternate Placement* workflow types there won't be a group member left to pass when these events are launched.

Alternate Placements

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

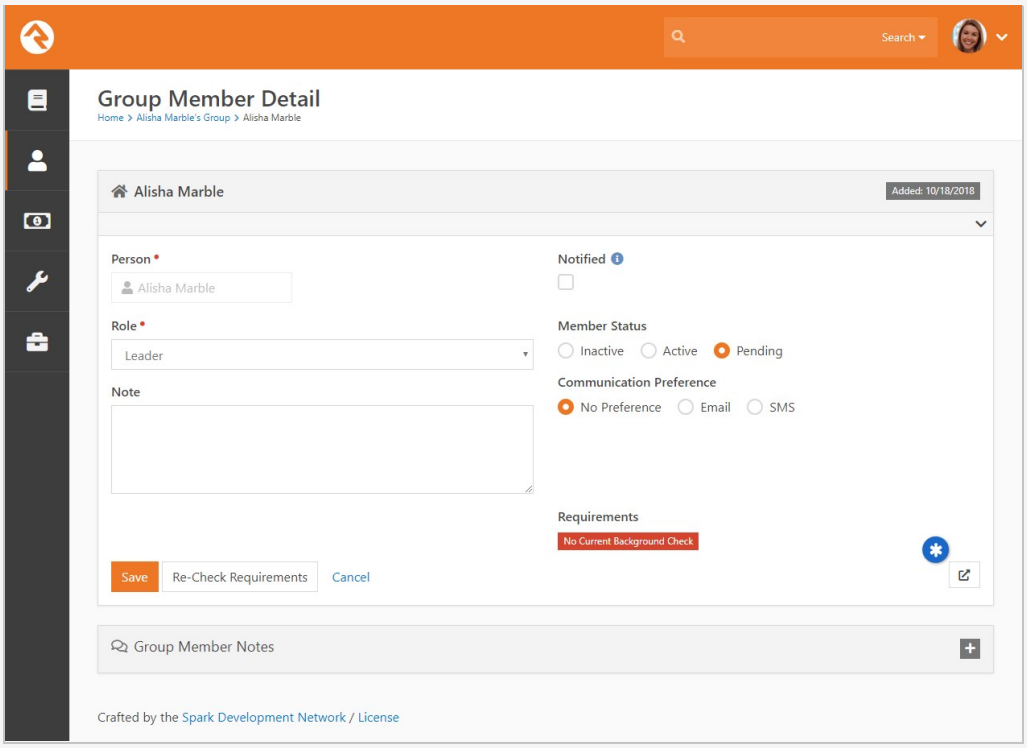
The first step is to configure the group type to have an alternate placement group member workflow. We discussed creating these workflows in the previous chapter. This member workflow type has two options: *Show Note* and *Note Required*. This allows the group leader to notate the reason why they are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

Configuring an Alternate Placement Workflow



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

Alternate Placement Button



Alternate Placement Note

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

Tips For Creating Triggered Workflows

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

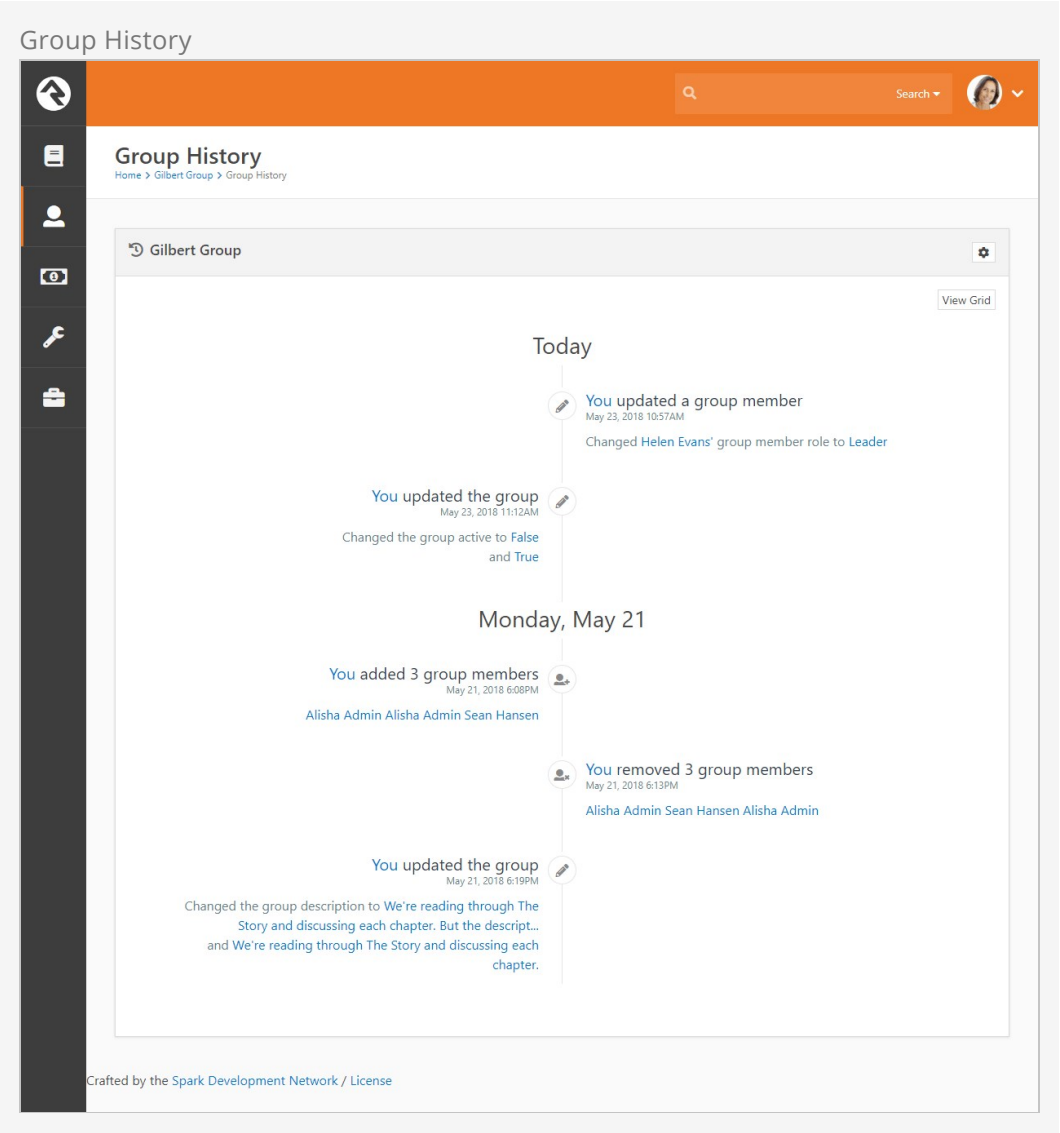
- **Person:** The person that the group member represents.
- **Group:** The group that the person is a member of.
- **Note:** The note that was entered by the group leader.
- **Group Member Status:** The status that the group member was when the workflow was launched.
- **Group Member Role:** The role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

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

Group History

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

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



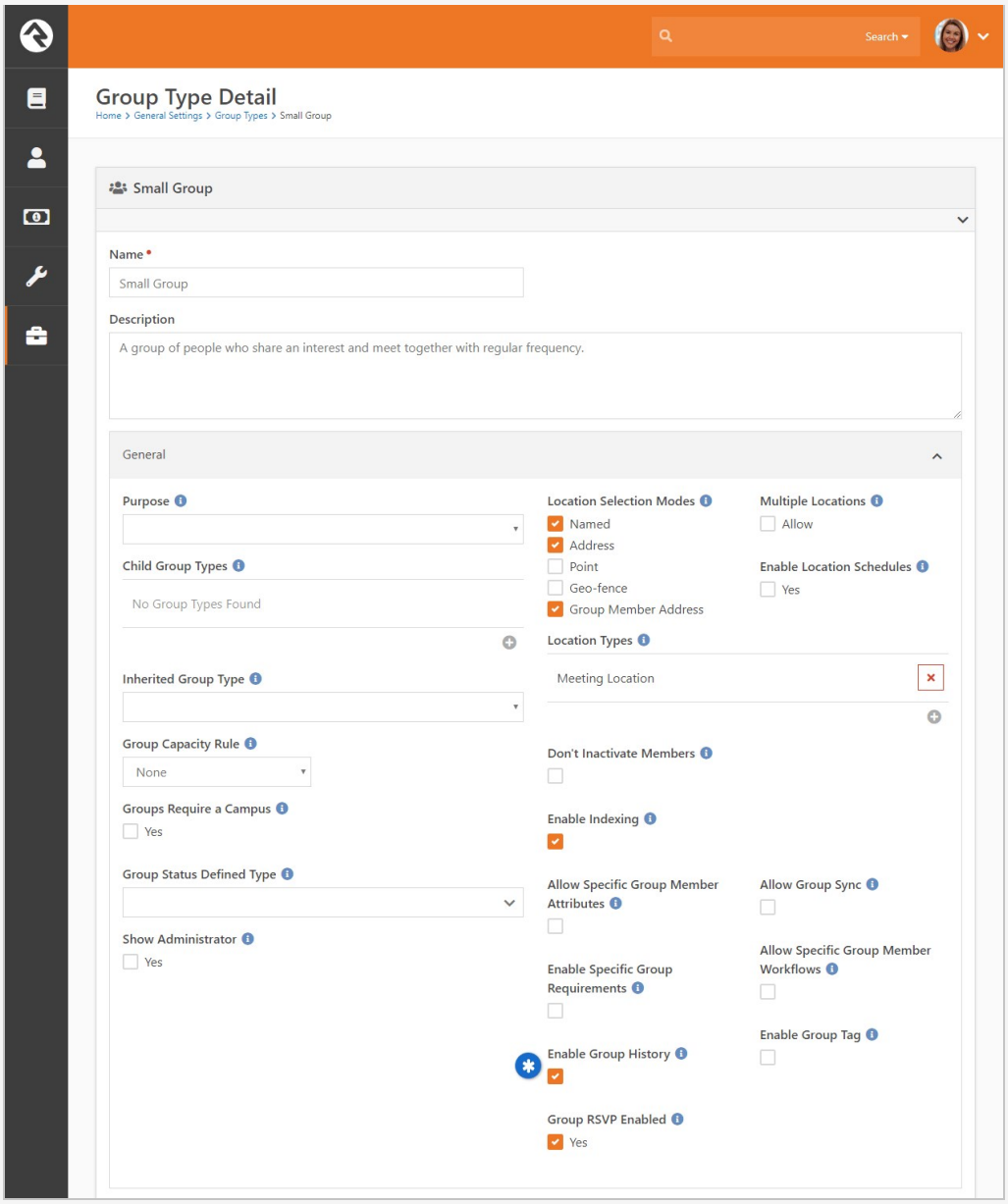
Rock ships with Group History enabled for small groups and serving groups. You can enable and disable Group History for any group type. However, because a lot of data can build up quickly, we recommend using it only with your more regular, stable groups. For example, enabling Group History for a Sunday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

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

Enable Group History

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

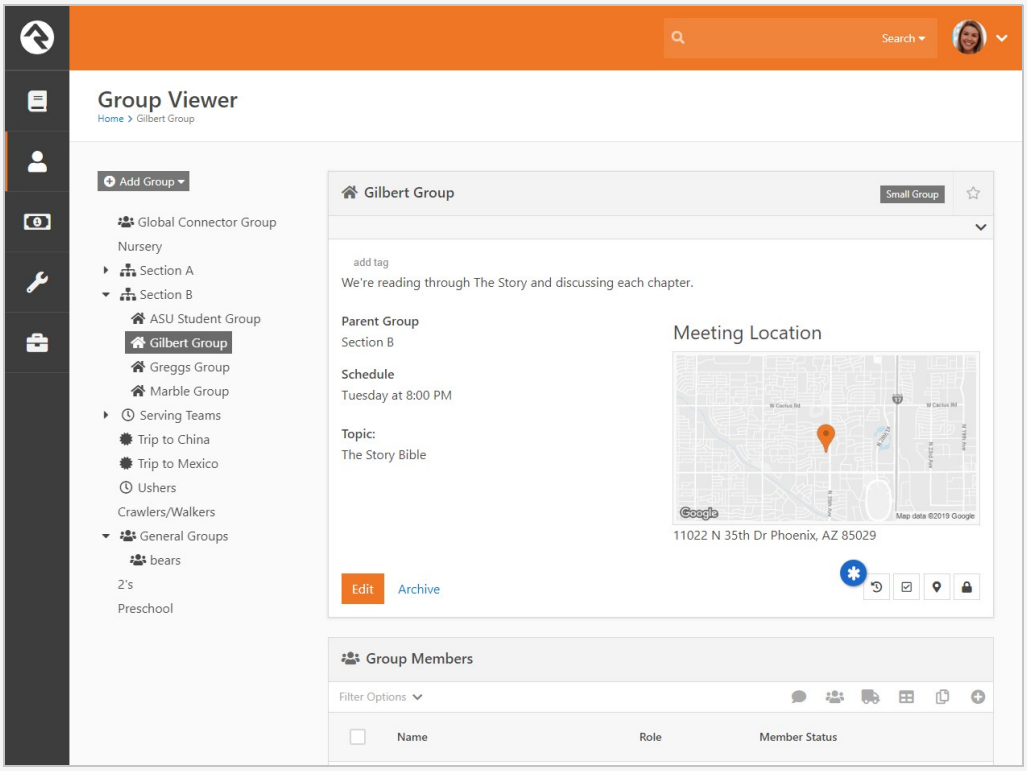
Enable Group History



View Group History

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

View Group History



Archived VS Delete:

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

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

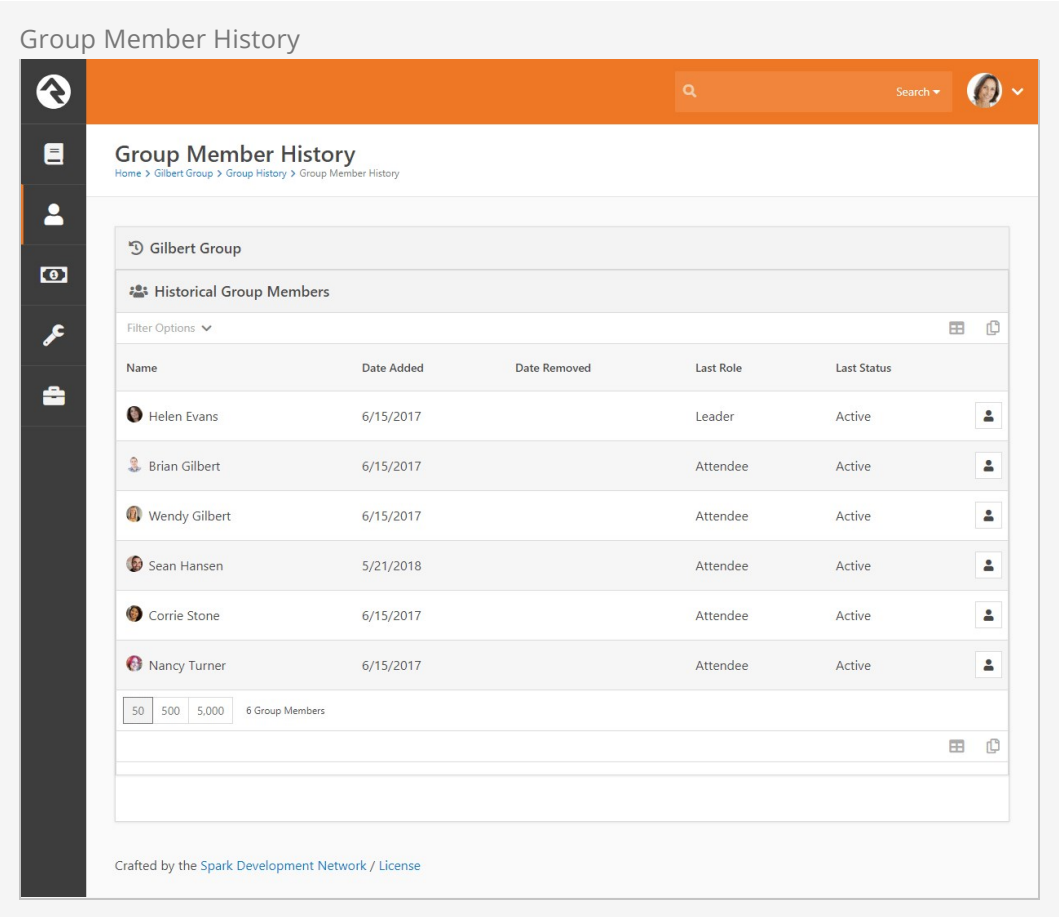
- - Member added
- - Member removed
- - Group edited
- - Other/general group action

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

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

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

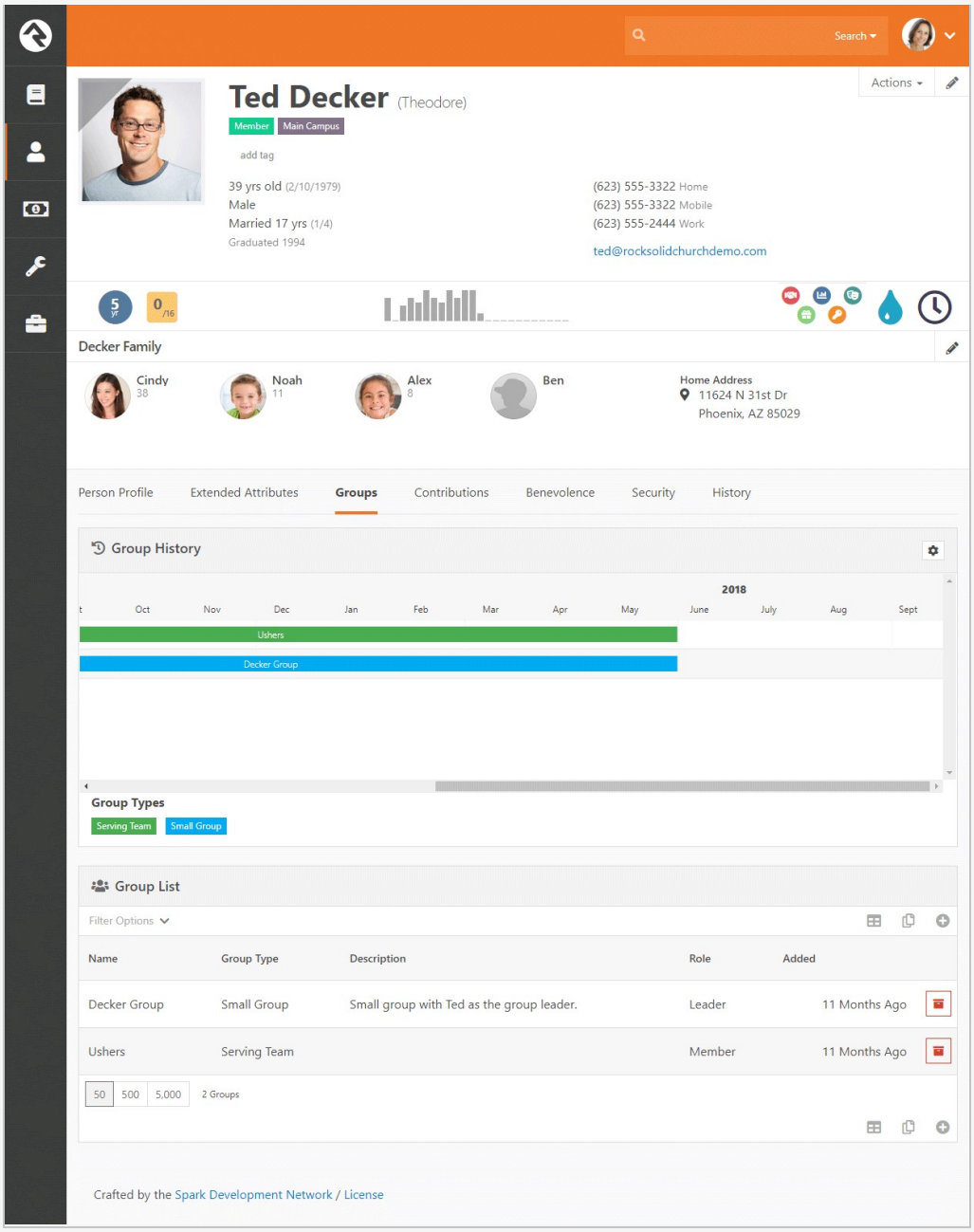
history/dates of their involvement in the group. Click on a specific person to view a timeline of their involvement with the group.



View Group History in a Person's Profile Page

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

Group History in Person Profile



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

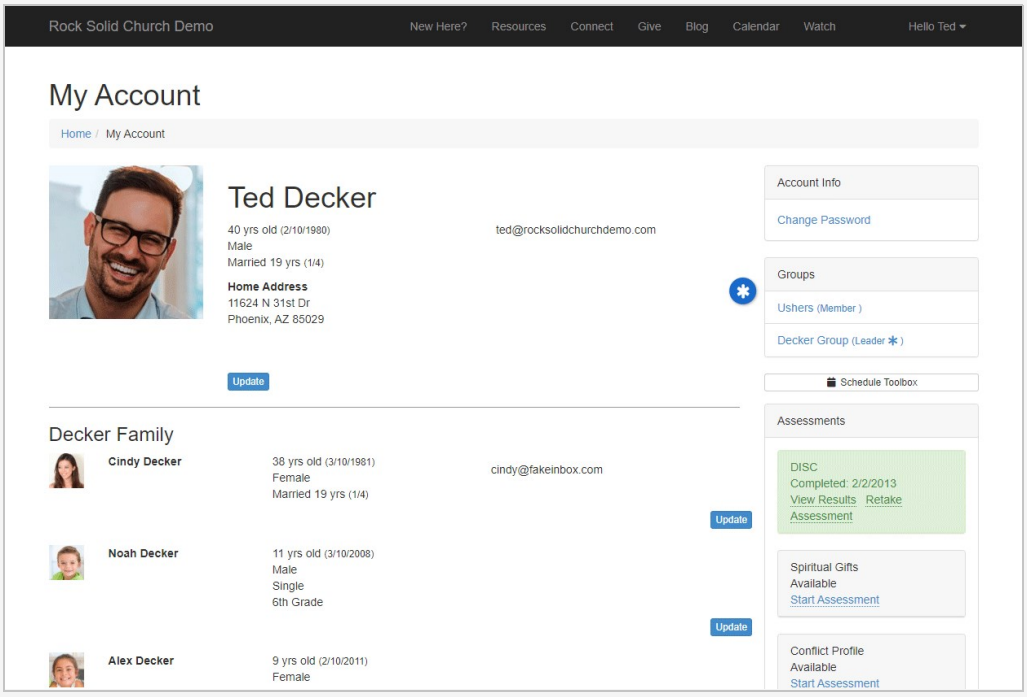
Group Leader Toolbox

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

My Account - Groups

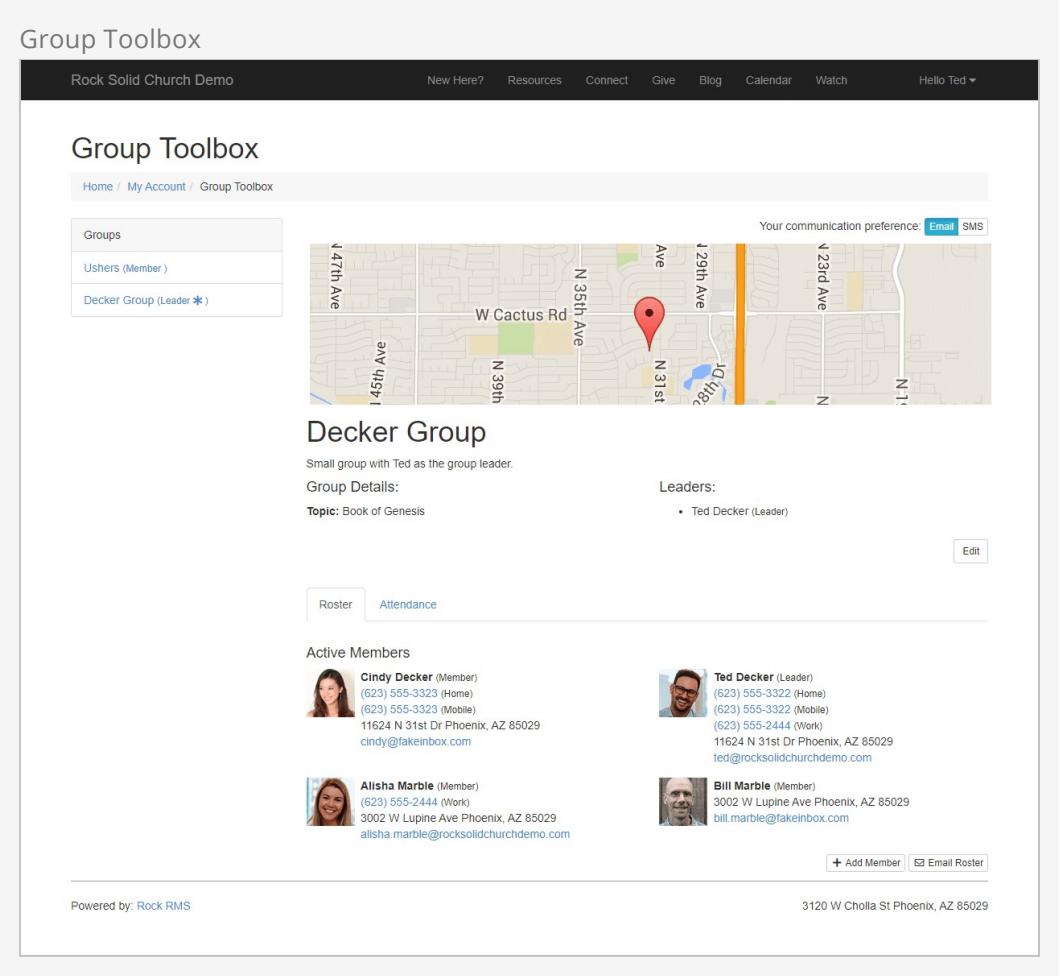
Along the right of the *My Account* page is a listing of groups to which the person belongs. The individual can also see their role within the group. Through block settings you can configure which group types to show or hide. Using Lava, you can adjust the look of this block to your heart's content.

Group List in My Account



Clicking on any group in which the person is a leader will open the group leader's toolbox.

Group Toolbox



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

> **Note on Security**
>
> When adding a person to the group the default view allows you to select the new individual from those already in the database. In order for this search to work you will need to adjust the security on the api/People/Search REST endpoint. You can find this under:
>
> `Admin Tools > Security > REST Controllers > People`.
>
> If you would prefer not to allow group leader to search the list of people in the database you can provide a alternate *Add Person* page in the block settings. On this new page you may choose to setup a workflow entry form, a group registration block or a simple email form.

Group Attendance List and Detail

Group Attendance List

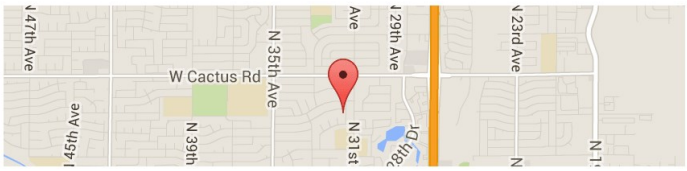
Rock Solid Church Demo | New Here? | Resources | Connect | Give | Blog | Calendar | Watch | Hello Bill

Group Attendance

Home / My Account / Group Toolbox / Group Attendance

Groups

- Decker Group (Member)
- Marble Group (Leader ✱)



Marble Group

A general Bible study group perfect for people who are new to Christianity. We meet near W Cactus and 31st Ave.

Group Details:

Topic: General Bible Study

Leaders:

- Bill Marble (Leader)

Edit

Roster | Attendance

Filter Options

Enabled Filters

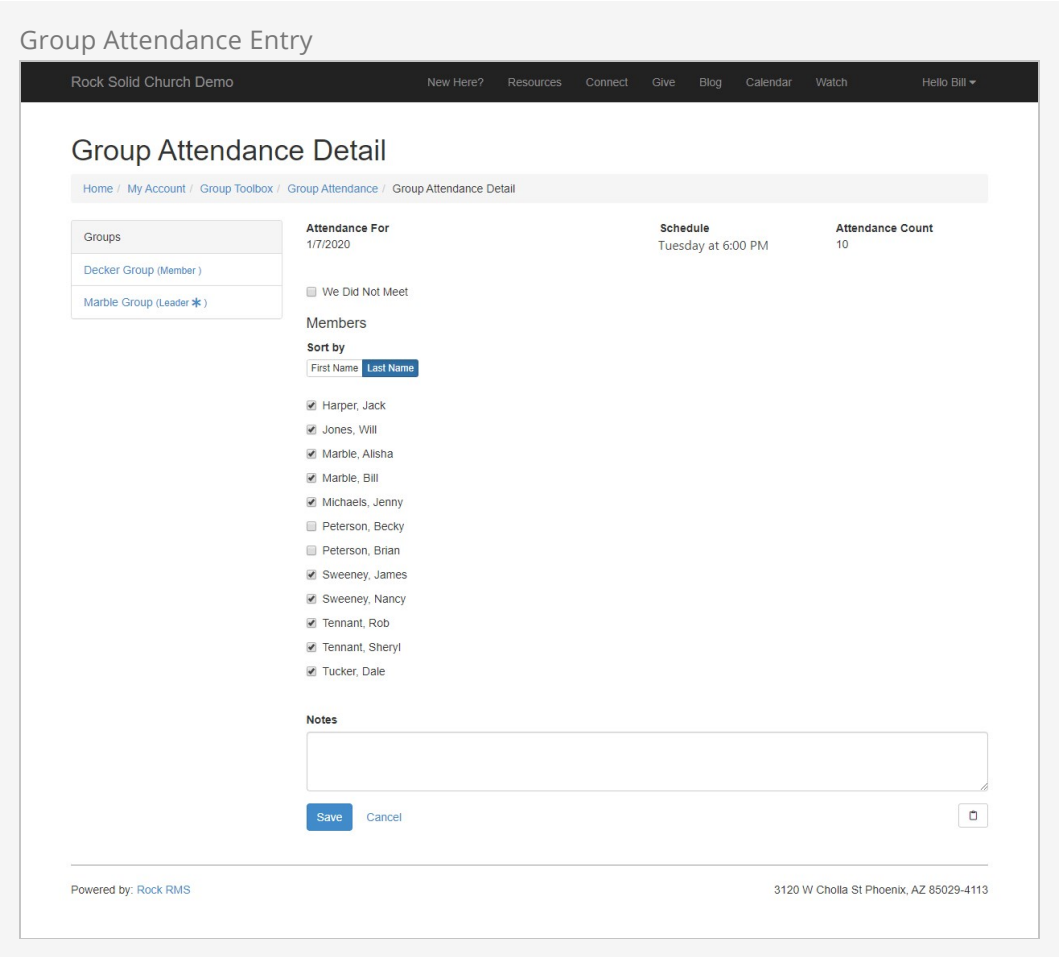
Date Range: 12/17/2019 to 2/4/2020

Date	Location	Schedule	Attendance Entered	Didn't Meet	Attendance Count	Percent Attended	Notes		
1/28/2020		Tuesday at 6:00 PM	✓		9	75 %			
1/21/2020		Tuesday at 6:00 PM	✓		12	100 %			
1/14/2020		Tuesday at 6:00 PM	✓		9	75 %			
1/7/2020		Tuesday at 6:00 PM	✓		10	83 %			
12/31/2019		Tuesday at 6:00 PM	✓	✓	0	0 %	Didn't meet due to New Year's Eve holiday.		
12/24/2019		Tuesday at 6:00 PM	✓		11	92 %			
12/17/2019		Tuesday at 6:00 PM		✓	0	0 %			

50 | 500 | 5,000 | 7 Occurrences

Powered by: Rock RMS

3120 W Cholla St Phoenix, AZ 85029-4113



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

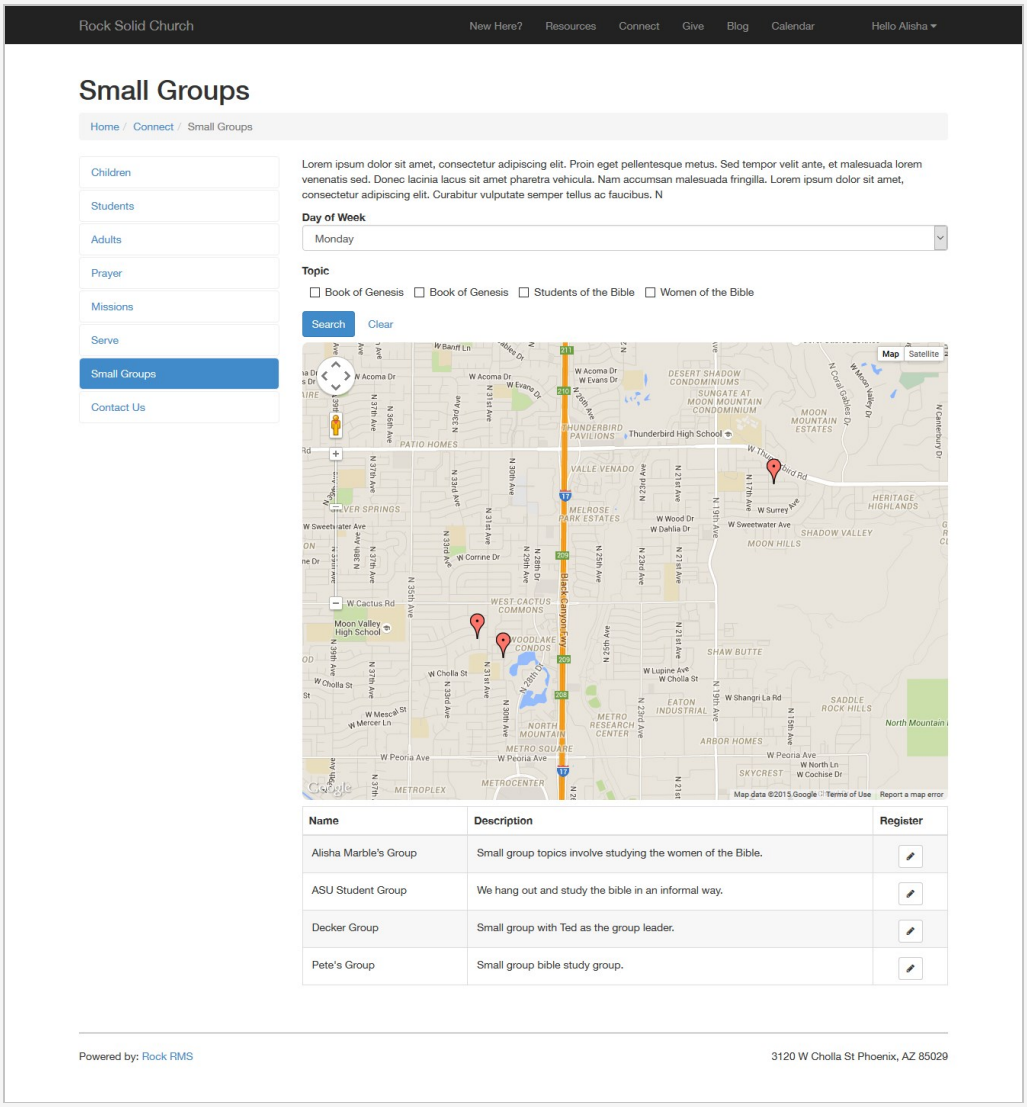
Group Finder

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

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

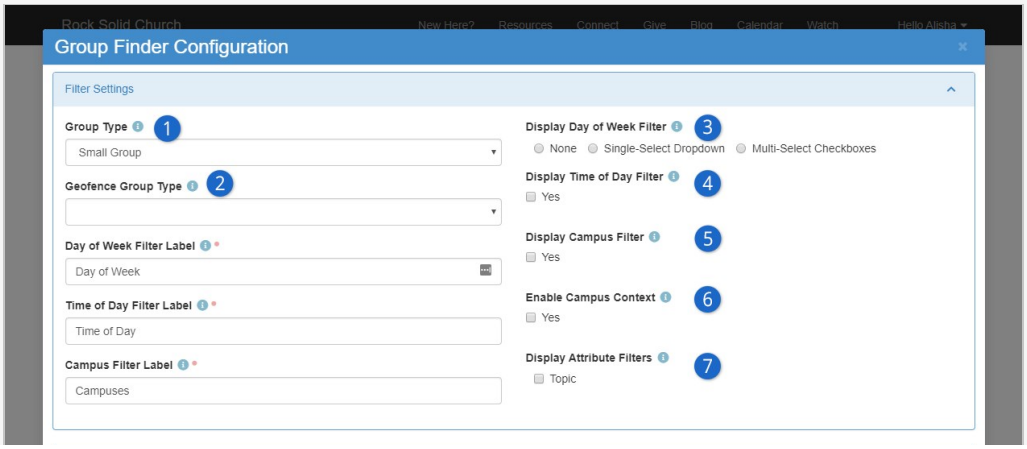
> **Public Groups**
> Only groups that are marked `Is Public` can be viewed in the group finder. You can change the public setting by editing the group.

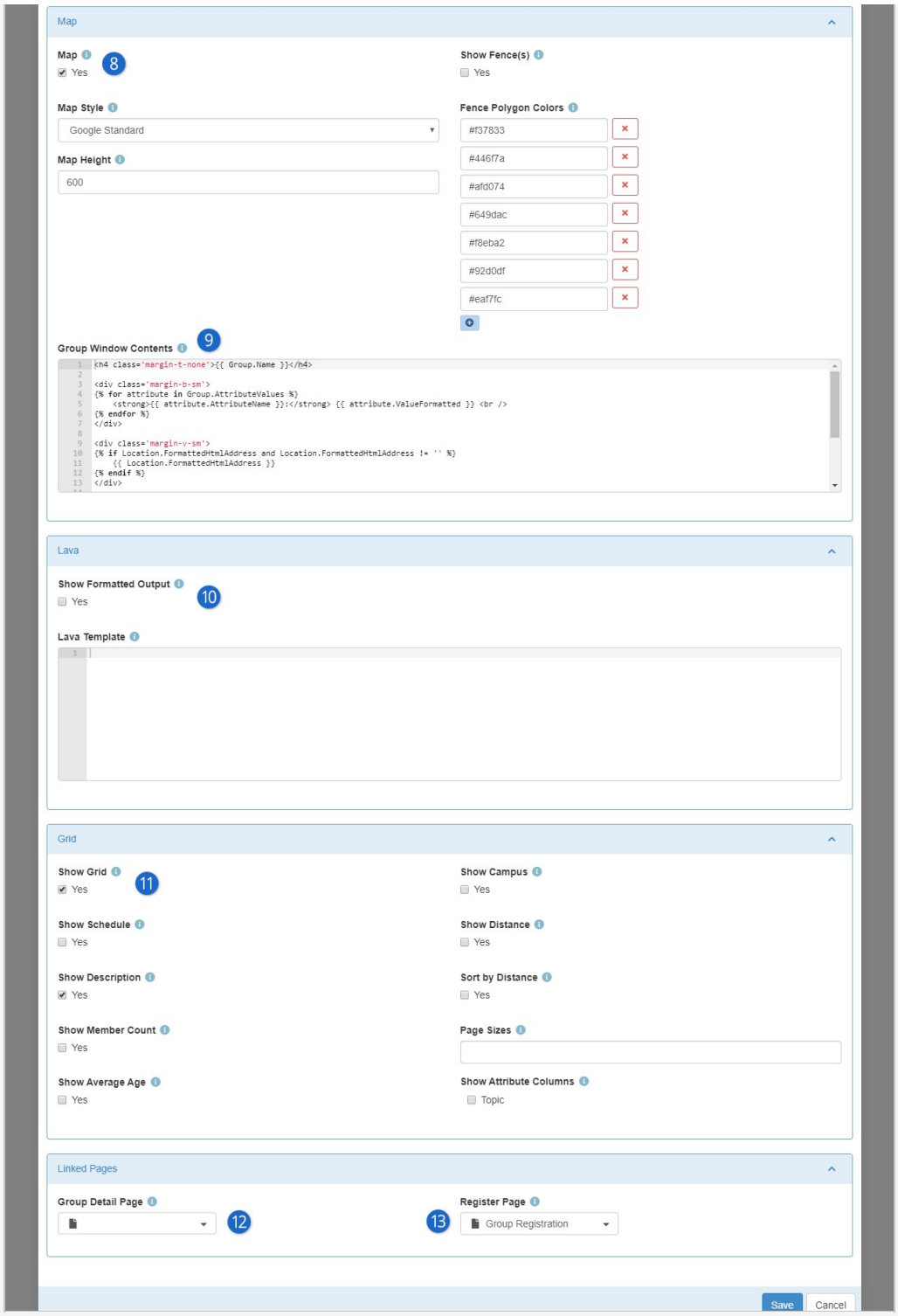
Group Finder



While this default configuration should work for many organizations, there are a number of ways you can alter the experience by modifying the settings of this block. Let's take a look at what's possible in the Block Settings:

Group Finder Block Settings





1 **Group Type**
Start by choosing the GroupTypes you would like to be available through the group finder

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

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

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

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

4. **Display Time of Day Filter**
   If your groups have a "weekly" type schedule, you can offer people the ability to filter for groups meeting at a specific time. They can choose `Greater Than` 5:00pm to find groups which meet in the evening, for instance.

5. **Display Campus Filter**
   Allows people to filter the list of groups according to the campus they belong to

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

7. **Display Attribute Filters**
   Allows you to choose which Group Attributes people can filter the list by

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

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

10. **Lava: Show Formatted Output**
    Allows you to configure your own output based on the groups matching the filters. If you enable both the Lava and grid the Lava results will be shown above the grid. Your Lava will have access to an array called Groups which you can loop through to display groups matching the filters. See our `Lava` documentation for more information.

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

12 **Linked Pages: Group Detail Page**
Specifies a page the person will be taken to if they ask for more details about a group. This page is available to your Lava using the LinkedPages.GroupDetailPage object

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

Another Way To Use the Group Finder

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

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

Group Registration

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

- **Mode:** There are three entry modes for the registration form.
  - **Simple:** This mode only asks for the individual's first name, last name and email address.
  - **Full:** This mode additionally asks for more contact information including home phone, cell phone and address.
  - **Full With Spouse:** This mode is identical to the normal *Full* mode but adds the spouse's first name, last name, cell phone and email.

- **Group Member Status:** This setting determines the group member status that will be used when they are added to the group. Options include Pending, Active or Inactive.

- **Connection Status:** The registration form will attempt to find a matching record in the database using the first name, last name and email. If a record cannot be found, a new record will be created in the database. When that occurs, this will be the connection status that is used for these new records.

- **Record Status:** This represents the record status that will be used for new records. It's best to leave this as *Pending* so individuals on your data integrity team can manually review them for possible duplicates and merge the records if

needed.

- **Workflow:** This option allows you to launch a workflow after the registration. The group member will be attached to the workflow as the Entity.

- **Lava Template:** This is a Lava template that will be applied to the top of the registration block. This allows you to customize the experience for the individual.

- **Result Lava Template:** This Lava template is used to craft a response message after the registration is completed.

- **Result Page:** You can optionally send the individual to a new page after the registration is processed.

Group Scheduling

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

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

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

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

Scheduling Tools

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

Overview

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

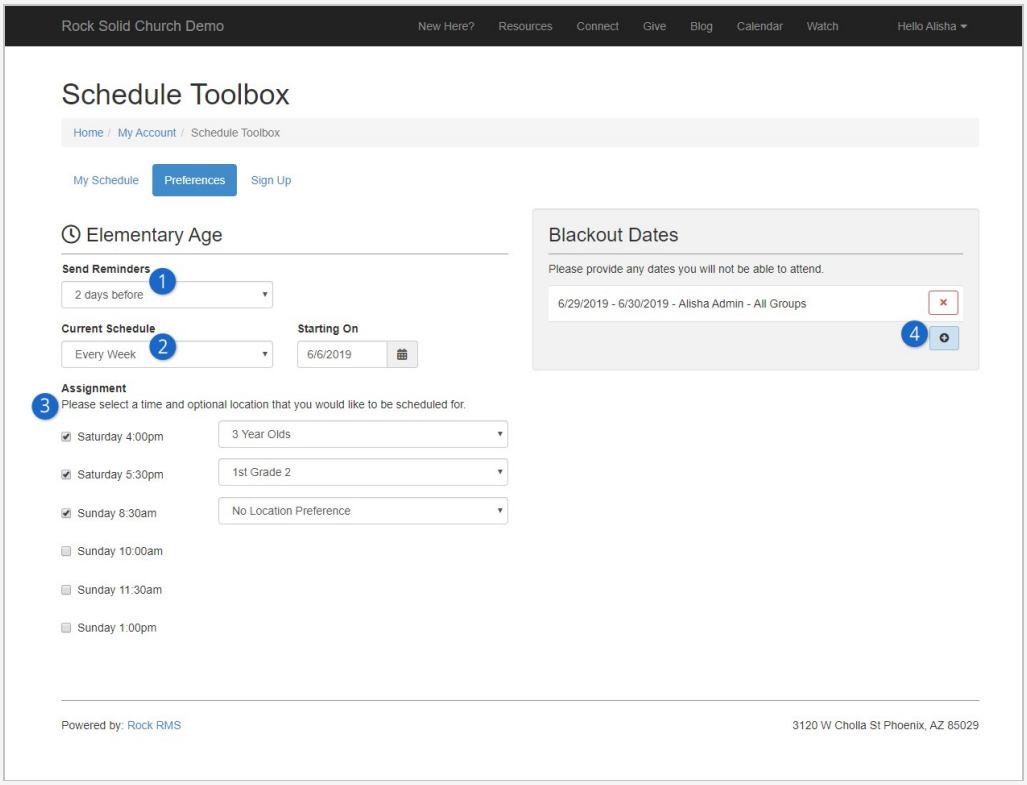
people will then be filtered based on those selections. Now you will drag and drop people names into the desired areas or use the auto tool. Make sense? If not, don't worry, we'll break each step down into detail.

Scheduling Toolbox

Let’s start with the power each person has. On the `Schedule Toolbox` on their My Account page they can:

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

External Schedule Toolbox



1 **Send Reminder**
How many days prior that a reminder email is sent about an upcoming schedule.

2 **Current Schedule**
The frequency someone is available to serve. Rock administrators can edit this list by navigating to `Admin Tools > General Settings > Group Member Schedule Templates`.

3 **Assignment**
Preferred times and locations. Time is required to choose a location. Location preferences are optional. If no location is selected, the auto scheduler will assign the person to the next available position at the preferred time.

3 **Blackout Dates**
Dates the person is not available to serve.

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

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

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

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

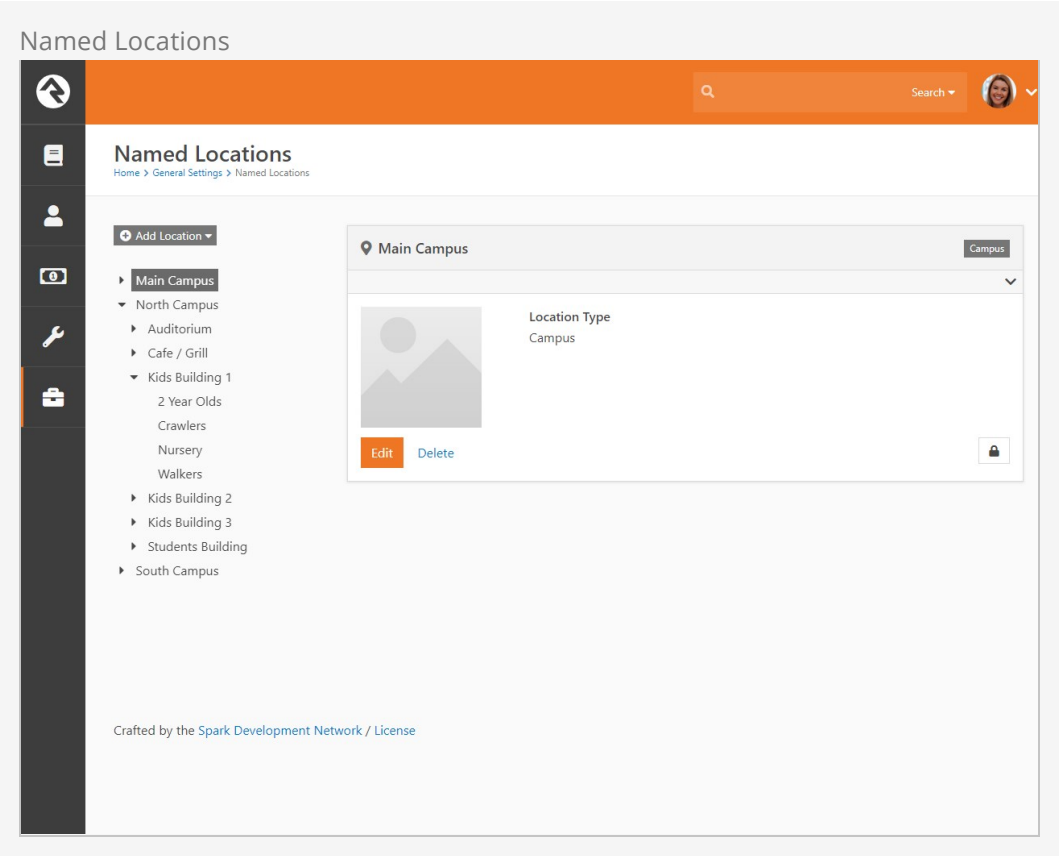
Let's take an in-depth look at each of these settings and how to configure it for your organization.

Configuring Group Scheduling

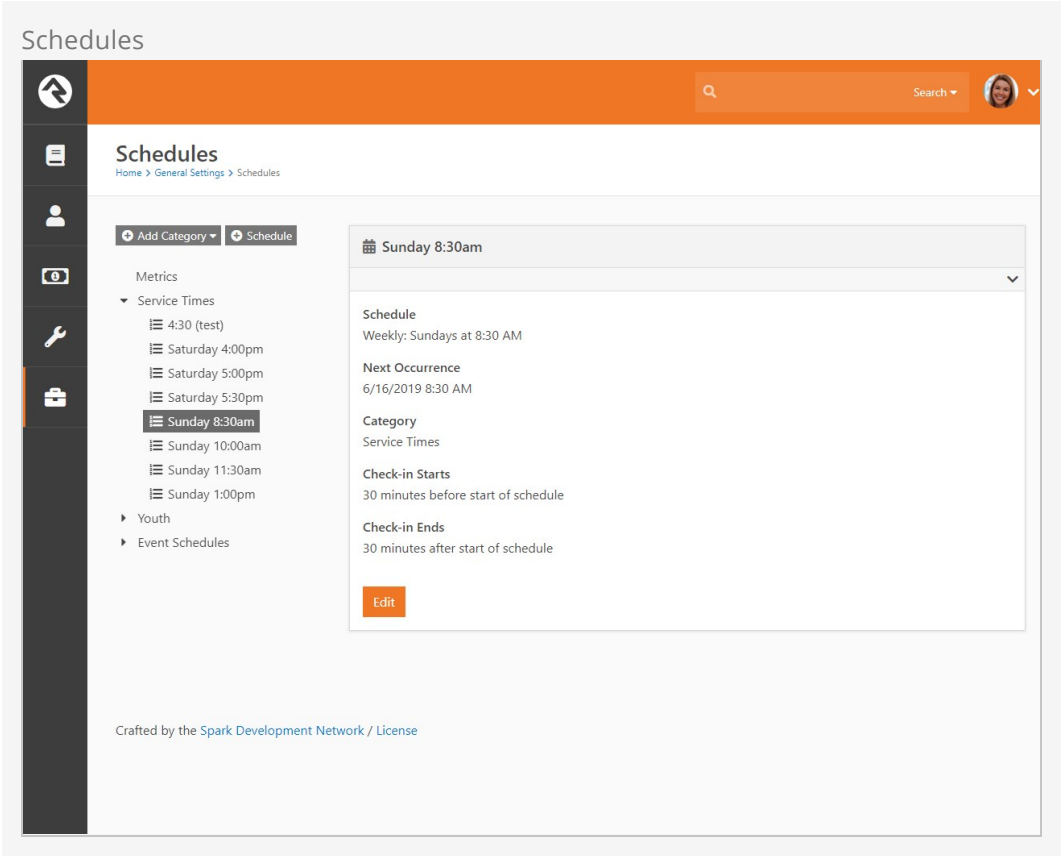
There are two critical pieces of the puzzle you need before starting to schedule volunteers. It's simple to get these pieces because when it comes to asking for help, people are hardwired to know *when* and *where* they are needed. So, we are going to make sure our `Named Locations` and `Schedules` are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

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

> Adding Location Types:
> Location Types (Campus, Building, Room, etc.) are *Defined Types*. To add more, open the Defined Type *Location Type* associated with the Location category and click the ⊕ button.



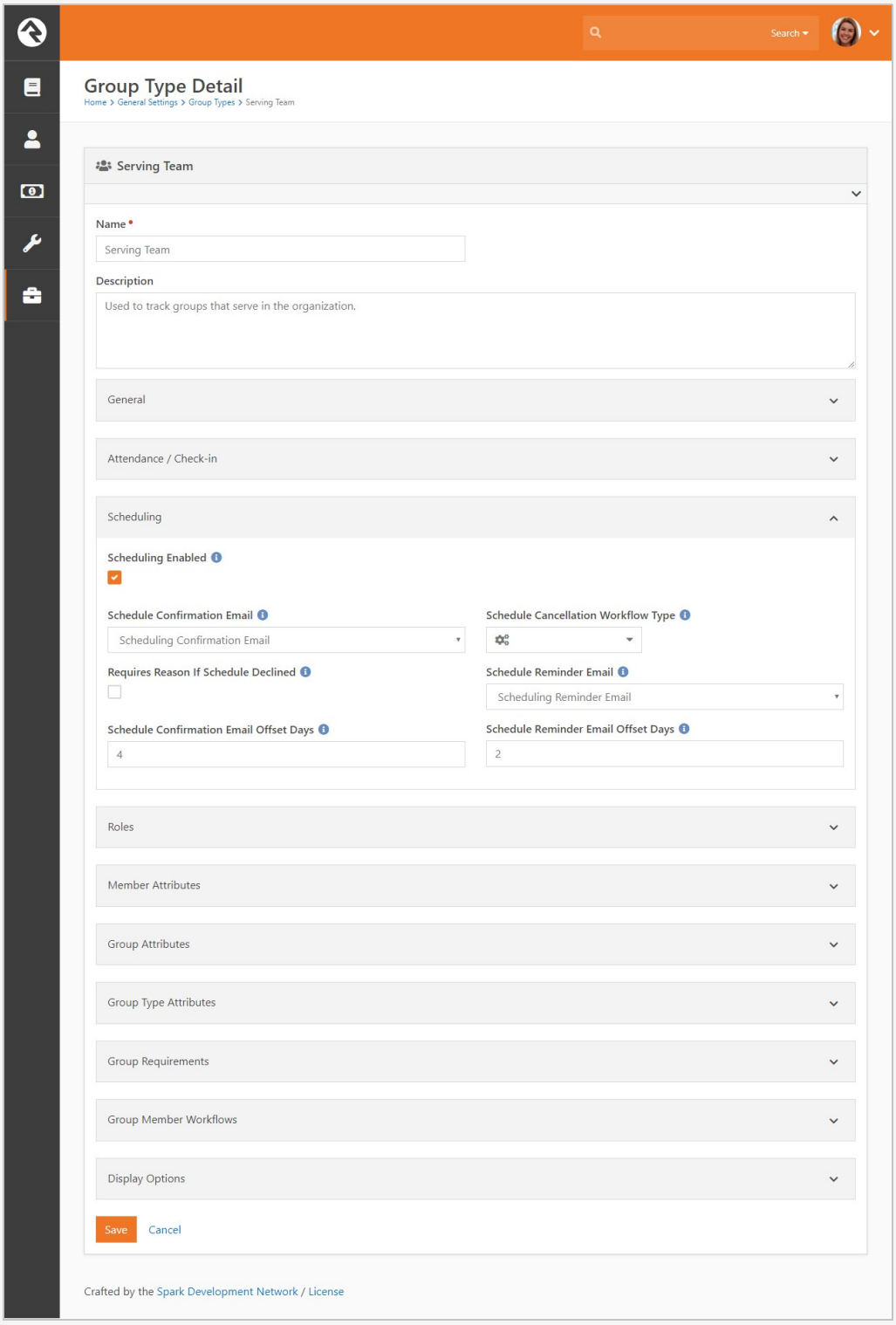
Next up: schedules, also known as times. This is found in `General Settings > Schedules`. You should have a few parent groups for different types of schedules. For group scheduling, we want to make sure the times are accurate since, you guessed it, location and time are critical aspects of scheduling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



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

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

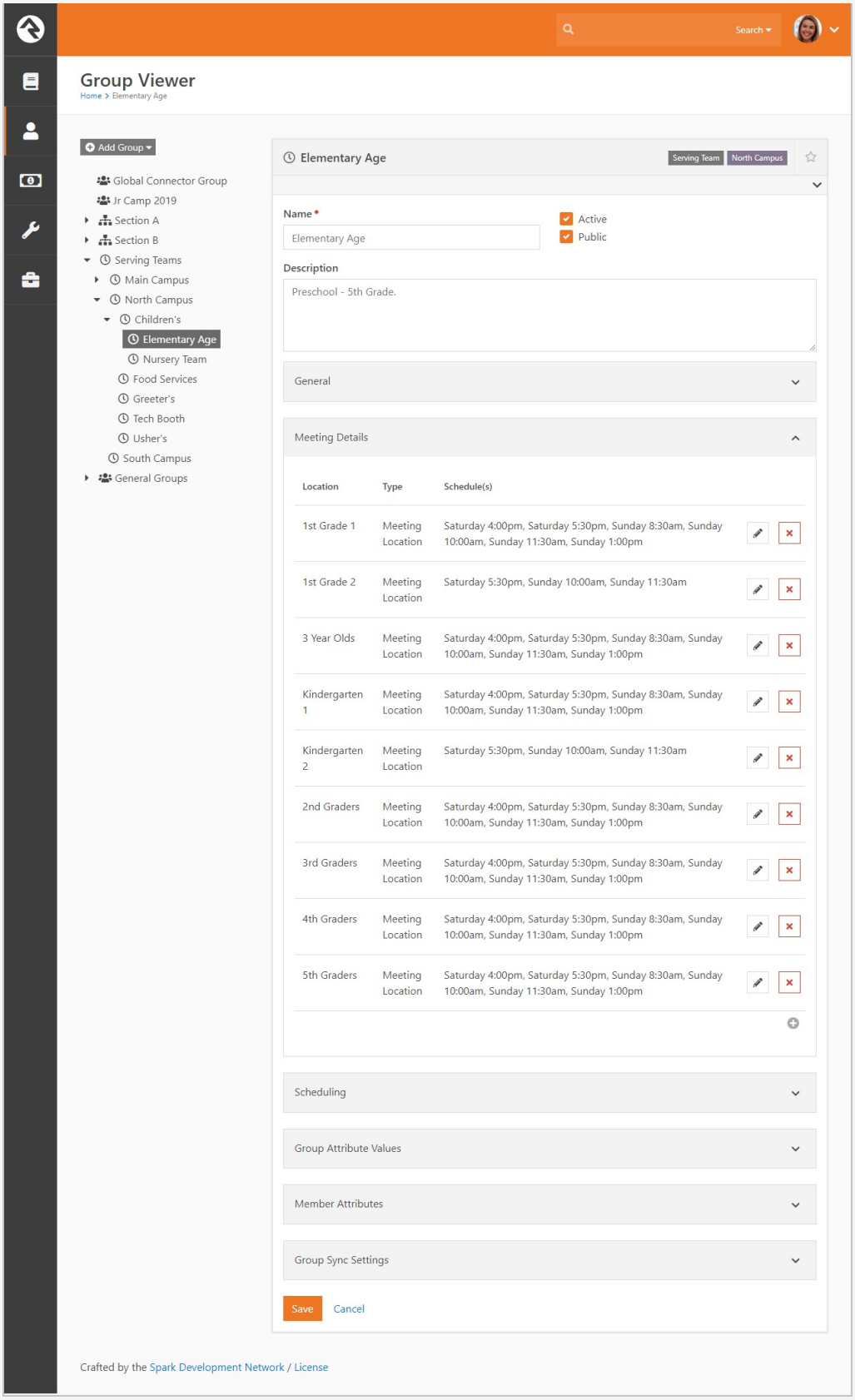
Group Type



Configuring Groups

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

Meeting Details



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

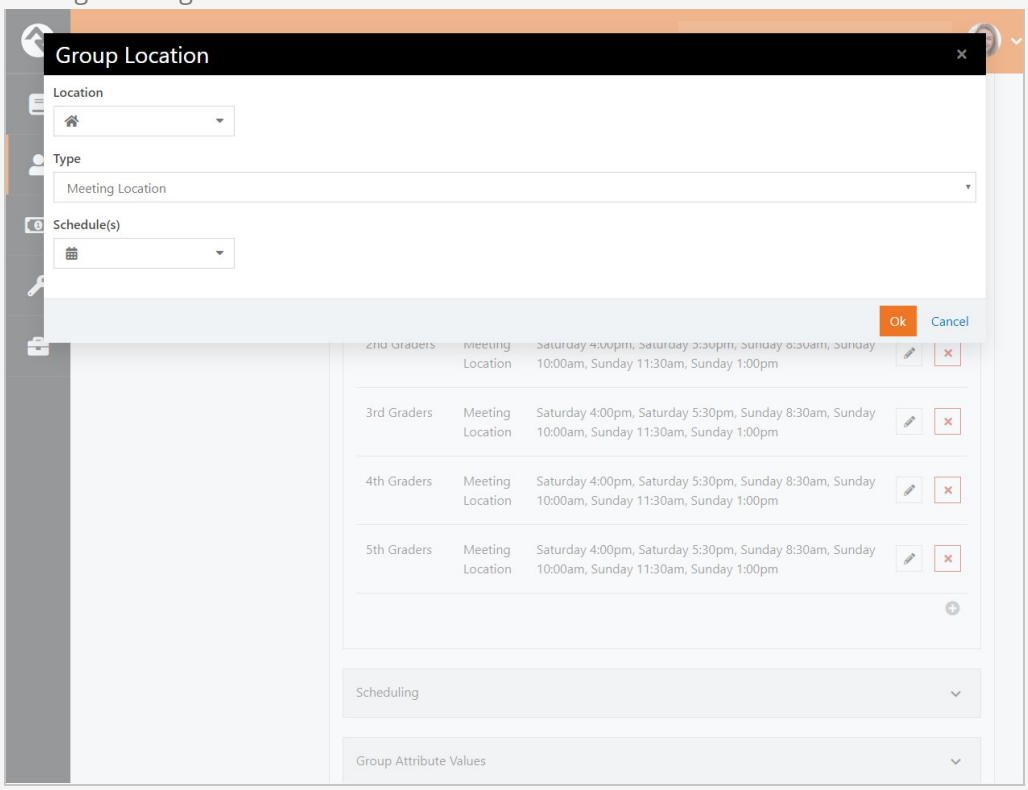
each group. You can break your groups up any way that works best for your flow of work. We recommend that you do some planning before jumping in and creating groups so you can maximize the effectiveness of this feature for your staff.

Meeting Details

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

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

Adding Meeting Details

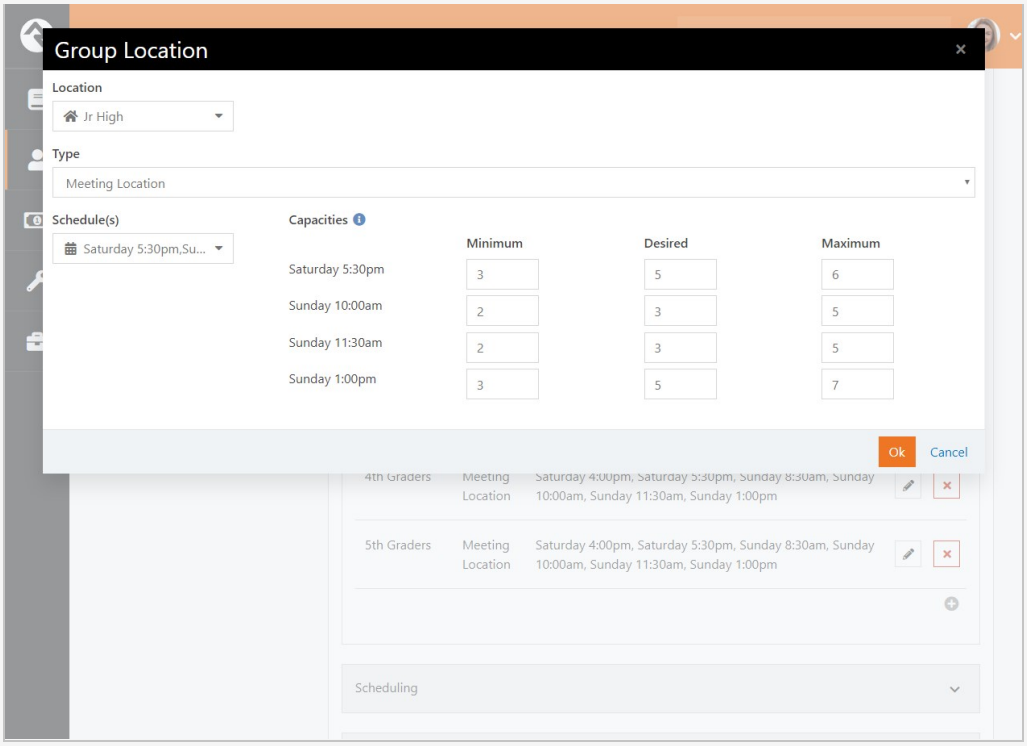


1. **Location**
   Choose from the drop down (these are the rooms from the named location page).
2. **Type**
   These are Defined Types found in `General Settings > Defined Type > Group | Location Type.`
3. **Schedules**
   This drop down shows all the times from the `Schedules` page in General Settings.

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

people needed for that room and its times.

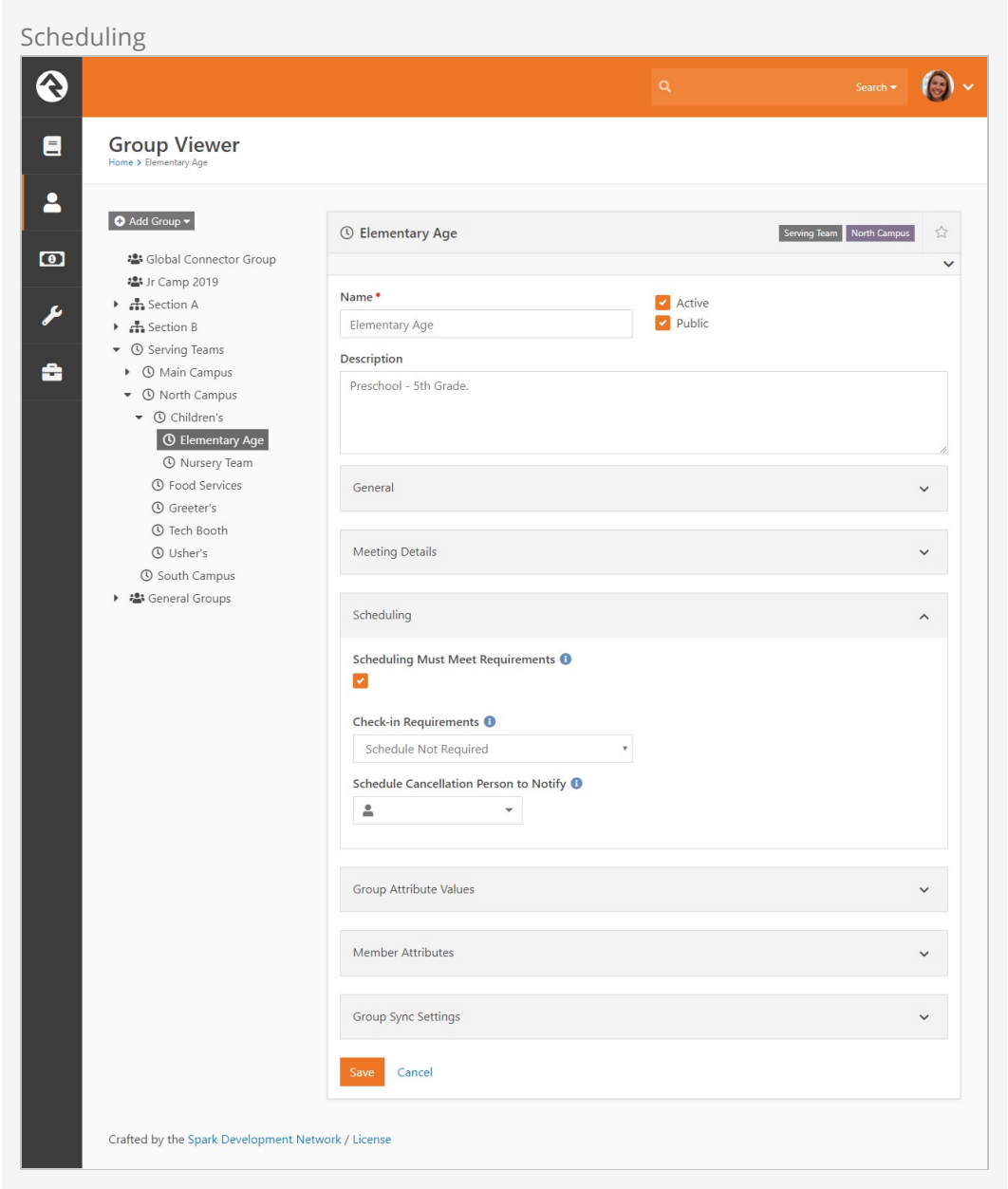
Capacities



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

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

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



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

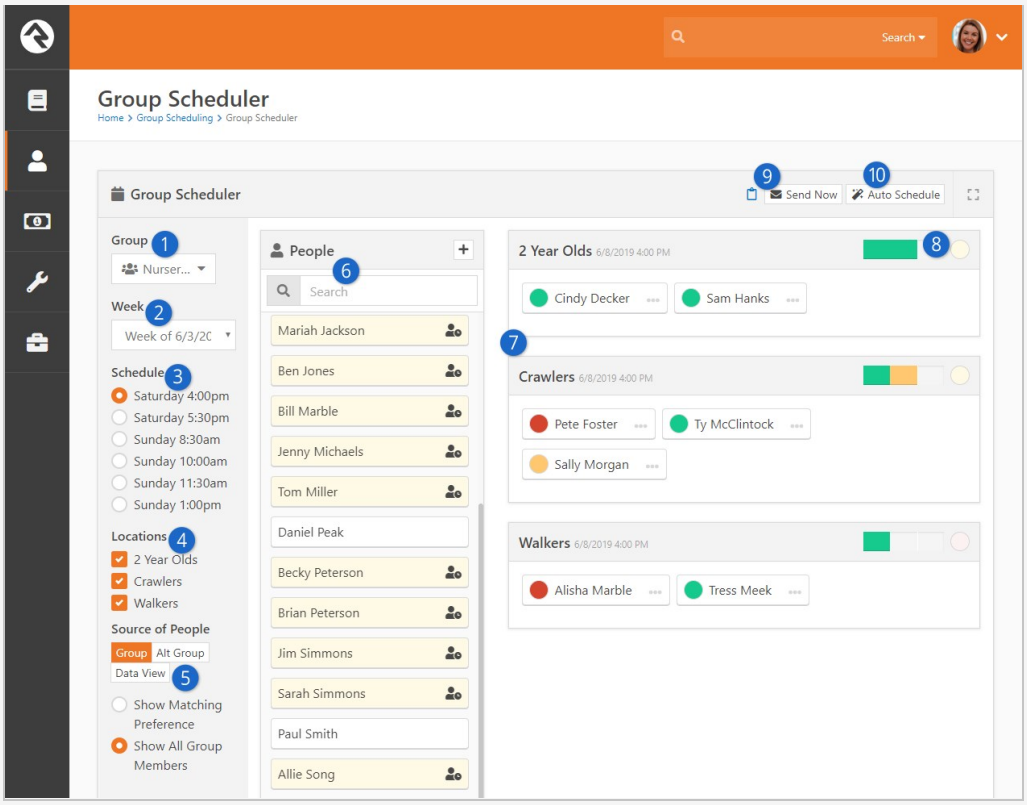
Group Scheduler

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

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

Navigating Group Scheduler

Group Scheduler



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

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

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

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

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

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

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

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

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

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

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

Auto Schedule Vs. Manual Schedule

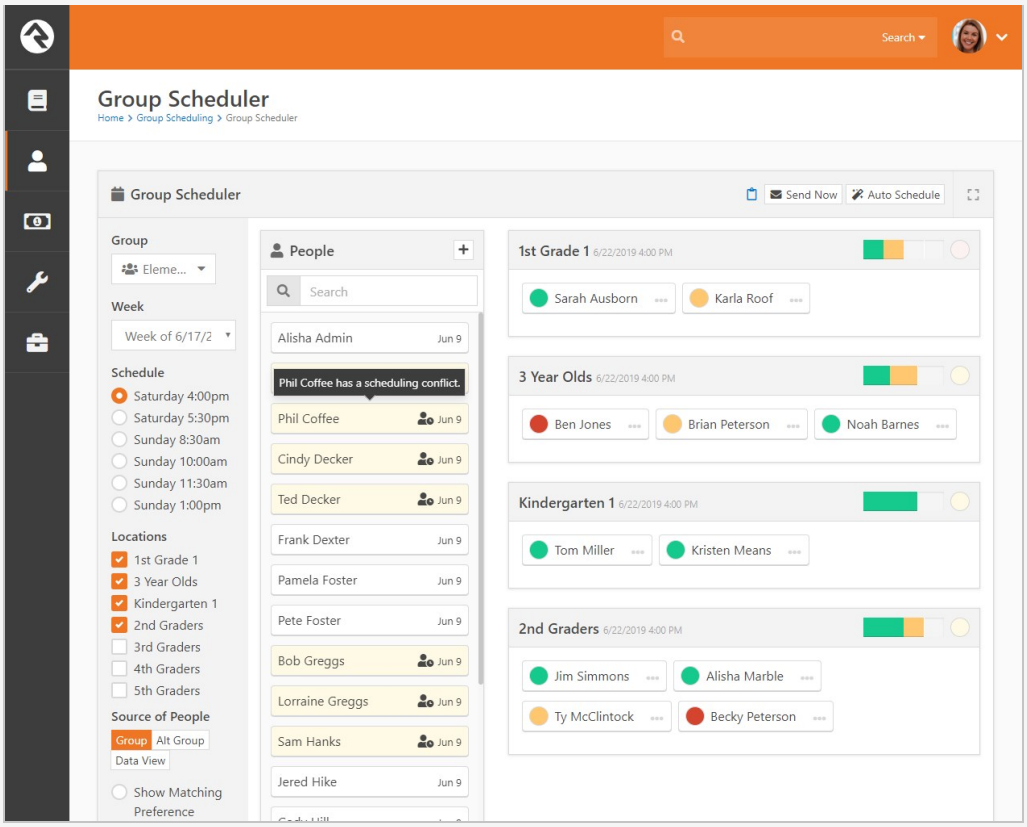
Auto scheduling works based on the `preferences` set by volunteers. In both an individual's My Account page on the external site, and on the groups page on an internal site person profile, there is a scheduling toolbox. These are the same, connected toolboxes so whatever a person sets on their external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

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

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

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

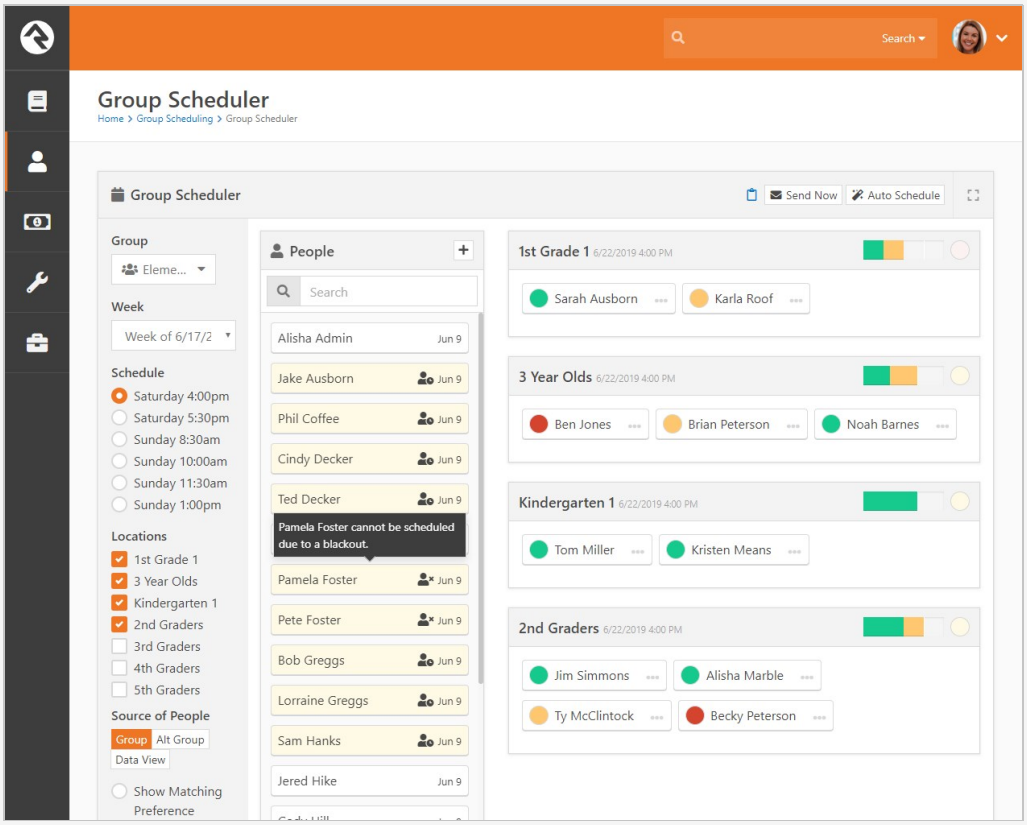
Conflict



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

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

Blackout



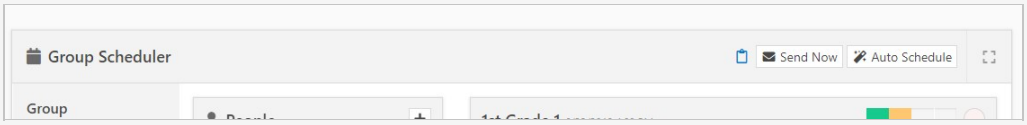
If you have multiple sites that are close enough to each other that some people volunteer at more than one location, you will run into a scheduling conflict that doesn't appear as one if the locations have different schedules. For example, one site might have a 4:30pm and 6:00pm schedule while the other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

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

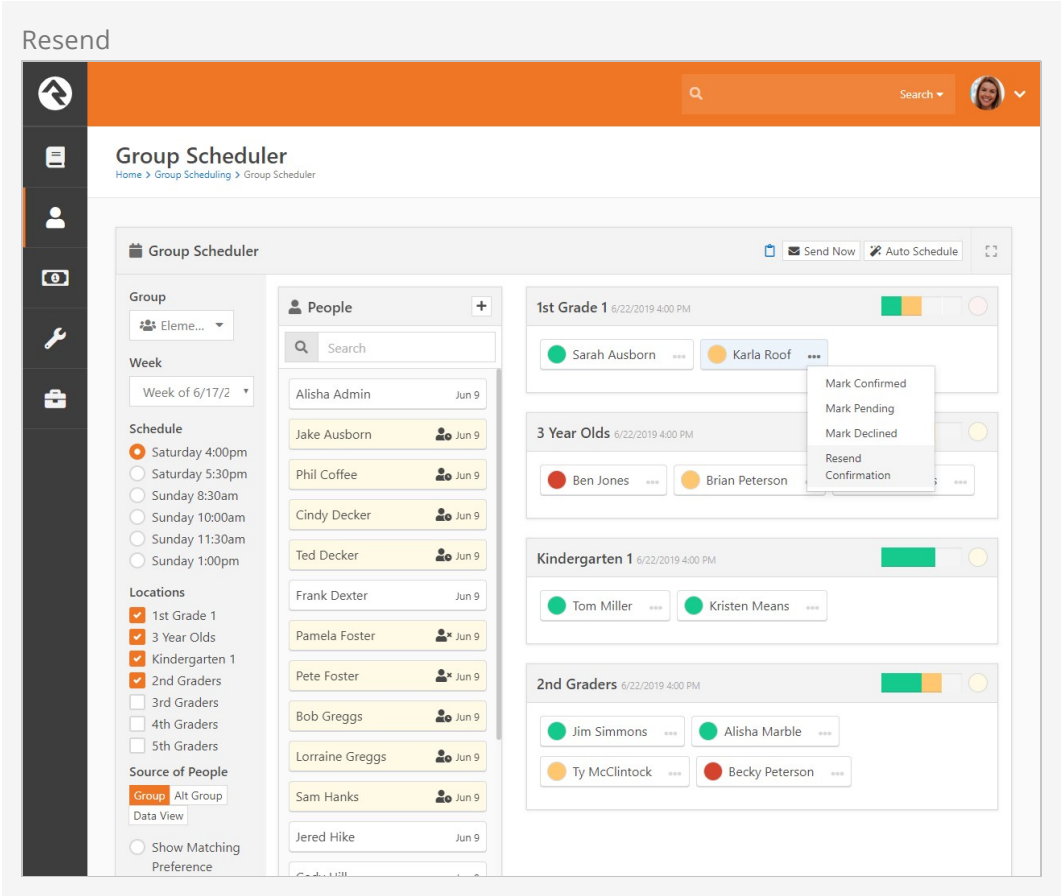
Confirmation Email

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

Send Now



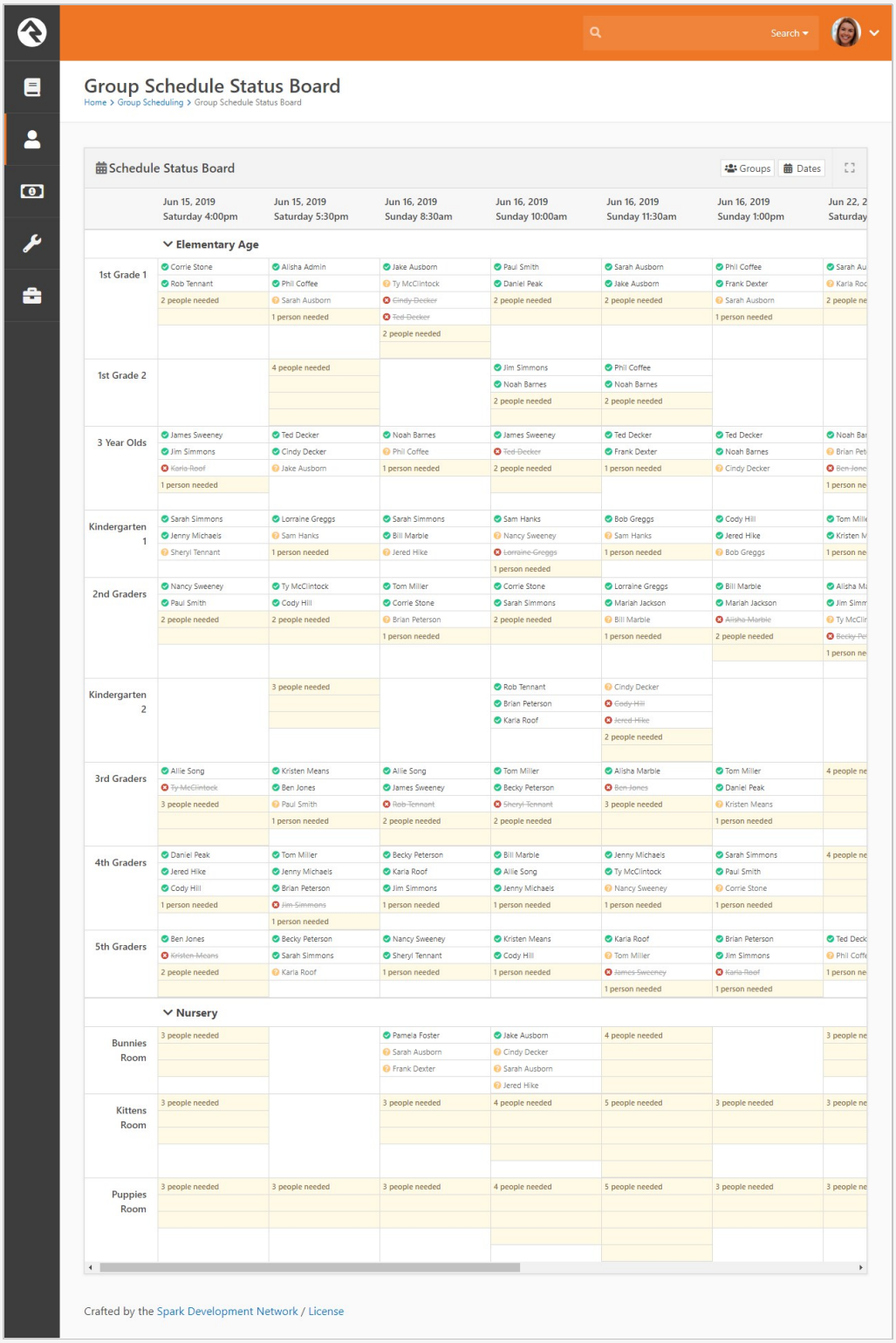
Alternatively, you can send an individual an email to accept or decline by clicking on the three dots near their name. This opens a drop down list of options where you can choose the `Resend Confirmation` button to send the email to confirm or decline again.



Schedule Status Board

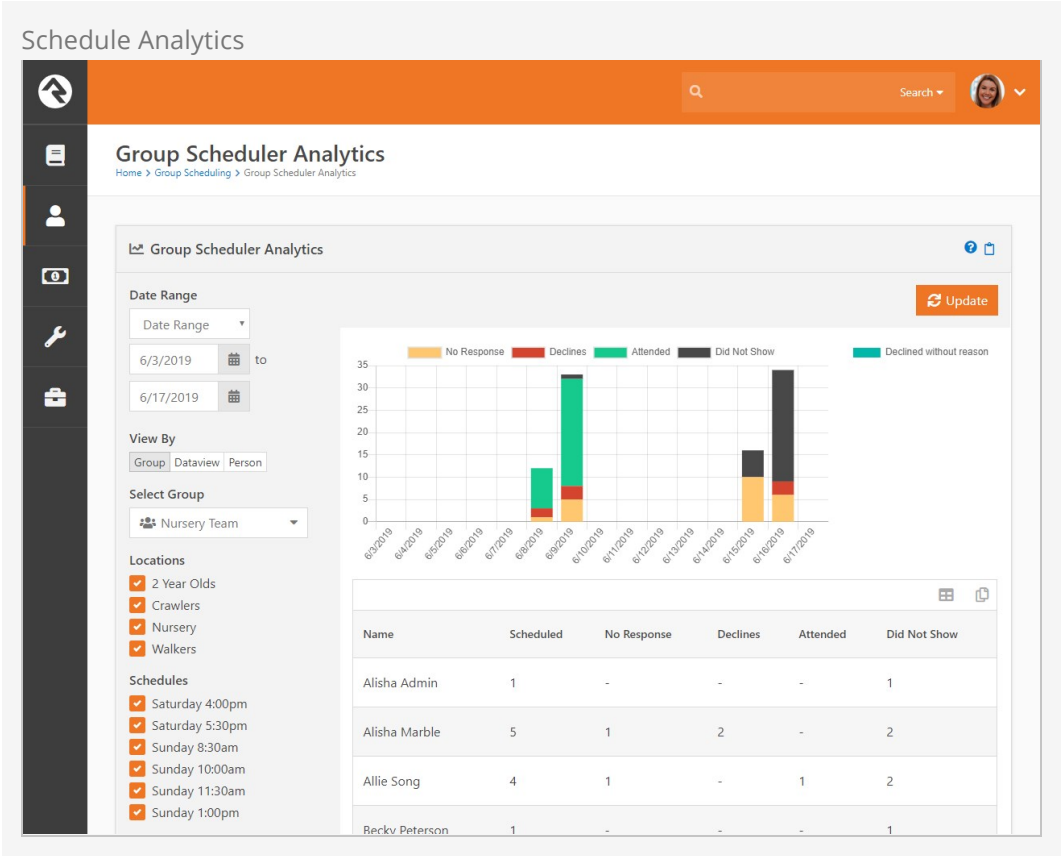
The status board gives you a bird's-eye view of the rooms and times which shows what is covered and what is still needed. The block settings allow you to choose a parent group to filter out any unnecessary groups showing in the select groups list. The `dates` button opens a slider bar to choose how many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

Status Board



Schedule Analytics

The analytics board acts similarly to the scheduler page where you choose the group, location and time then hit `update` and it will show records of the response or lack thereof in one place.



System Communications

We have schedule confirmation request and reminder system communications already set up for you, which are of course customizable to fit your organization's lingo. Just like all system communications, you can view and modify them under `Admin Tools > Communications > System Communications.`

See our `Communicating With Rock` guide for more information.

Jobs

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

Group Blocks

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

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

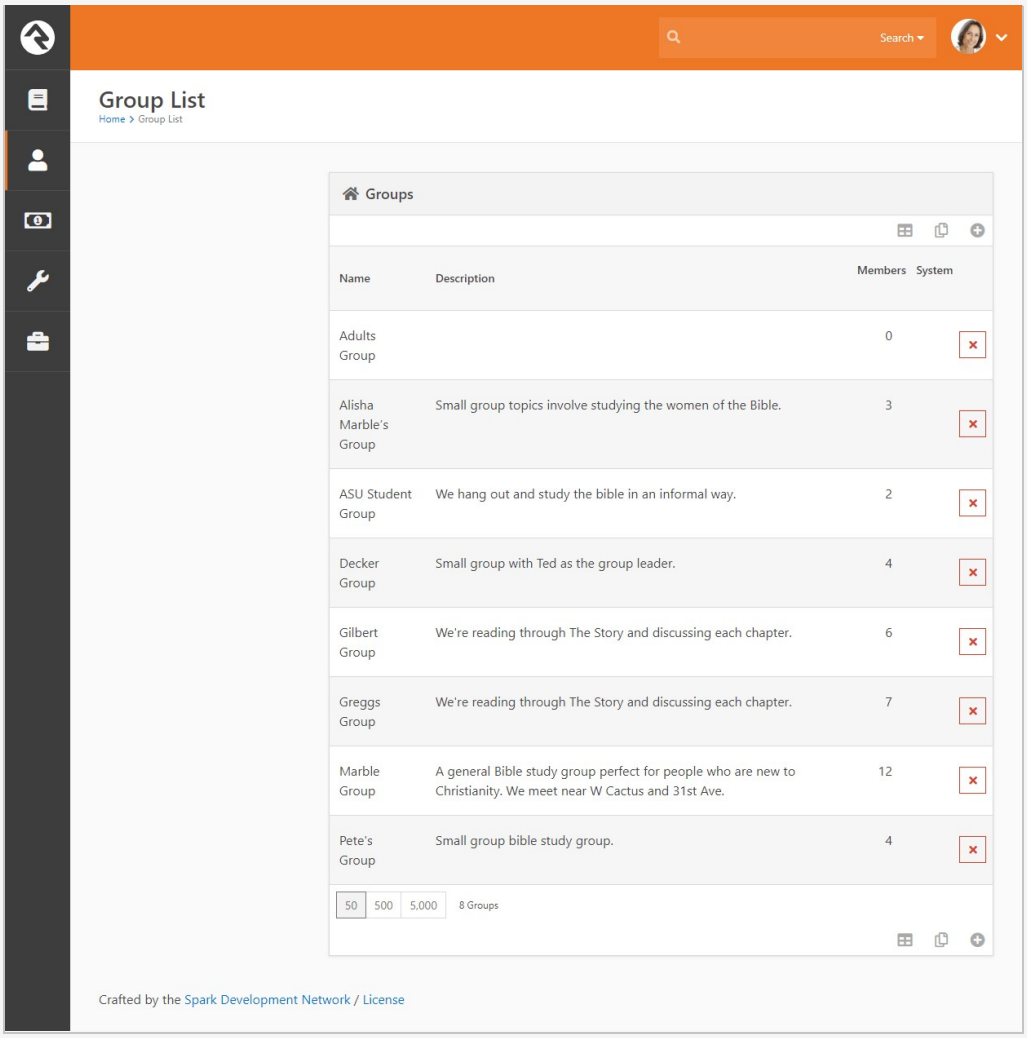
Group List

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

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

Below is an image of a sample group list.

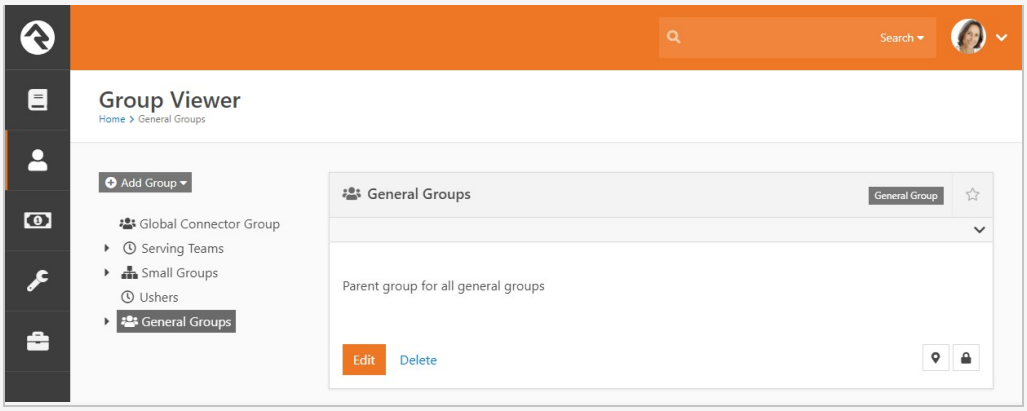
Group List Block



Group Tree View

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

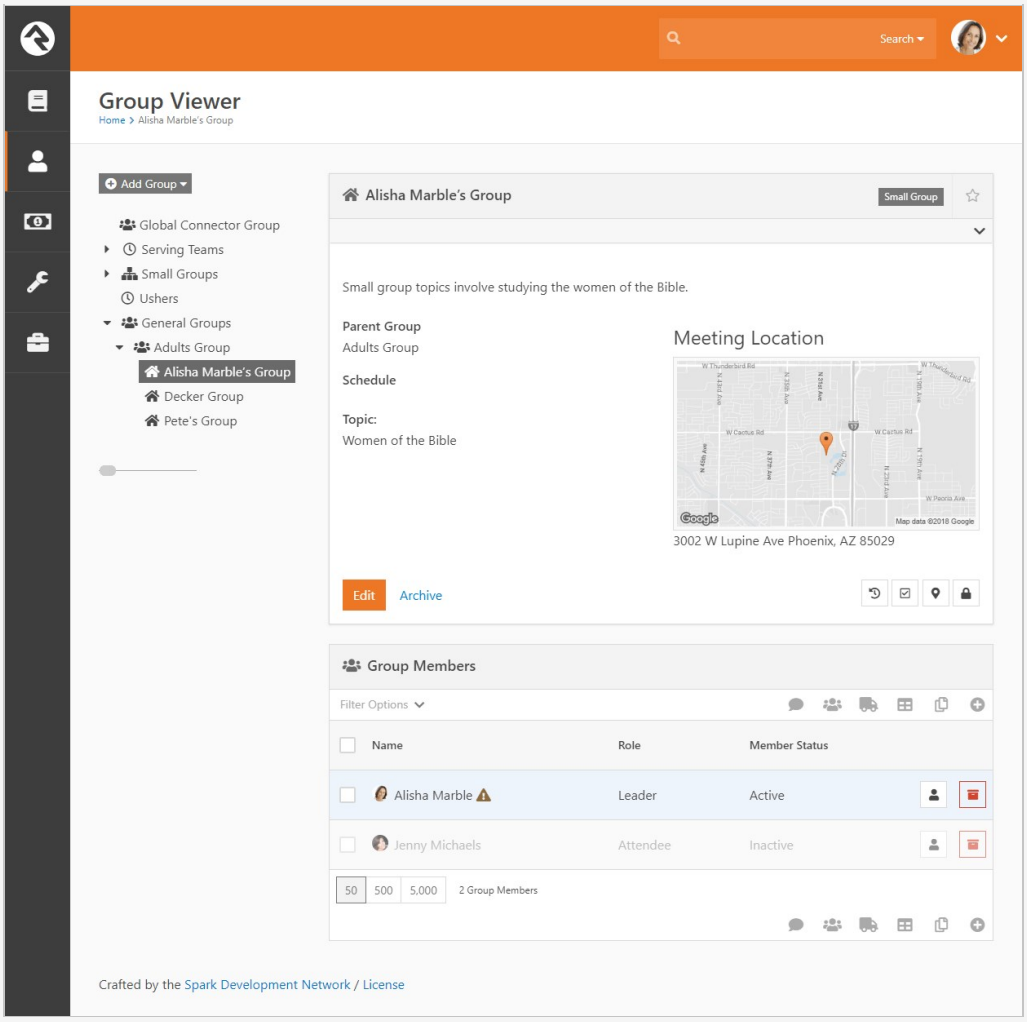
Group Tree View Block



Group Details / Group Member List / Group Member Details

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

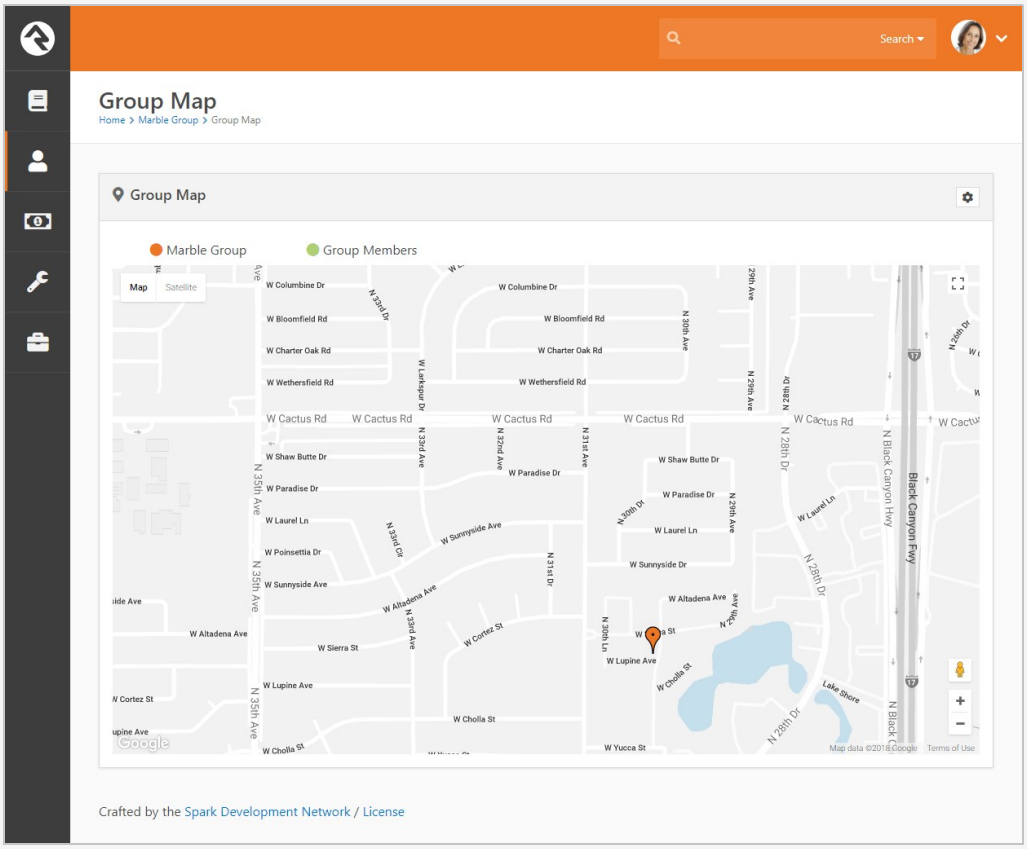
Group Details & Member List Blocks



Group Type Map

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

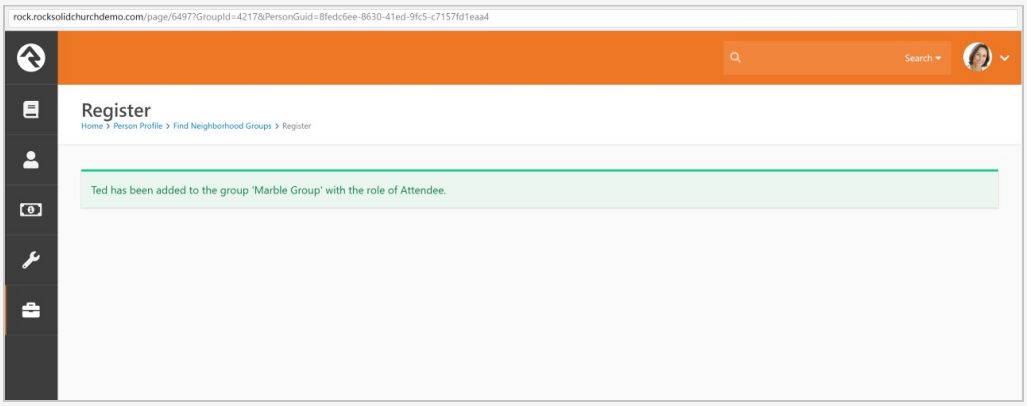
Group Type Map Block



Group Member Add From URL

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

Add Group Member From URL



Group Member Remove From URL

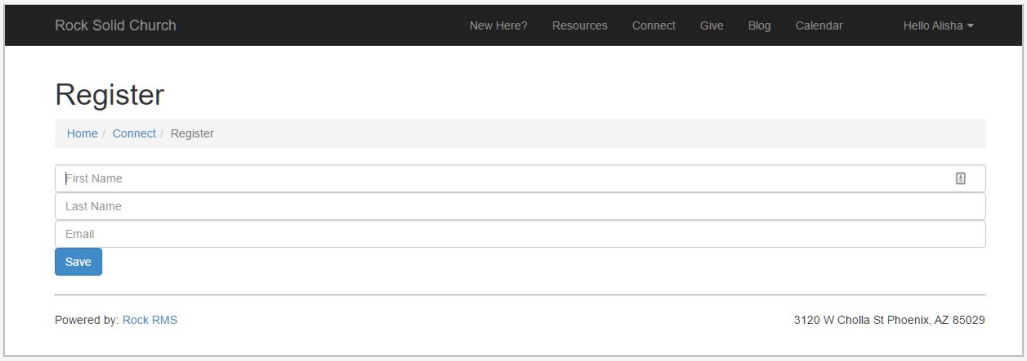
This block is just like the Group Member Add From URL block - but the opposite. It takes

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

Group Simple Register

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

Simple Register Block

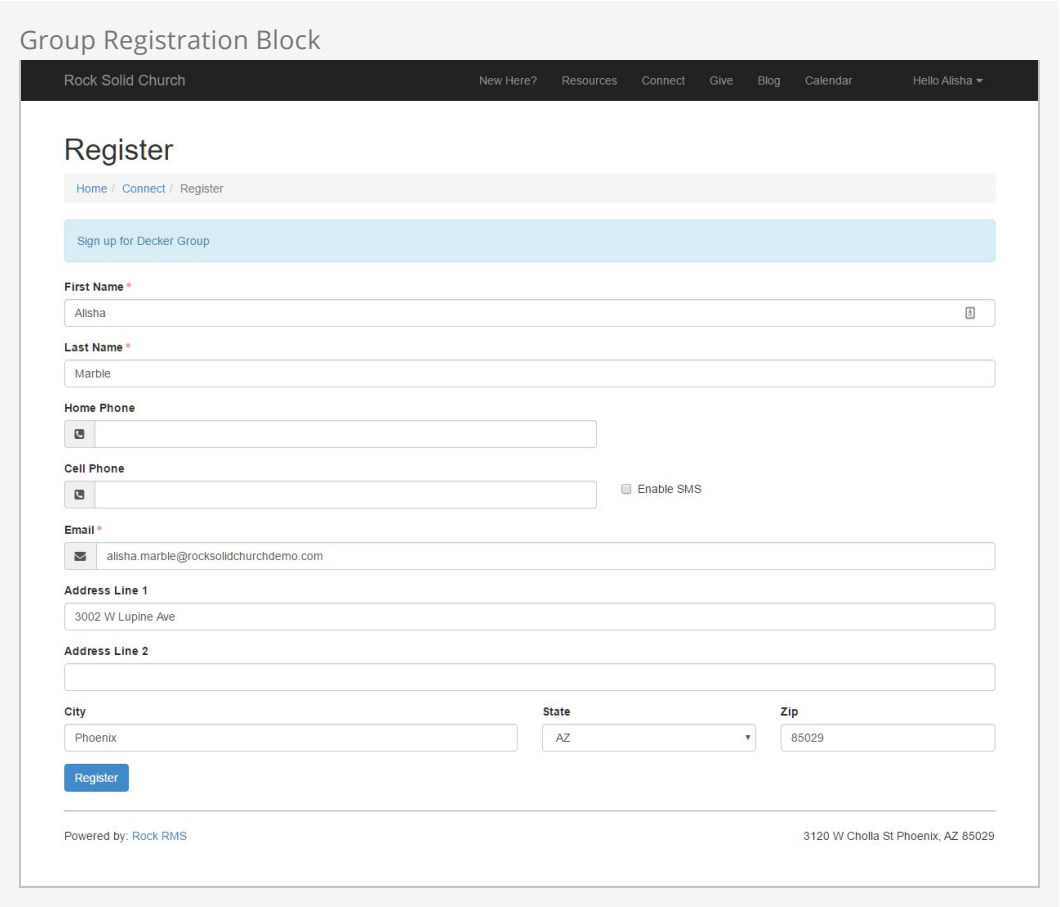


Simple Register Confirmation

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

Group Registration

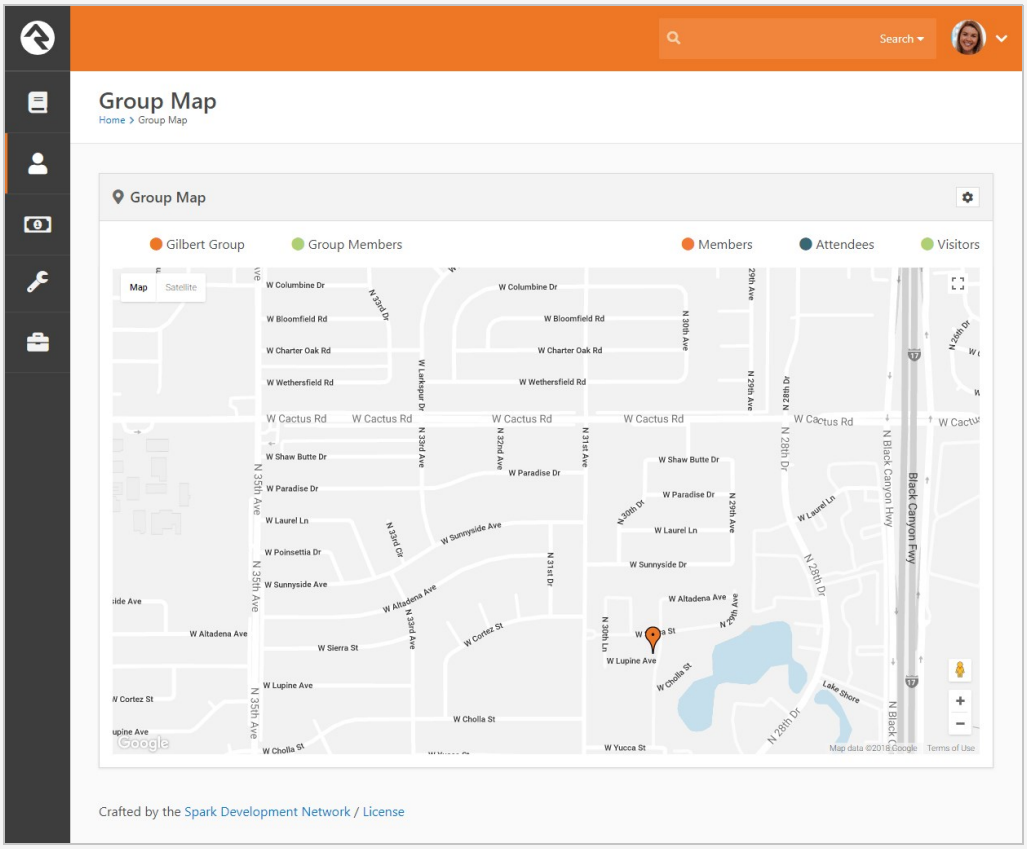
This block is the big brother of the Simple Register block. This block takes a GroupId as a query parameter for context and allows you to do a few neat things like fire off a workflow when a user registers and use Lava options to format the registration form. It also has a full mode that takes down address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



Group Map

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

Group Map Block



You'll notice two sets of color-coded labels near the top of this block. Clicking these will toggle the display of groups and families on the map. Below is a description of how and when these label toggles will appear.

Group / Group Member Labels (top left)

- If the selected group has a valid geopoint, or geofence location, that group's name will be displayed as a label in the upper left which can be used to toggle the display of the group. The group will be displayed on the map either as a marker or a polygon depending on whether the selected group had a geopoint or geofence. The color of the marker or polygon is determined by the first color specified in the *Colors* attribute of the selected mapstyle defined value. Note: this option will not appear if the selected group does not have a geopoint or geofence defined.

- A *Groups* label will be displayed if the selected group has any child groups with a valid geopoint or geofence location. The child groups may also be either a marker or a polygon. The color of markers is determined by the second color specified in the *Colors* attribute of the selected mapstyle defined value. The color of polygons is determined by the *Polygon Colors* block setting.

- A *Group Members* label will be displayed if the selected group has any members with a valid geopoint location. Clicking the label will toggle the display on the map of those members. Note, if the selected group is displayed as a polygon, these members may or may not be within the boundaries of the polygon. The color of

the markers is determined by the third color specified in the *Colors* attribute of the selected mapstyle defined value.

Connection Status Labels (top right)

- If the selected group has a geofence location and is displayed as a polygon on the map, then the block will also display a list of *Connection status* labels to toggle the display of families whose locations fall within the boundaries of that polygon.

- The connection statuses that will be included as toggle options are determined by the Connection Status Defined Values. Only those defined values that have a value specified in the *Color* attribute will be displayed. The color value is also used to determine the color of the markers.

- Only families with at least one active record will be included.

- If family members have different connection statuses, they will be ordered by the connection status defined value order, and the first connection status found will be used for the family. For example, if a family has a member and a visitor, the family will be displayed when the *Member* label is selected.

Service Jobs Relating to Groups

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

> **Learn More**
>
> This section highlights unique aspects of service jobs relating to groups. For information on setting up jobs in general, see the `Admin Hero Guide`

Send Attendance Reminders

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

- **Group Type:** The group type that the reminders are for.

- **System Communication:** The system communication that you would like to use for sending the reminder. Rock ships with a *Group Attendance Reminder* system communication for this purpose.

- **Send Reminders:** By default, a reminder will always be sent the day the group meets. By adding values here you can configure additional reminders if the attendance has not been entered. For instance, entering *2,4* would send reminders 2 and 4 days after the group has met if no attendance has been entered.

- **Send Using:** Choose whether the reminder should be sent via SMS text message, email or either according to the group leader's preference. Group leaders can set their preference in the Group Leader Toolbox.

> **SMS Job Errors**
>
> If the reminder job is configured for SMS, and if a person's communication preference is SMS but they don't have an active/valid SMS number, then the job will record an error. Similarly, if the job can't find the SMS configuration it needs, then it will also record an error message to the job's status/history message.

Group Leader Pending Notifications

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

- **Group Type:** The group type to filter off for limiting the groups that are checked for pending members.

- **Include Previously Notified:** This determines if only newly pending members should be sent to leaders, or if pending members who have already been sent once should also be considered. Note that when you initially set up this job, none of the current pending members will have been marked as sent, so they will all be sent to leaders on the first run.

- **Notification Email:** This is the system communication template that should be used. A sample one is provided out of the box for you to use or edit as you see fit.

- **Group Role Filter:** This is an optional setting that allows you to only include pending members of a specified role. If you don't select a role, all roles will be considered.

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

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

Send Group Attendance Digest

This job sends a summary of group attendance information to certain group *Leaders*. See the Group Attendance Digest section above for details on the group structure requirements for this job. When you're configuring this job, pay close attention to the following configuration options:

- **Parent Group:** The job needs to know the highest-level parent group in the group structure to identify which child groups apply to the job.

- **System Communication:** This is the system communication template that should be used. A sample one is provided out of the box for you to use or edit as you see fit.

- **Date Range:** You can choose to send the attendance digest for either the 'Current Week' or the 'Previous Week'.

In order for the job to work correctly, the groups taking attendance must meet on a

regular (i.e. Weekly) schedule. If you have groups on a custom schedule, the Attendance Email may be a better fit.

Group Requirements

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

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

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

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

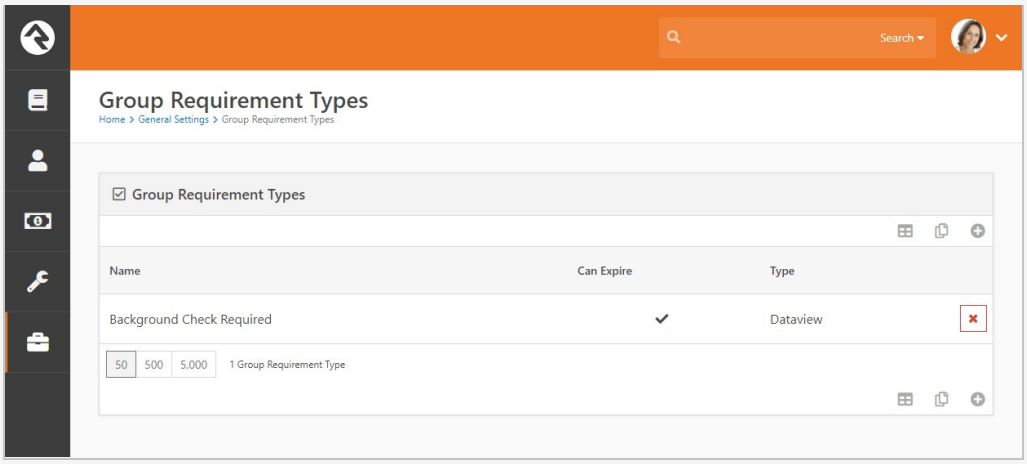
- **Positive:** The group member meets the requirement.
- **Negative:** The group member does not meet the requirement.
- **Warning:** Something in the middle. The specific definition of warning will depend on the configuration. For a background check, warning might mean that they have a passing background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

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

Defining Group Requirements

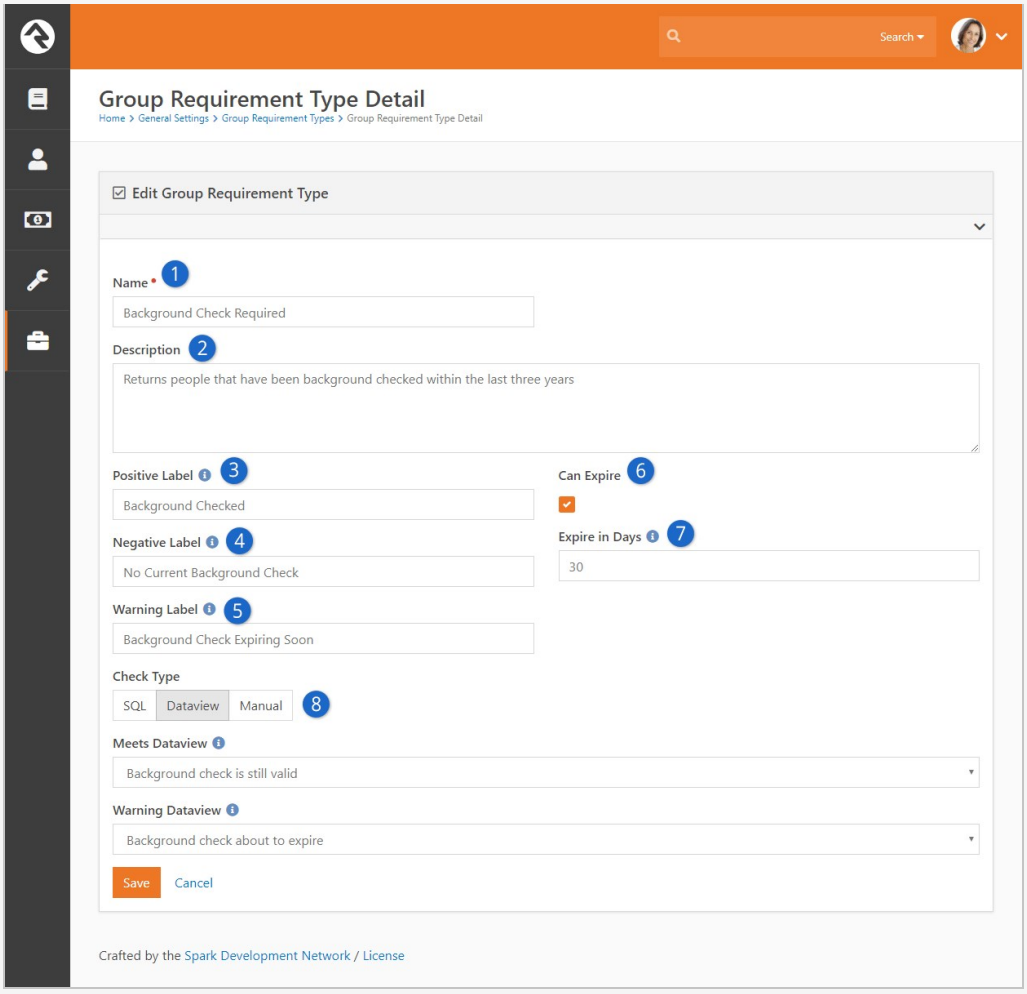
You manage group requirements under `Admin Tools > General Settings > Group Requirements`.

Group Requirements List



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

Editing Group Requirements



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

2 **Description**

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

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

4. **Negative Label**
   The label used when a group member does not meet the requirement.

5. **Warning Label**
   The label text that should be shown when the check meets the warning condition.

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

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

8. **Check Type**
   So how do we determine the logic of whether someone meets a requirement? Rock gives you three options:
   - **SQL:** In this case you provide a SQL statement. This statement should return a list of Person Ids in the database that meet that requirement.
   - **Dataview:** You can also select a dataview that returns a list of all the people who meet the requirement.
   - **Manual:** This requires someone to manually determines if a person meets the requirement.

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

Tips for Creating Data Views and SQL Expressions

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

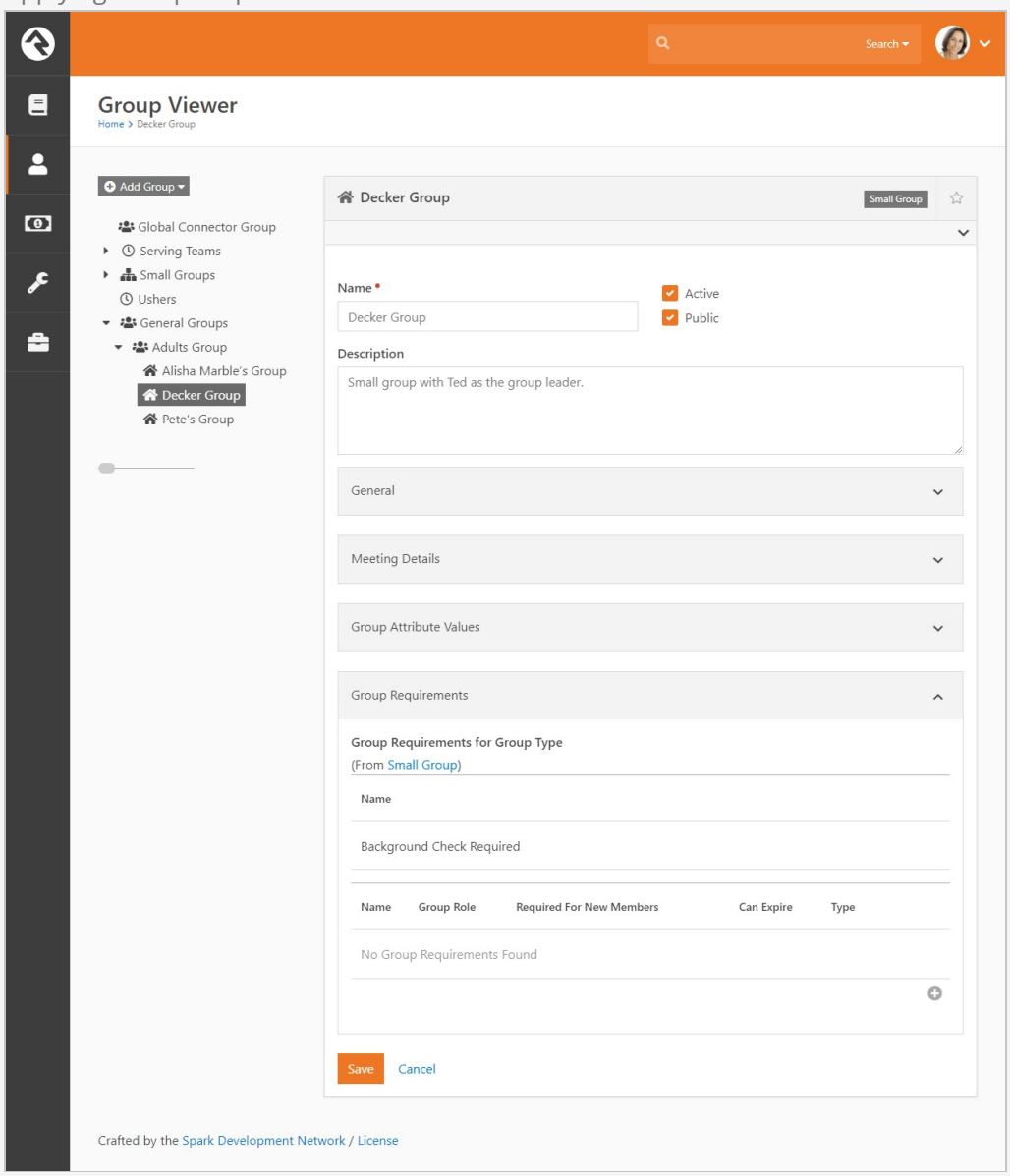
- **Meets** The dataview/SQL expression for meets should return a list of all the people in the database that meet this requirement.
- **Warning** This dataview/SQL express should return a list of all the individuals in the database in a warning state.

Applying Group Requirements to Individual Groups

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

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

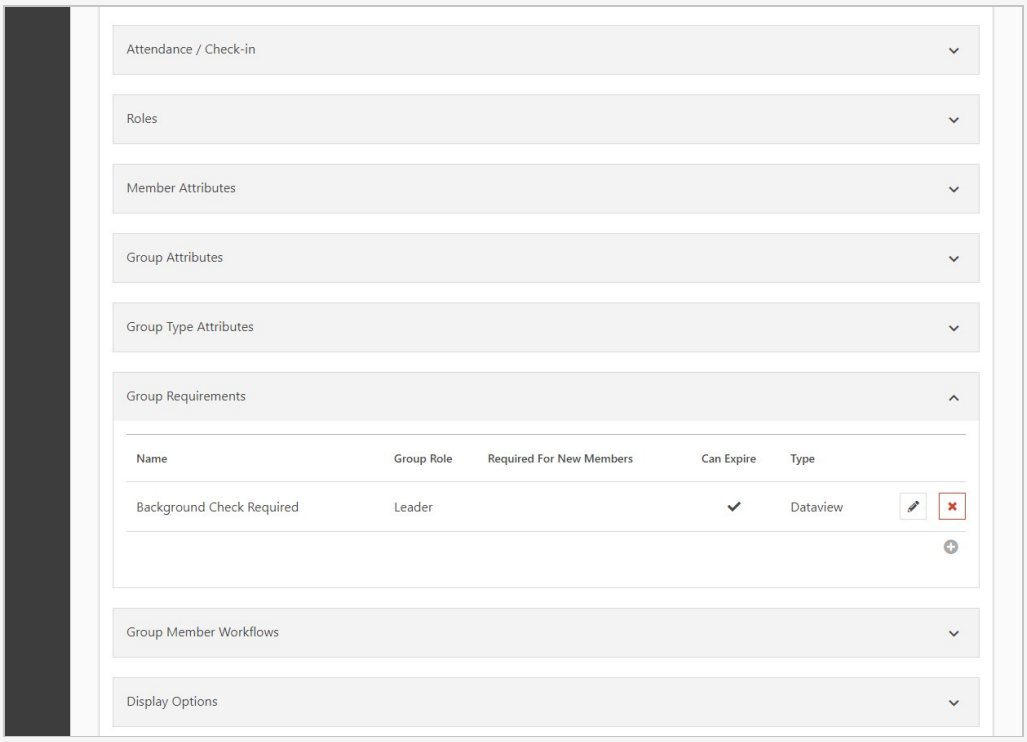
Applying Group Requirements



Applying Group Requirements to Group Types

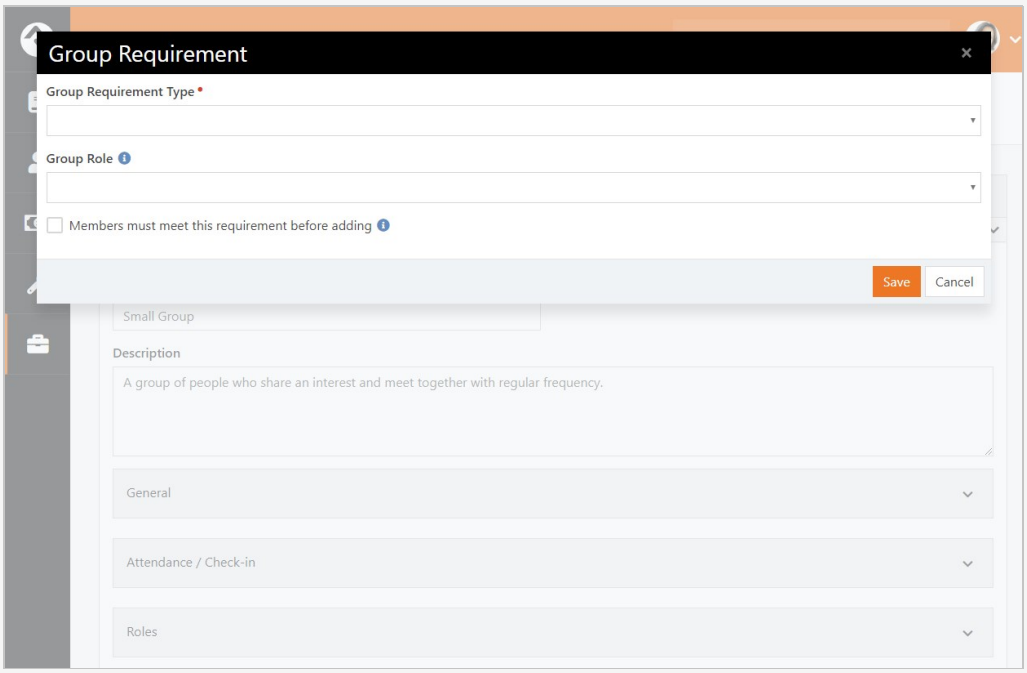
You can also set group member requirements at the Group Type level. This allows you to apply member requirements to all groups of a certain type rather than to each individual group.

Group Requirements Section - Group Type Detail Screen



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

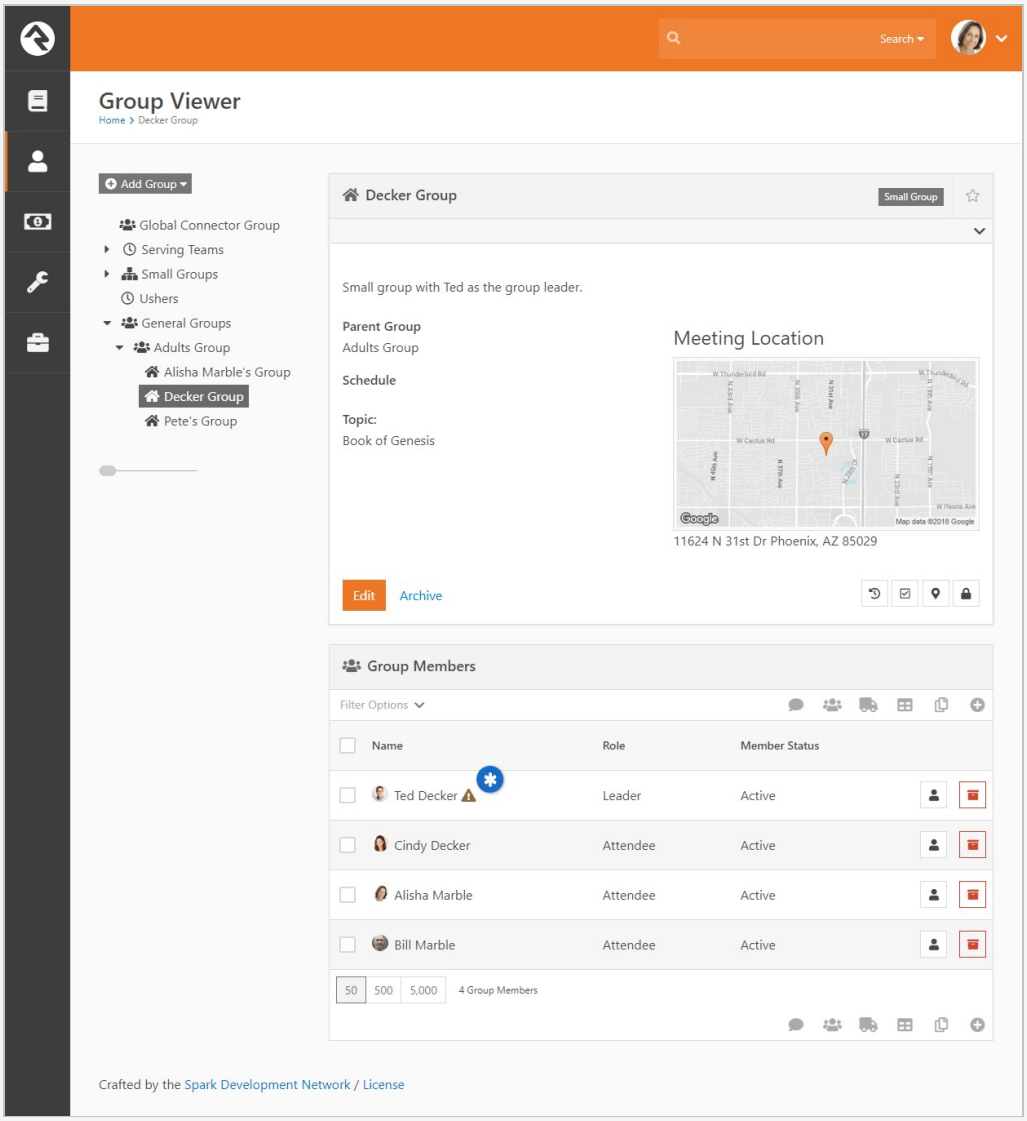
Adding New Group Requirement



Viewing Group Requirements

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

Viewing Group Requirements



Group Requirement Jobs

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

Calculate Group Requirements

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

Send Group Requirements Notifications

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

`Administration > General Settings > Group Types`.

Below is a listing of settings for this job.

- **Notification Template:** This is the system communication template that you want to use to format the communication. Rock provides a sample communication entitled *Group Requirements Notification* that's configured to meet most needs.

- **Group Types:** The group types you want to check the requirements on.

- **Notify Parent Roles:** This setting will notify the roles of parent groups of the group. This follows the hierarchy of the group structure all the way to the top. This ensures that top-level group leaders will receive notifications for all the groups under them.

- **Accountability Group:** The group you select here will get a listing of all group members not meeting requirements. Some might call this fascism but we prefer "inspect what you expect."

Fundraising Groups

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

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

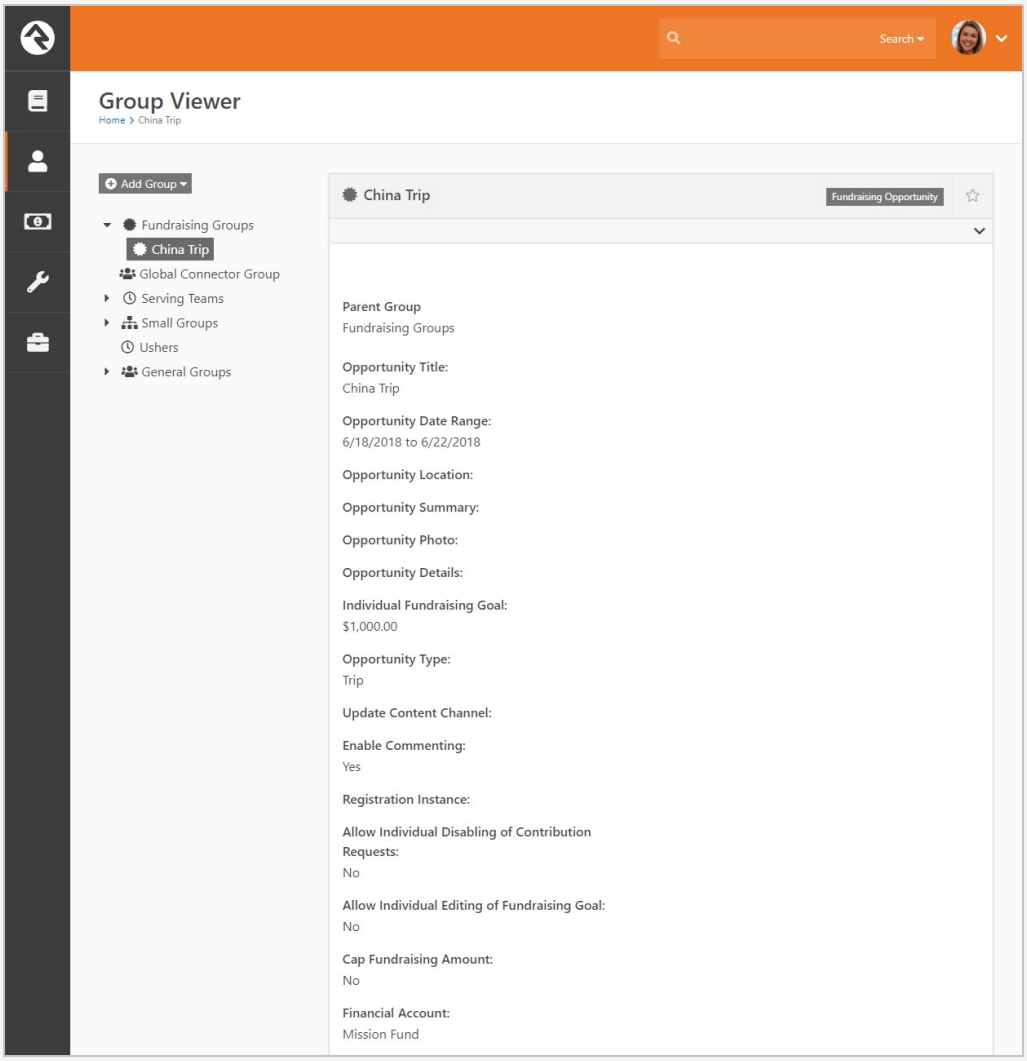
Each group will represent a specific type of fundraising activity. Examples include:

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

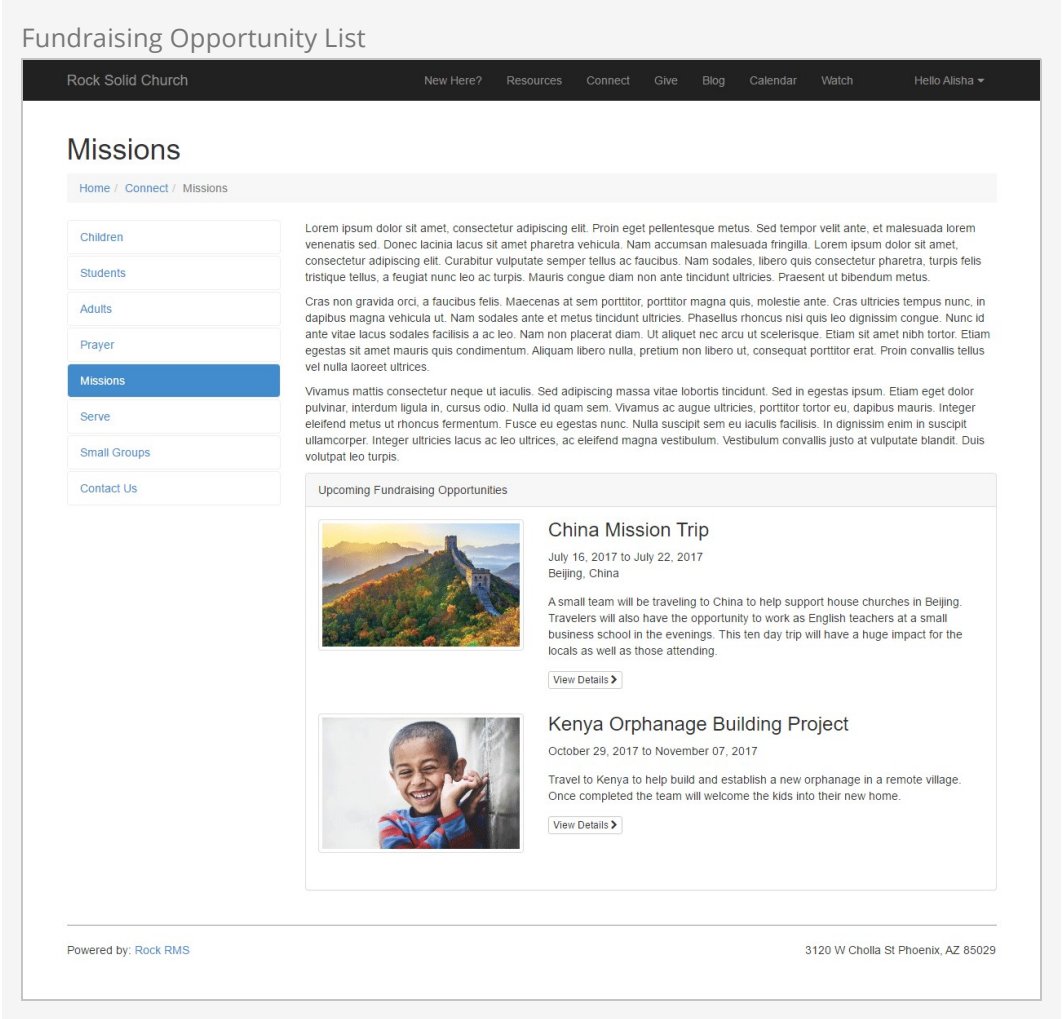
Fundraising Walk Through

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

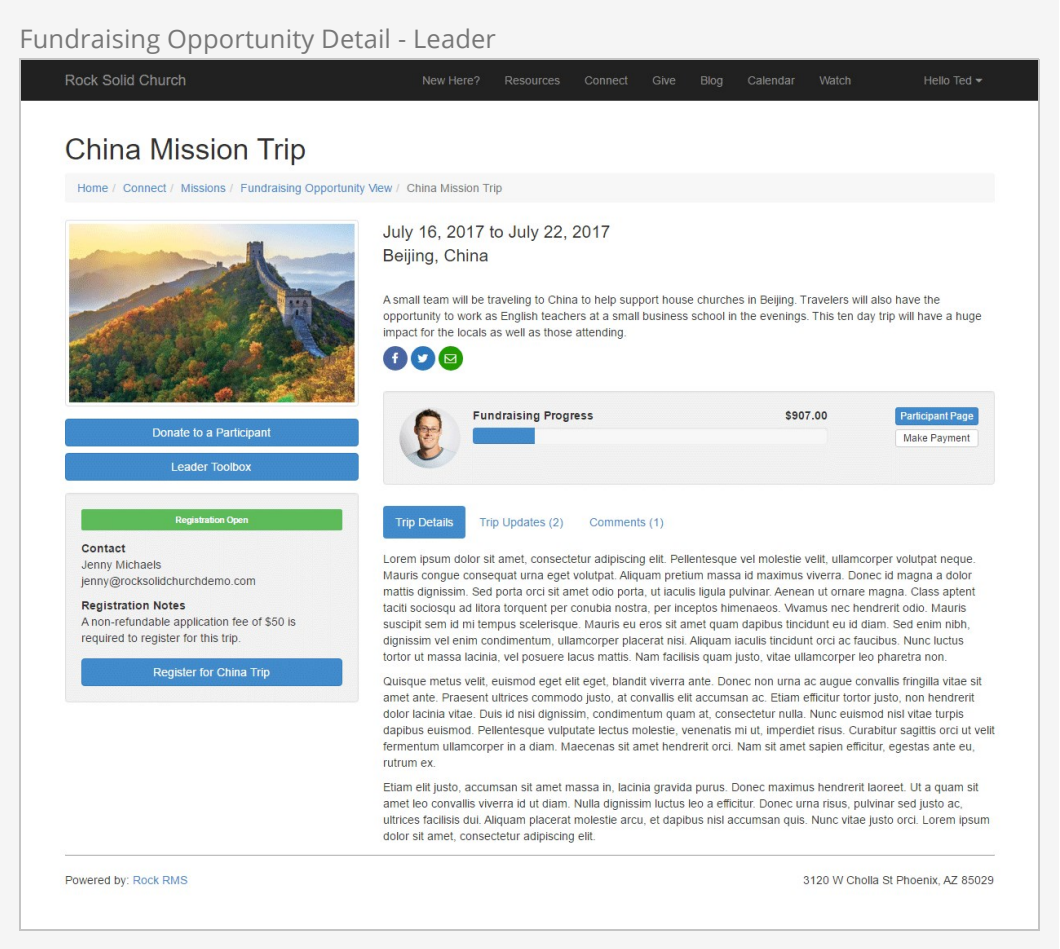
Fundraising Opportunities - Group Viewer



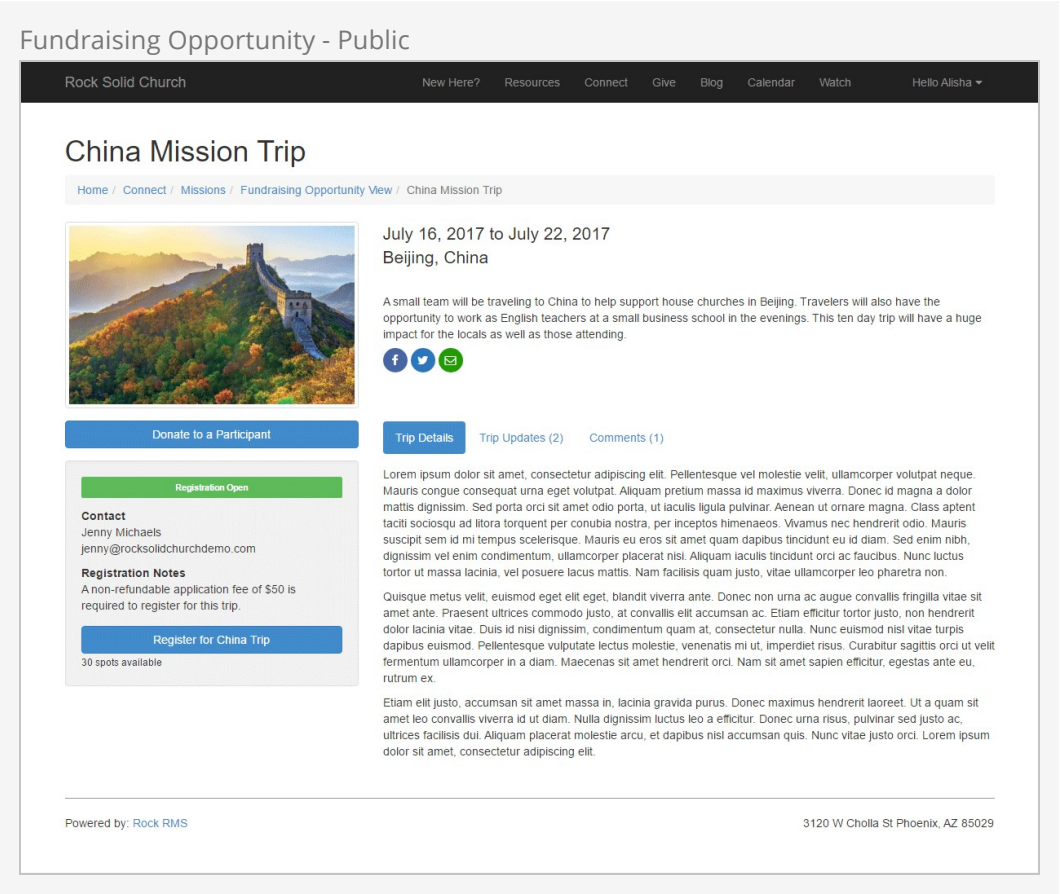
Ok, but that's the boring part. Let's start looking at how these groups are displayed on your external site! Out of the box Rock configures several pages to view fundraising opportunities. The pages are displayed under the Missions pages (found under the Connect menu item). The missions page lists the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



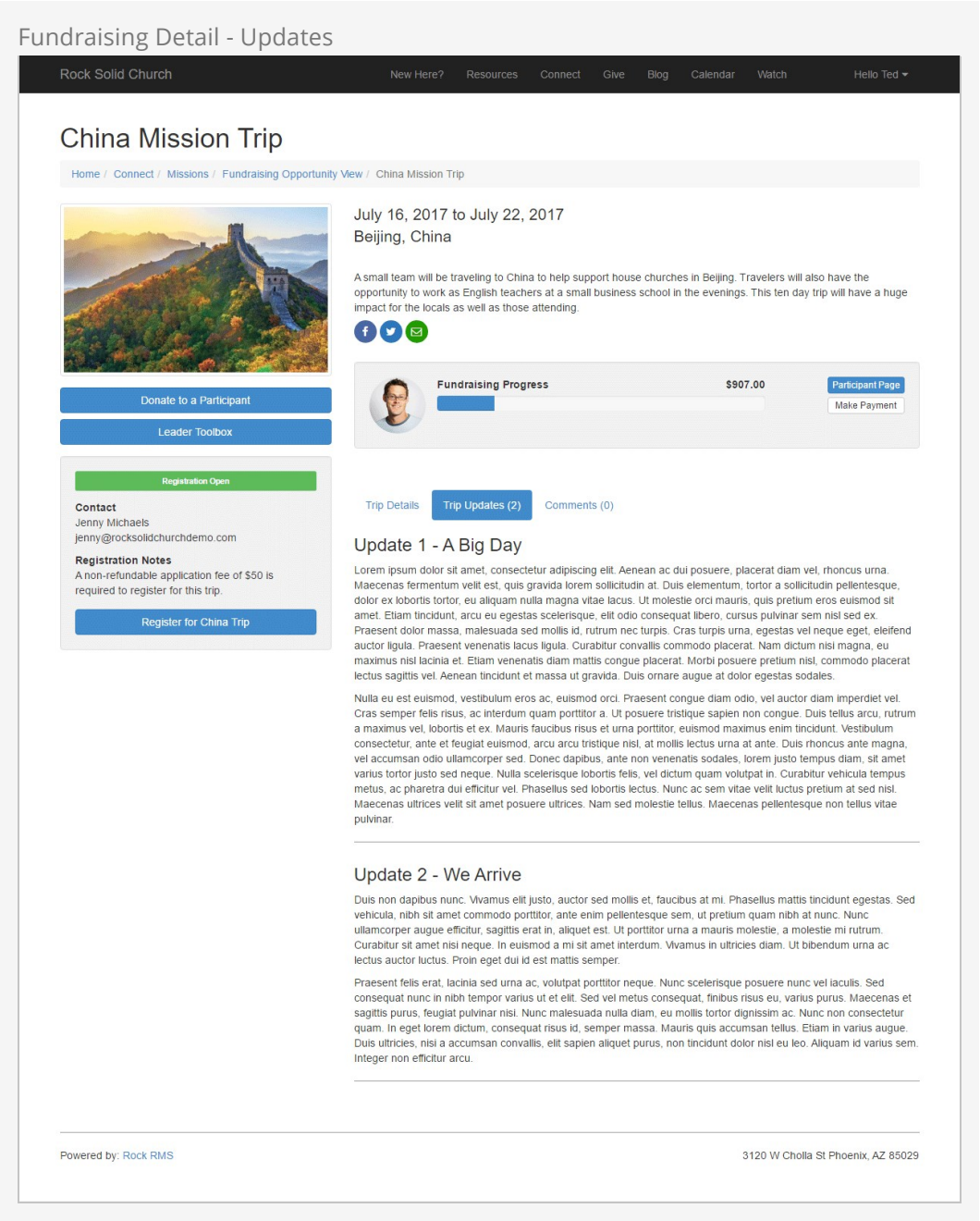
Selecting one of the opportunities will take you to its detail page. In the example below, Ted (who is leading this particular mission trip) is viewing the page. Since we know it's Ted, a summary of his Fundraising Progress is shown. Links are also displayed to take him to his participant's page and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



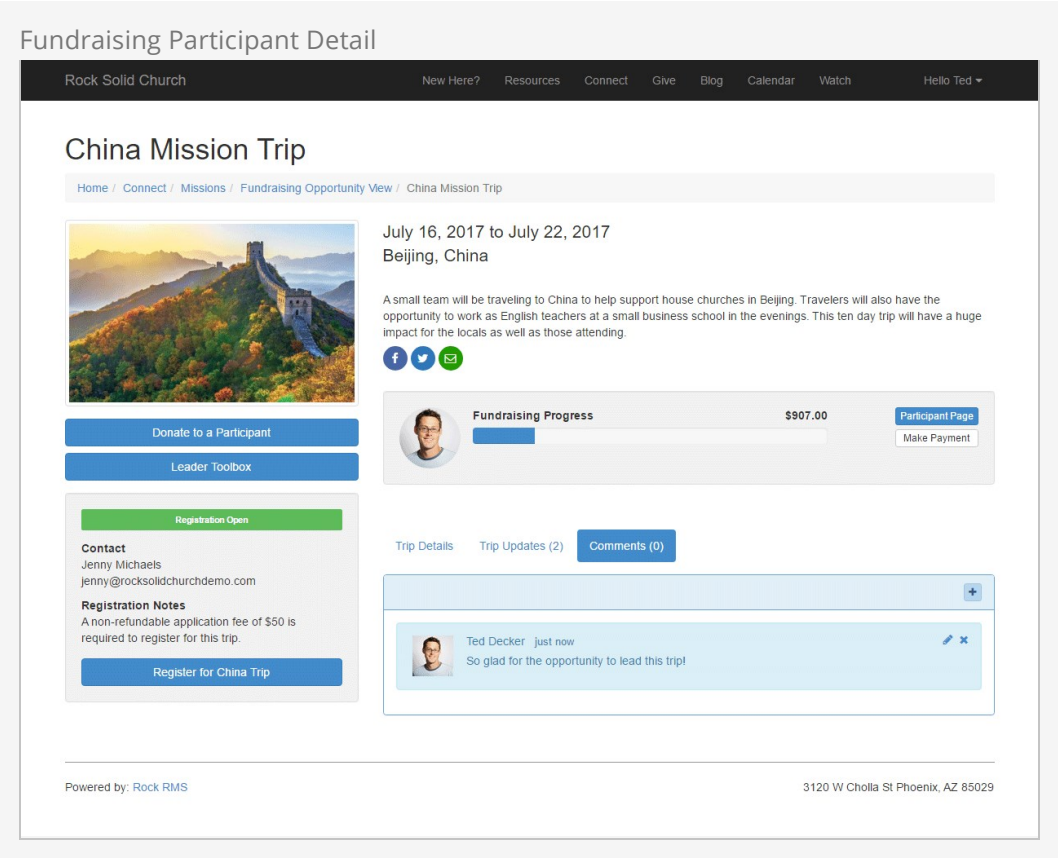
This page is also used for the general public to view. It allows them to easily register for the opportunity if a registration instance was provided.



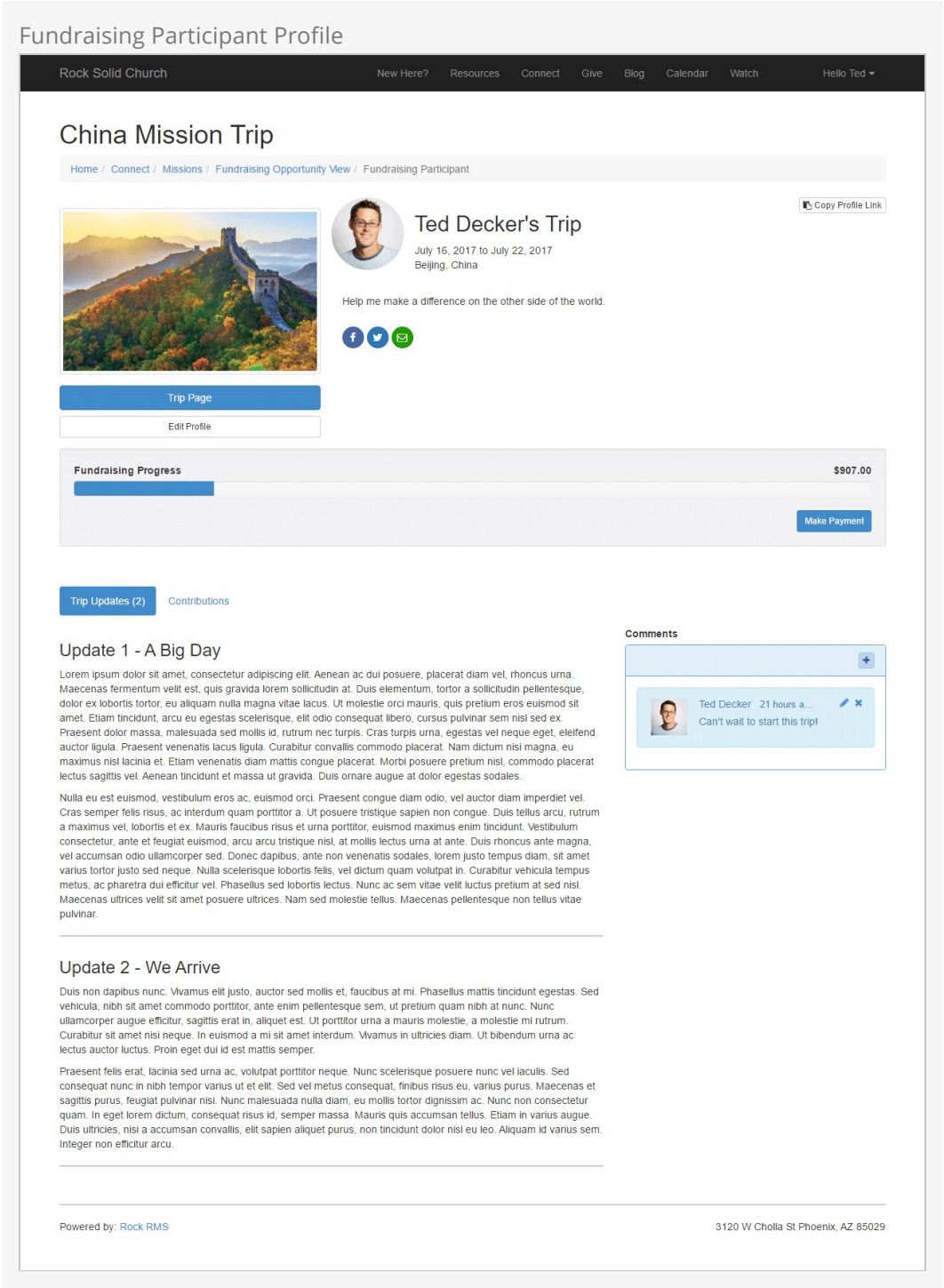
Fundraising Opportunites can also optionally be configured with a Content Channel for providing updates. When configured, a new tab will be shown to display these updates.



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

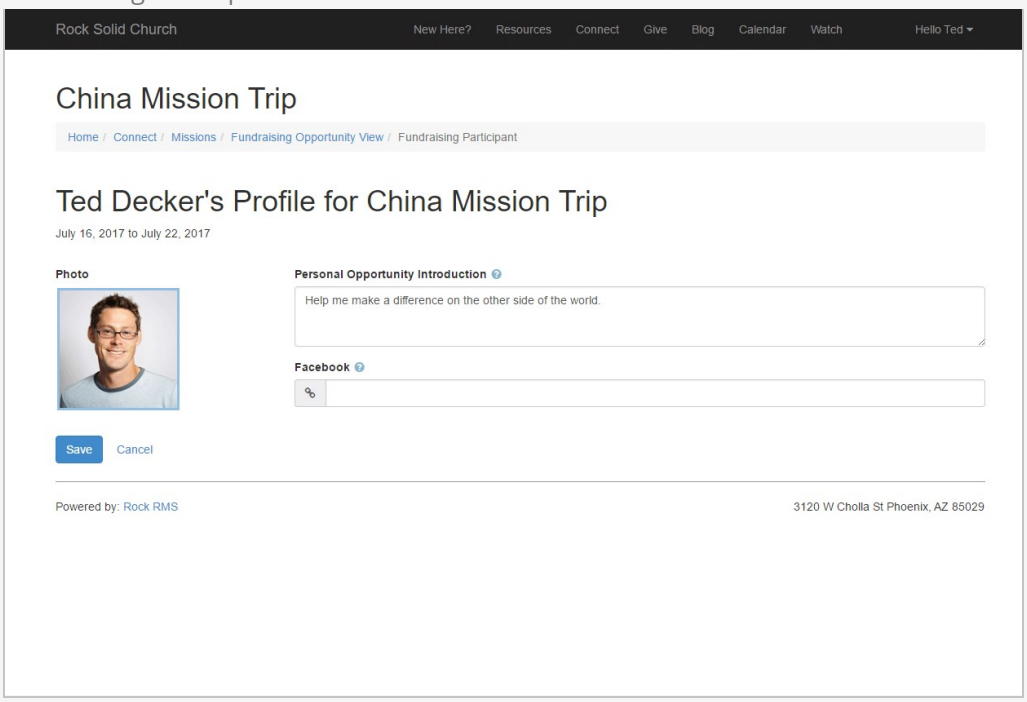


Each opportunity participant has a personalized page that they can share with others to help generate interest and help encourage funding.



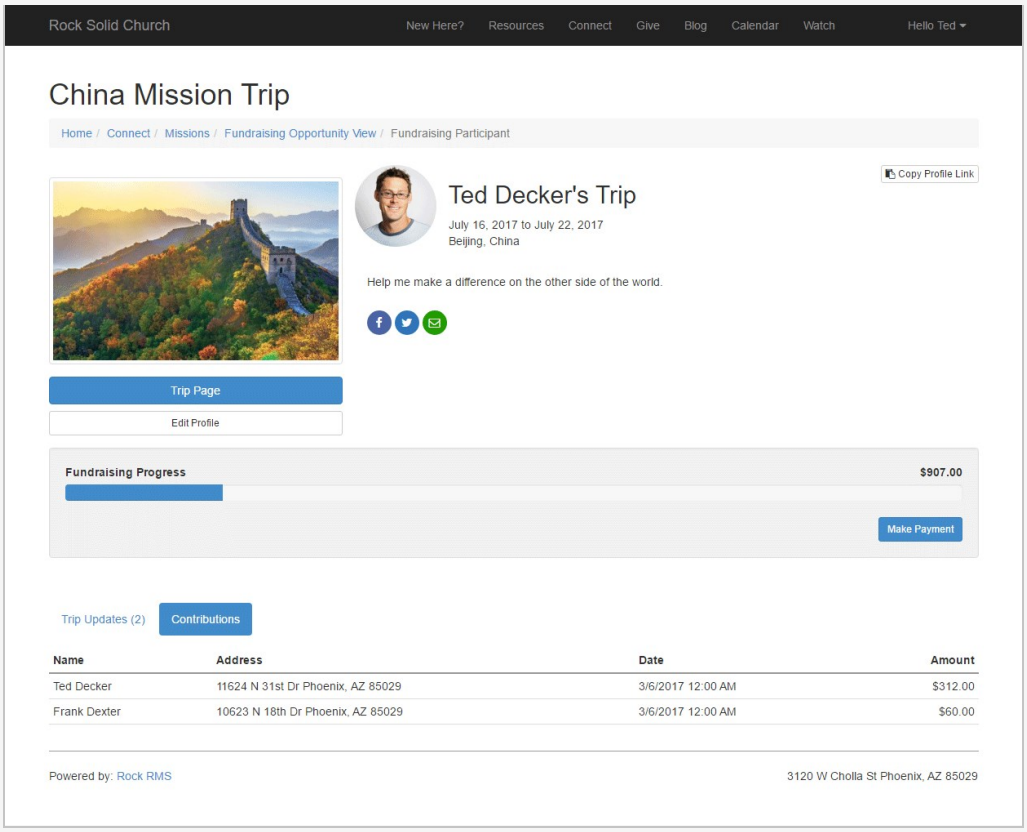
Each participant can provide a custom opportunity introduction and edit their profile image from their personalized page. This block can also be configured to edit specific person attributes if you wish.

Fundraising Participant Profile

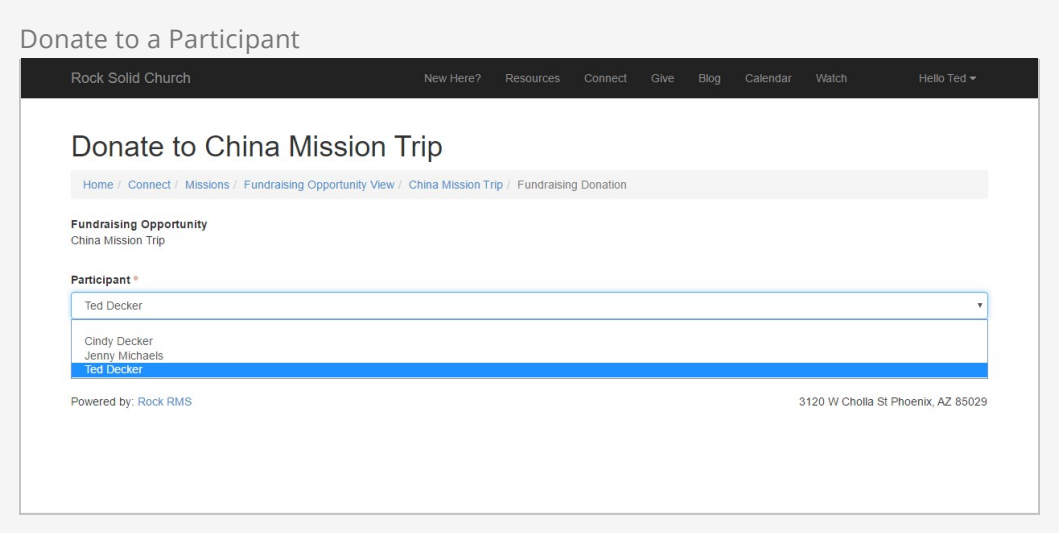


If the person logged in is the participant, they can also view the gifts that have been given.

Fundraising Participant Transactions



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



Fundraising Opportunity Configuration

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

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

Group Attributes

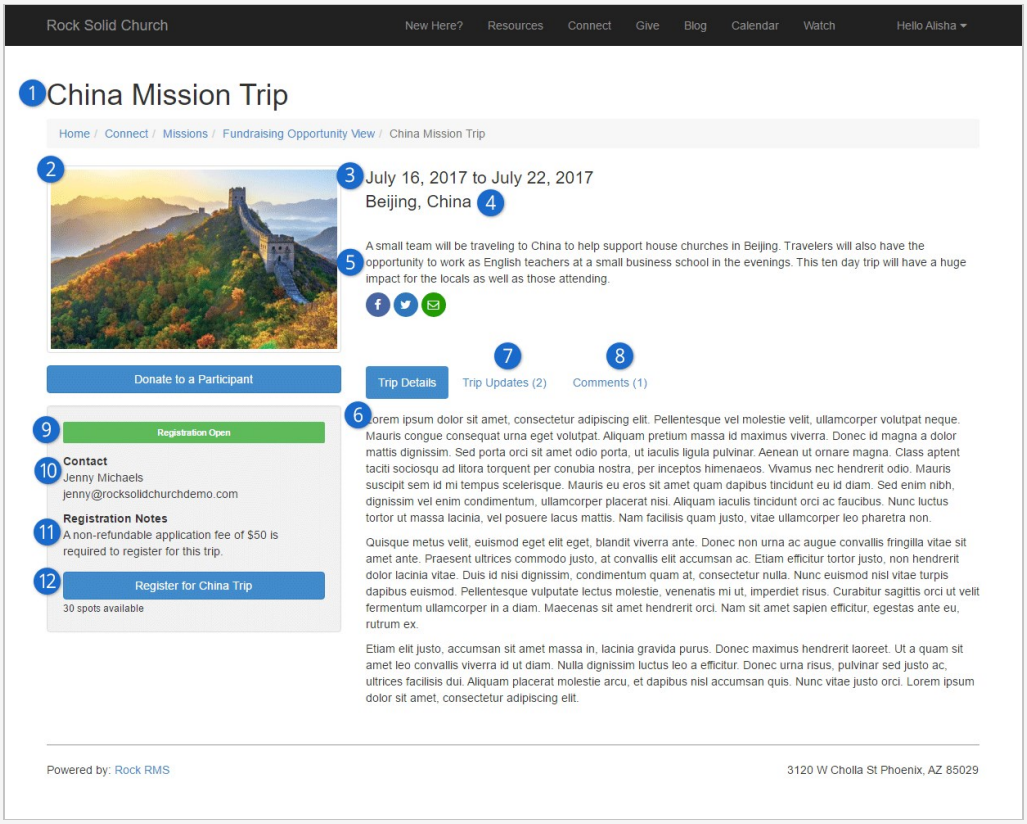
Below is a detailed discussion of each setting for the group that represents the opportunity (Mission Trip, Internship Season, etc.)

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

Name	Type	Description
Photo		include one.
Opportunity Details	HTML	Now we get to the nitty-gritty of what this opportunity is all about.
Individual Fundraising Goal	Currency	This field determines how much money each person is trying to raise. If each person in the opportunity is raising different amounts, you can provide those unique amounts on their group member attribute (discussed below).
Opportunity Type	Defined Value	The opportunity type helps group-like opportunities. Rock ships with three options (*Trip*, *Internship* and *Project*). You can add your own under `General Settings > Defined Types > Fundraising Opportunity Type`. This setting has two roles: • Acts as a filter for opportunities on the external website (e.g. show only mission trips on this list) • Provides a label to describe the opportunity type. For instance, should this opportunity be referred to as a *Trip*, *Project*, etc.
Update Content Channel	Content Channel	You may want to provide updates on the status of your opportunity. For example, if your opportunity is a mission trip, you might want to file trip reports. Or if it's a project, you might want to provide updates on the overall funding level or project status. This setting allows you to configure a content channel to manage these updates. If you don't provide a channel the updates tab will be hidden.
Enable Commenting	Boolean	Sometimes you want comments, sometimes you don't. When enabled, a notes block will be added to the opportunity detail. Just remember that there is no automatic email when new notes/comments are left and no approval process. These features may be added in a future release.
Registration Instance	Number	This is what ties in a registration to the fundraising opportunity. You must provide the registration instance ID (currently there isn't a registration instance picker).
Registration Notes	Memo	This short description will show up on the opportunity details page to provide any quick notes about the registration (e.g. *A $200 deposit is required*).
Allow Individual Disabling of Contribution Requests	Boolean	Opportunity participants can have their own personalized fundraising pages. Some participants may want to use this page to share the opportunity and provide updates, but not want to communicate the financial needs. This setting allows you the option to allow them to disable the sharing of their funding status.
Allow	Boolean	This allows individuals to set their own fundraising goals

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

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



1. **Opportunity Title**
2. **Photo**
3. **Date Range**
4. **Location**
5. **Summary**
6. **Details**
7. **Trip Updates**
8. **Comments**
9. **Registration Status**
   This is determined by looking at the dates on the registration instance. If the registration is not yet open, the future opening date will be displayed.
10. **Registration Contact**
    The contact comes from the Registration if it is configured.
11. **Registration Note**
12. **Spots Available**
    This is calculated by looking at the number of registrant openings available for the registration.

Group Member Attributes

The following group member attributes are available to help configure the

opportunities.

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

Fundraising Financial Transactions

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

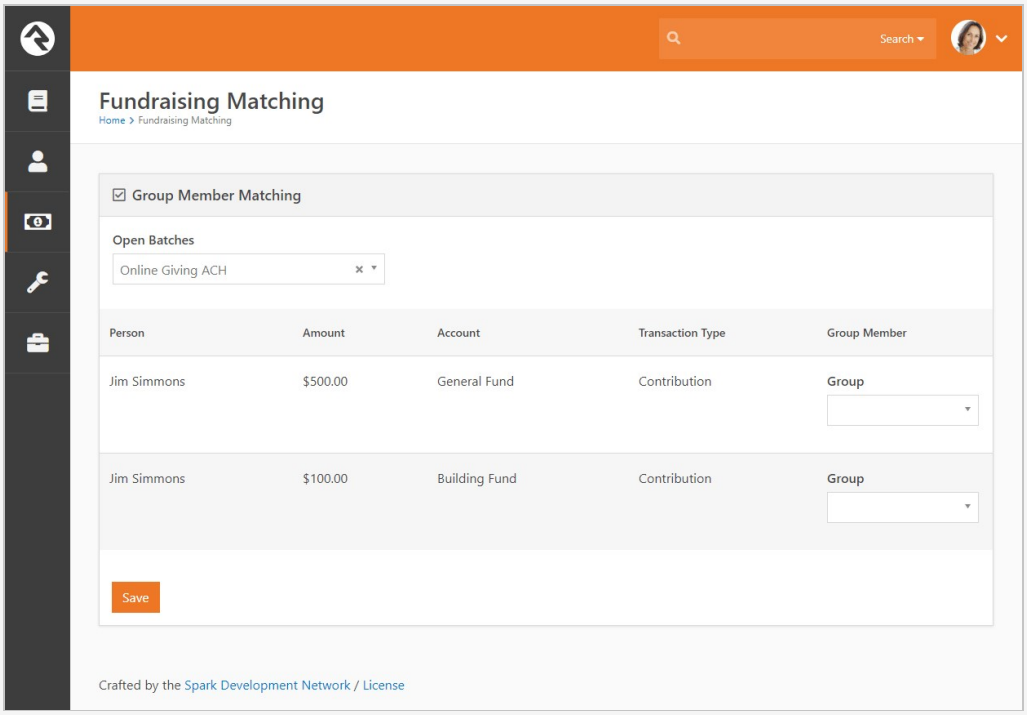
In Rock, financial transactions can be tied to another entity (event registration, etc.). Donations that are made as a part of fundraising will be tied to the *Group Member* of the *Fundraising Opportunity* group. The is no financial linkage to registrations. This is an important point to understand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

Financial Transactions Matching

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

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

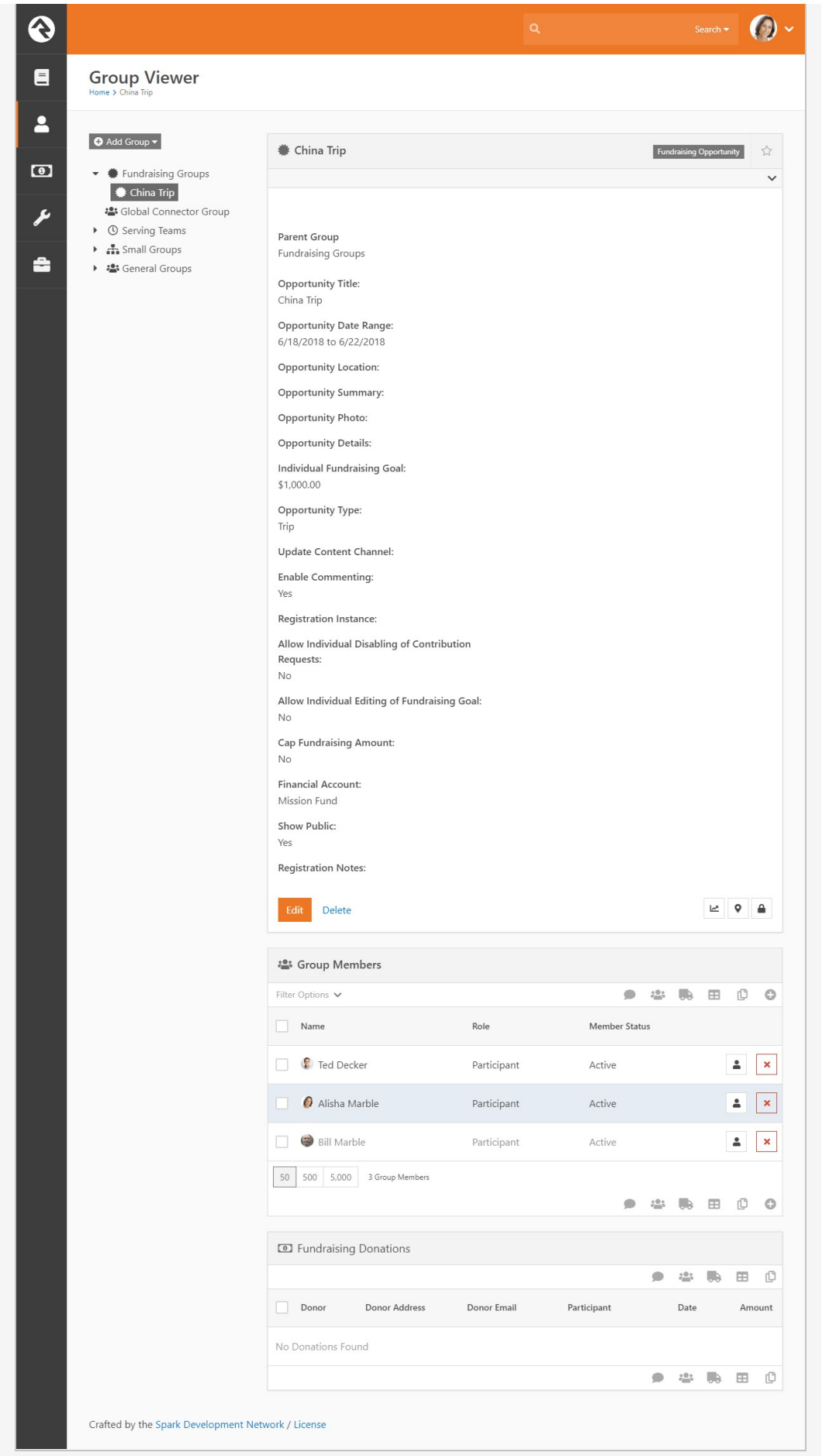
Donate to a Participant



Fundraising Progress

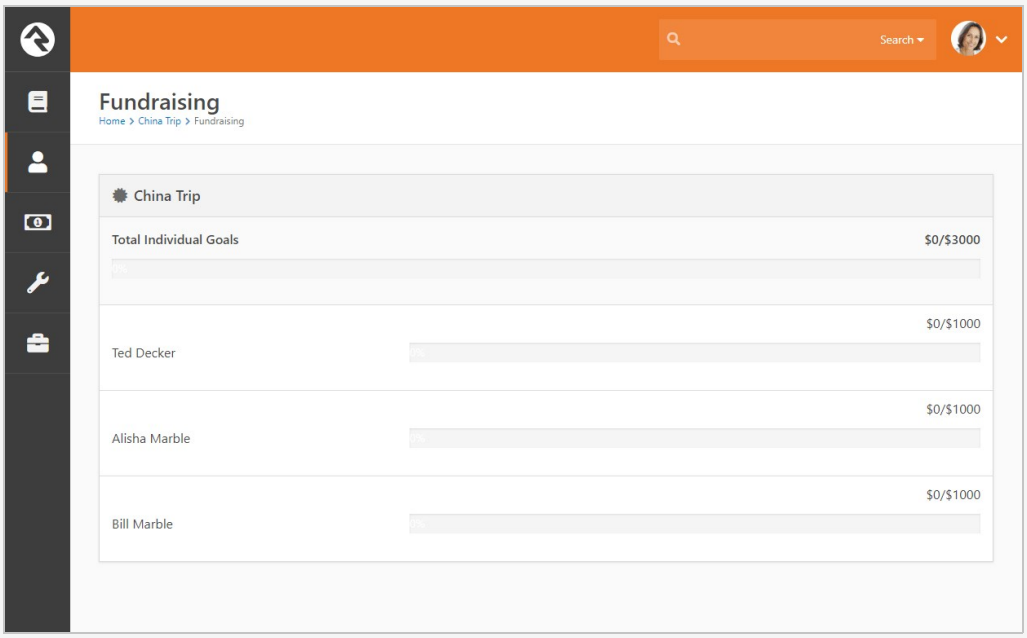
You can quickly track the progress of fundraising campaigns for fundraising groups. Start by going to the *Group Viewer* page (`People > Group Viewer`). From this screen you can view the individual fundraising donations for each group member.

Fundraising Group


Search
Group Viewer
Home > China Trip
Add Group
Fundraising Groups
China Trip
Global Connector Group
Serving Teams
Small Groups
General Groups
China Trip
Fundraising Opportunity
Parent Group
Fundraising Groups
Opportunity Title:
China Trip
Opportunity Date Range:
6/18/2018 to 6/22/2018
Opportunity Location:
Opportunity Summary:
Opportunity Photo:
Opportunity Details:
Individual Fundraising Goal:
$1,000.00
Opportunity Type:
Trip
Update Content Channel:
Enable Commenting:
Yes
Registration Instance:
Allow Individual Disabling of Contribution Requests:
No
Allow Individual Editing of Fundraising Goal:
No
Cap Fundraising Amount:
No
Financial Account:
Mission Fund
Show Public:
Yes
Registration Notes:
Edit
Delete
Group Members
Filter Options
Name
Role
Member Status
Ted Decker
Participant
Active
Alisha Marble
Participant
Active
Bill Marble
Participant
Active
50
500
5,000
3 Group Members
Fundraising Donations
Donor
Donor Address
Donor Email
Participant
Date
Amount
No Donations Found
Crafted by the Spark Development Network / License

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

Fundraising Progress



How Registration Can Work with Fundraising

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

Basic Mission Trip

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

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

Mission Trip with No Cost Application Process

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

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

Mission Trip with Required Costs Paid by the Participant

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

Group RSVP

If you're hosting an event, class or other type of gathering, it can be very important to know how many people plan to attend. The expected attendance can impact things like the location, the refreshments and even how many chairs you'll need. Those are just some of the reasons why Rock comes with an RSVP system that lets you track whether invitees actually plan on attending your function.

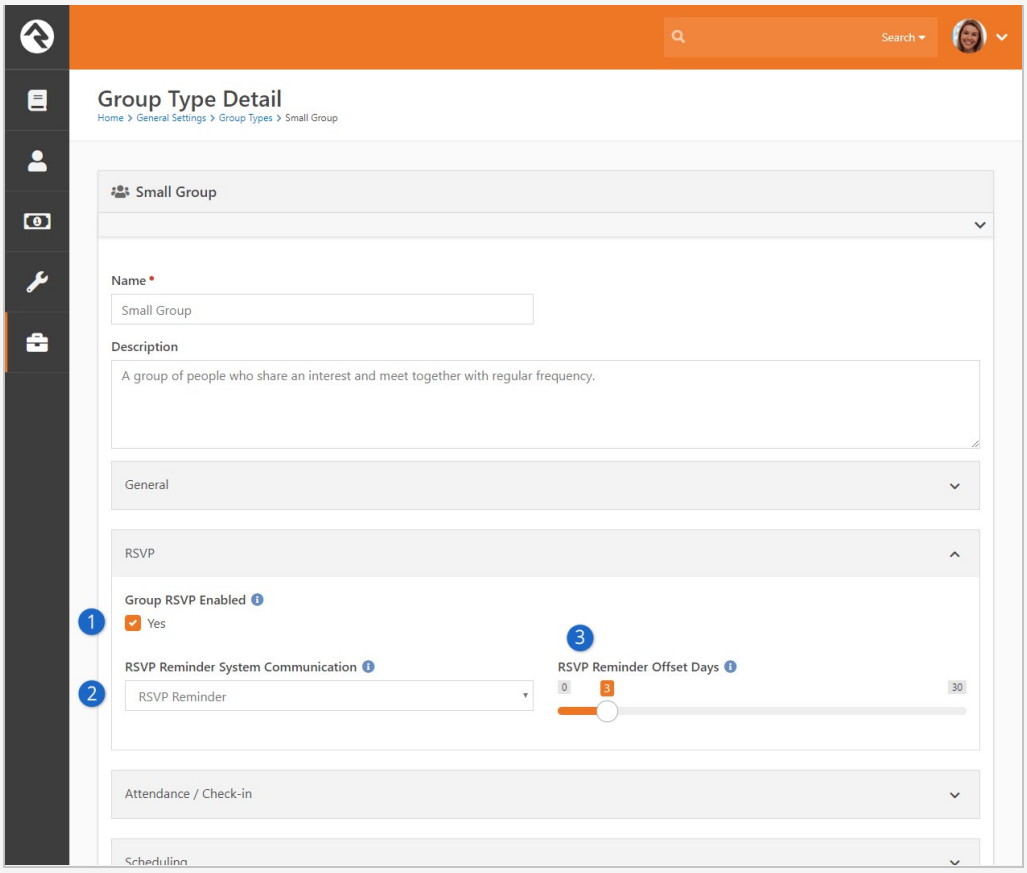
If this brings Rock's event registration features to mind, you're not too far off. You already know how robust and flexible event registration features can be, but sometimes it might be a little more than you need. Group RSVP is for when you just need to know who's coming, plain and simple.

Enable Group RSVP

The RSVP function is enabled in group type settings, making RSVP features available to any groups within that type. All RSVP features are tied directly to a group. That means you must have a group created before you can use RSVP. The group doesn't need to have any members, but it needs to exist so individuals who accept your RSVP can be added to it.

To enable RSVP for a group type, navigate to `Administration > General Settings > Group Types` and open the RSVP settings for the group type.

Enable Group RSVP



1. **Group RSVP Enabled**
   This checkbox must be selected to access RSVP features for any group of this type. Once enabled, the other two fields related to RSVP will appear.

2. **RSVP Reminder System Communication**
   Select the System Communication that should be used to send reminders to invitees who have Accepted. Only communications in the "RSVP Confirmation" category will be available for selection. The selected communication will automatically be used with all groups of this type.

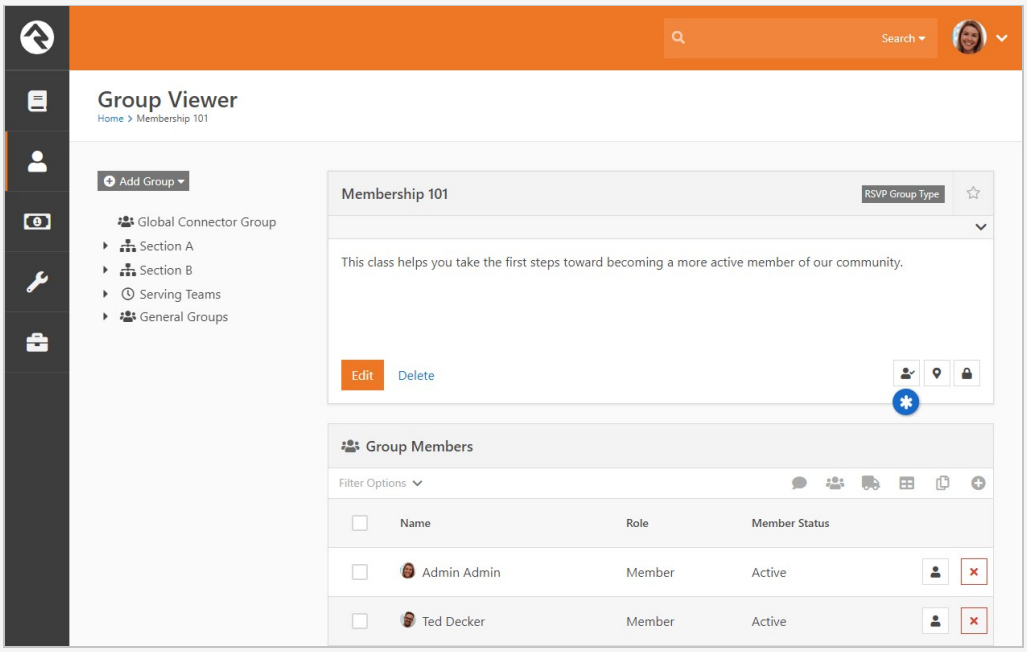
3. **RSVP Reminder Offset Days**
   Indicate how many days before the event the reminder should be sent. Like the communication selection, you won't be able to change the offset days for individual groups if you set a value here. All groups of this type will inherit the offset days set at the group type level.

RSVP - Group Viewer

After you've enabled RSVP for a group type, you'll see a couple of changes when viewing groups of that type from the *Group Viewer* page.

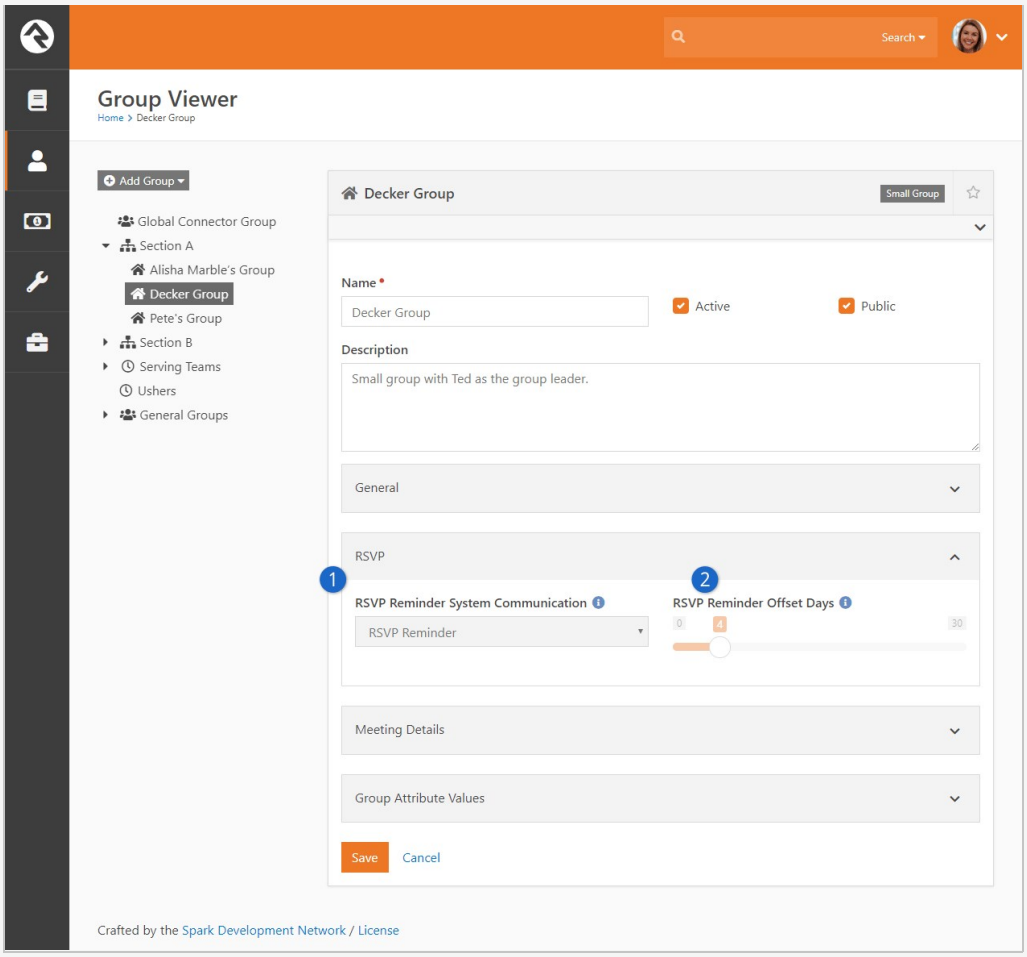
First, you'll notice the addition of a new icon that will take you to the *Group RSVP List* page, where you can view or add occurrences. We'll talk more about occurrences in the RSVP Occurrences section below.

Group Viewer With RSVP



Second, you can `Edit` a group to access the *RSVP Reminder System Communication* and *RSVP Reminder Offset Days* for that group. These settings are only available for groups where RSVP has been enabled on the group type.

Group Viewer RSVP Reminder Settings



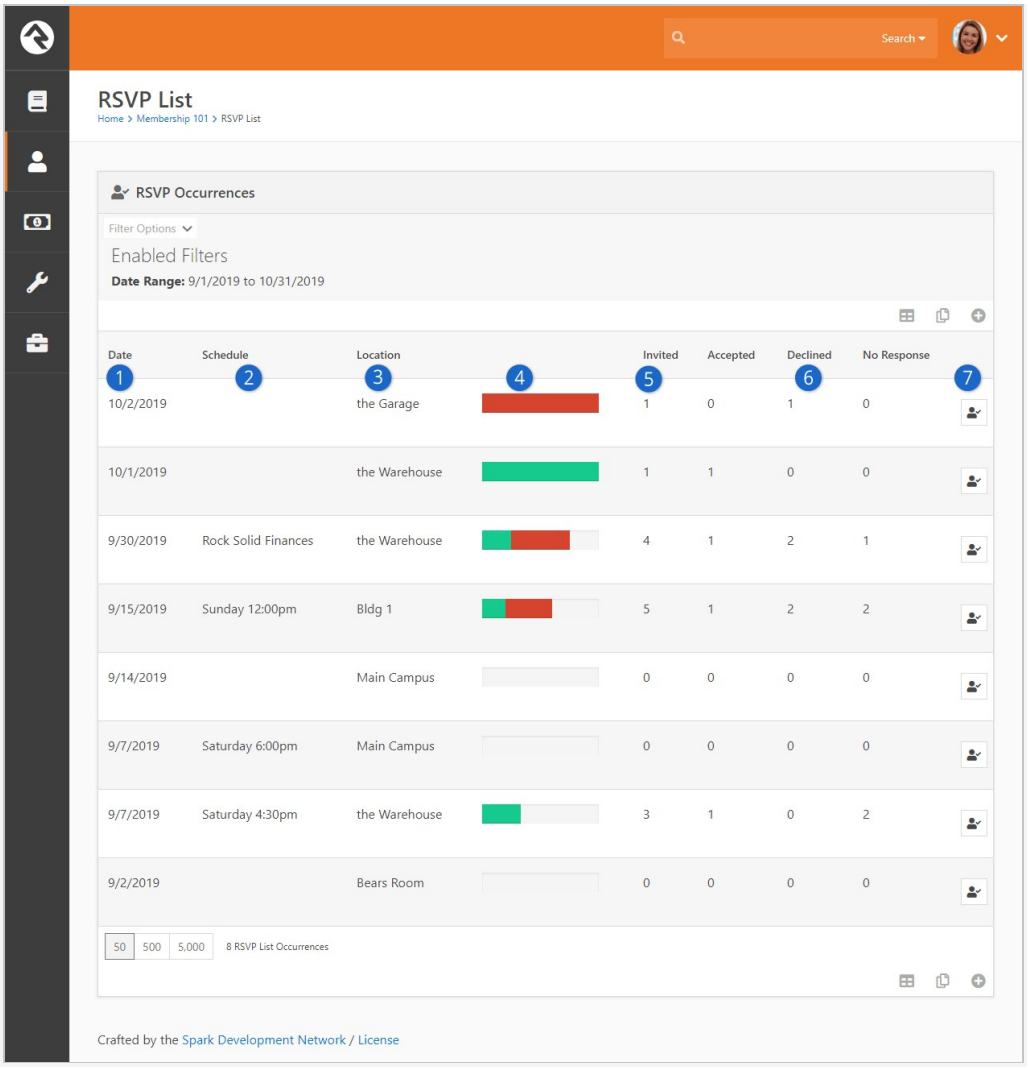
1. **RSVP Reminder System Communication**
   Select the *System Communication* that should be used to send reminders to invitees who have *Accepted*. Only communications in the "RSVP Confirmation" category will be listed for selection. If you already set this at the group type level then you won't be able to change it here.

2. **RSVP Reminder Offset Days**
   Indicate how many days before the event the reminder should be sent. Like the communication selection, you won't be able to change the reminder settings for individual groups if they're already configured for the group type.

Group RSVP List

Clicking the icon takes you to the *Group RSVP List* page. It will be empty when you first start, but after you add a few occurrences to the list (see RSVP Occurrences) you'll quickly see how useful this page is. Let's take a look.

RSVP List Page



1 **Date**
The date of the occurrence is shown in the first column. You can use the *Filter Options* near the top of the block to narrow the list by date.

2 **Schedule**
The check-in schedule associated with the occurrence, if applicable, is shown here.

3 **Location**
If a location has been assigned to the occurrence you can see it here.

4 **Response Progress Bar**
This column gives you a graph of RSVP response data:

- Green = Accepted
- Red = Declined
- Blank/Gray = No Response

5 **Invited**
You can view the count of all invitees for the occurrence, so you know how many people were invited.

6 **Response Statistics**
In this part of the block you can see how many people have replied to the RSVP with either an Accept or Decline, and a count of how many haven't

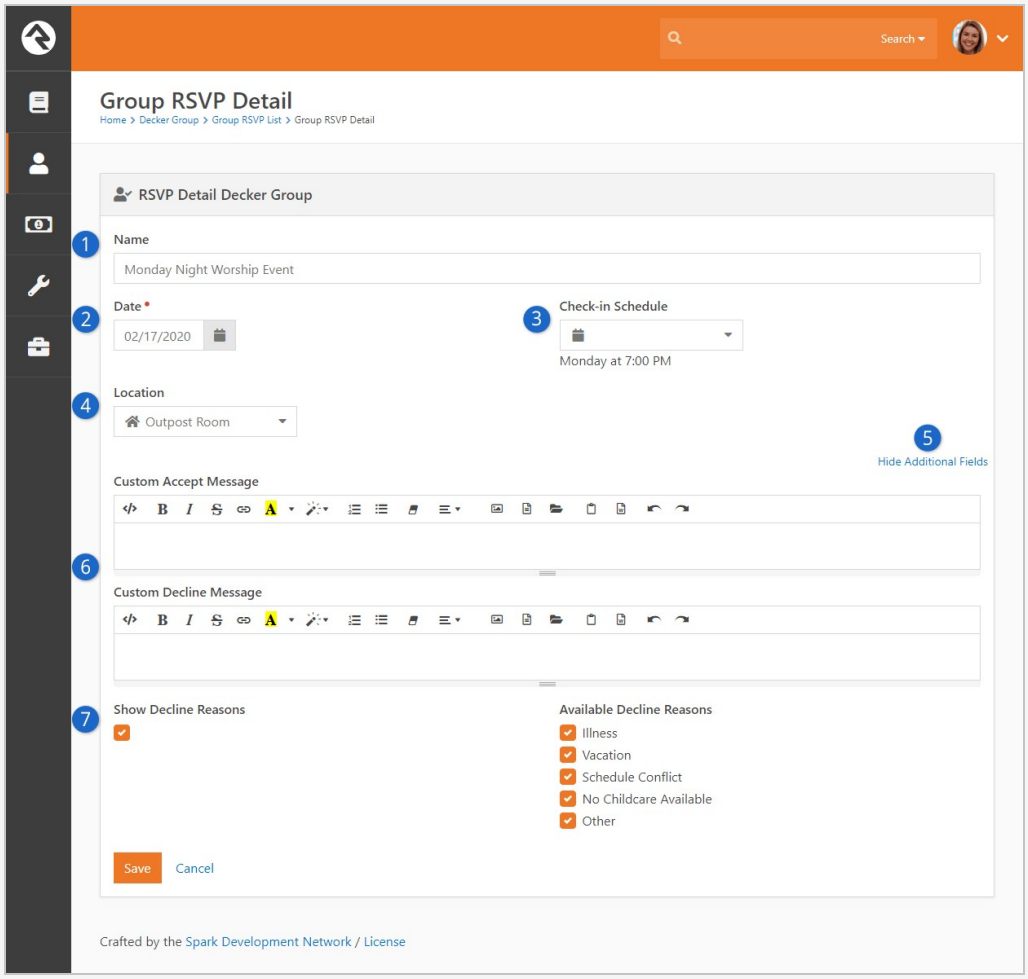
responded.

7 **RSVP Detail Icon**
Click the icon to access the *RSVP Detail* page (see RSVP Detail).

RSVP Occurrences

Let's look at how to add an occurrence to the RSVP List. You'll need to have at least one occurrence set up for the group before you can start sending your RSVP emails.

Add Occurrence



1 **Name**
You can optionally set a unique name for an occurrence. This applies only to the occurrence being viewed. Invitees will see the name you provide on the external website when they *Accept* or *Decline*.

2 **Date**
Set the date of the occurrence.

3 **Check-in Schedule**
Choose the check-in schedule associated with the occurrence, if applicable.

4. **Location**
   Select the location of the occurrence.
5. **Show/Hide Additional Fields**
   Click *Show Additional Fields* to reveal the settings for custom messages and decline reasons (listed below).
6. **Custom Accept/Decline Messages**
   You can customize the message invitees see when they respond to your RSVP request. We'll show you what that looks like in the Responding to RSVP Requests section.
7. **Show Decline Reasons**
   If the *Show Decline Reasons* box is selected, then invitees can give a reason for declining. You can choose which reasons are available to invitees from the list of *Available Decline Reasons*.

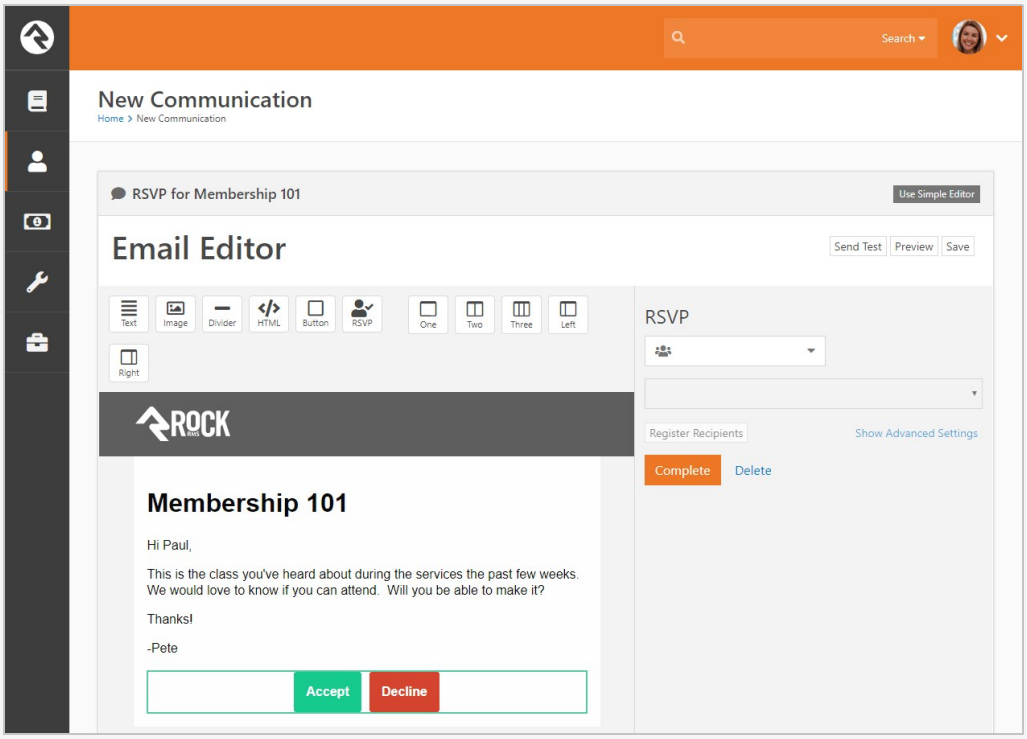
> **Decline Reasons**
> The list of *Available Decline Reasons* can be maintained from the `Admin Tools > General Settings > Defined Type` list under *Group RSVP Decline Reason*.

RSVP Email Requests

Now that we have an occurrence set up, we're ready to send out some invitations.

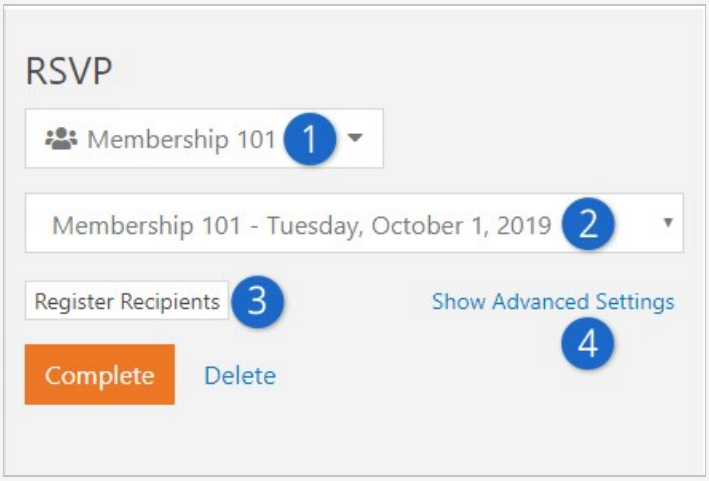
Adding an RSVP request to an e-mail is as simple as clicking and dragging the RSVP tool button (look for the icon) into your email. If you're not sure how to get to this point, check out the Communication Wizard section in the `Communicating With Rock` guide.

Add RSVP To New Communication



After the RSVP buttons have been added to the body of your email, use the panel on the right to select the group and occurrence.

Add Occurrence to Email



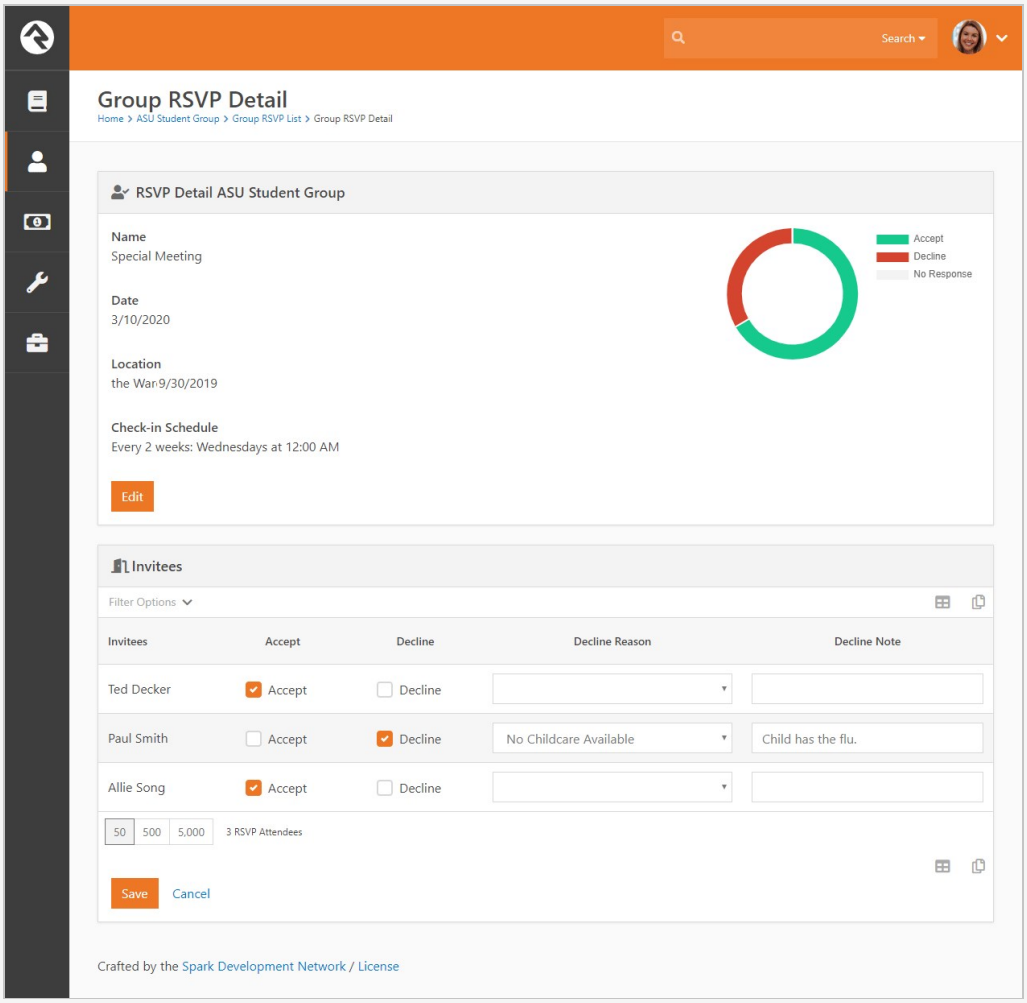
1. **Select Group**
   Choose the group associated with the occurrence. Only group types with RSVP enabled will be in the list of options.
2. **Select Occurrence**
   Pick the occurrence for which you want to send an email. The RSVP responses you receive will be for this occurrence.
3. **Register Recipients**
   Click the `Register Recipients` button to keep track of RSVP data for all the recipients of your email. If this button isn't used, only people who have responded to your RSVP request will appear in the *RSVP List* or *RSVP Detail* pages.
4. **Show Advanced Settings**
   You can use the advanced settings to customize how the RSVP buttons are shown to invitees.

RSVP Detail

Now that we've sent our email, we need to monitor the responses. We'll do this from the *RSVP Detail* page, which you can get to by clicking an occurrence from the *RSVP List* page.

The detail block at the top of the *RSVP Detail* page shows the occurrence details and a graph of responses. The list block at the bottom of the page shows your invitees and their responses.

RSVP Detail Page



Not only can you view responses, but you can also update responses or add decline notes if you need to. This ensures you always have accurate information, especially if the invitee responds (or changes their response) by phone or in person.

If you didn't turn on the *Show Decline Reasons* option for the occurrence, then the *Decline Reason* and *Decline Note* columns won't be shown.

> **Missing Invitees?**
>
> If you used the `Register Recipients` button when sending your email, then everyone from your email will be on this list. Otherwise you'll only see people who have responded.

Responding to RSVP Requests

It may be helpful for you to know what individuals will be seeing and doing after they receive your RSVP email.

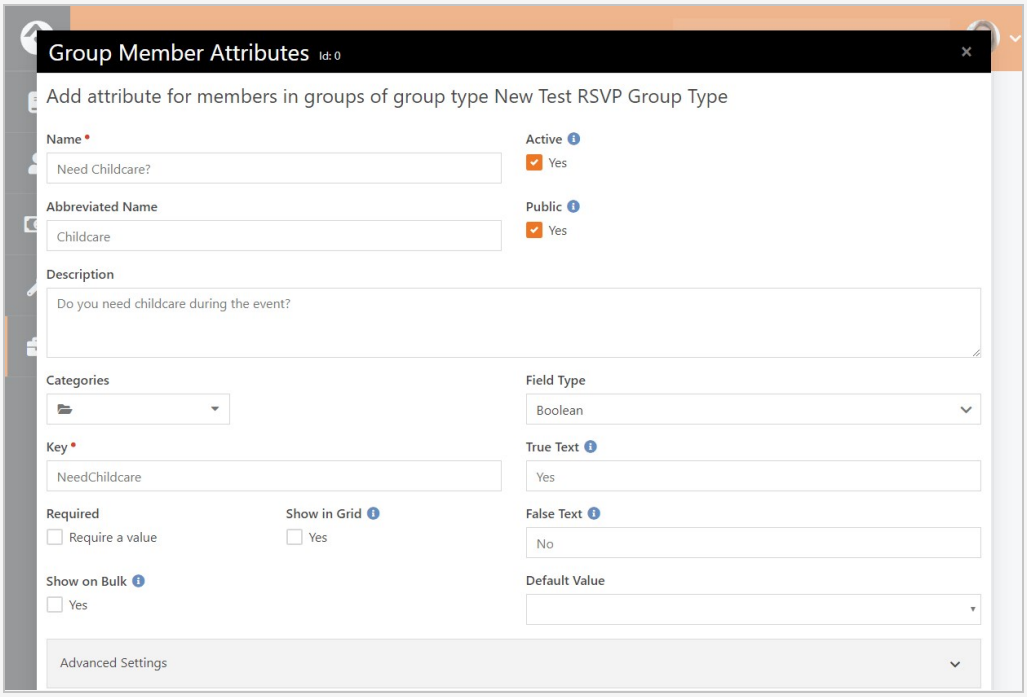
Clicking either Accept or Decline in the email will bring the invitee to your external site. What happens at that point depends on how you've set up your group, occurrence and

email.

Public Group Member Attributes

When adding a member attribute to either a group or group type, you'll notice a *Public* setting. This setting controls whether the member attribute is included as part of the RSVP response process.

Enable Public Attributes



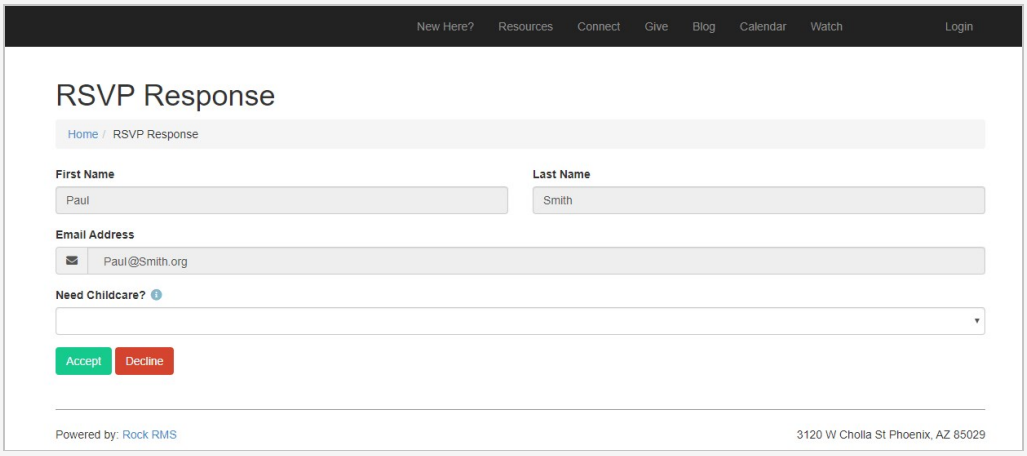
If the *Public* setting is enabled, then the group member attribute will be shown to RSVP invitees who accept your invitation. This allows you to gather additional information from the invitee beyond knowing that they plan to attend. We'll show you exactly what this looks like in the Accept section below.

Accept

Invitees will be taken to your website after clicking "Accept" in the RSVP email they received. If you've attached any public member attributes to your group, then invitees will be asked to provide additional information (i.e. attribute values) accordingly.

For example, the *RSVP Response* page pictured below has a field labeled "Need Childcare?" with a drop-down menu below it. This prompts the individual to disclose if they need childcare before finalizing their RSVP acceptance. You can see how this particular member attribute was set up in the Public Group Member Attributes section above.

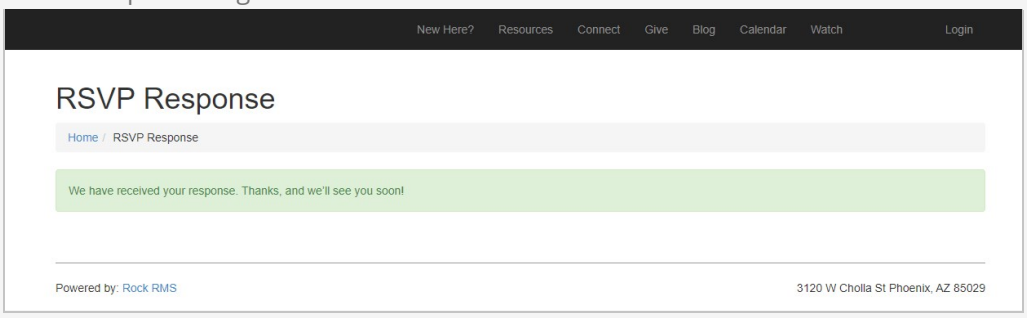
RSVP Accept With Attribute



After the invitee clicks the `Accept` button on the page pictured above, they'll be brought to the acceptance confirmation page pictured below.

If you didn't add any public member attributes to your group, then the above page is skipped because there is nothing else the invitee needs to provide. Instead, invitees will be taken directly to the acceptance confirmation page pictured below when they click "Accept" from the RSVP email.

RSVP Accept Message



The generic acceptance message pictured above can be customized if desired (see RSVP Occurrences).

> **Accepts Become Group Members**
>
> Rock will always add a person who accepts the RSVP into the group as a group member. This is especially needed when, for example, group member attributes are used. If an individual declines the RSVP invitation they won't be removed from the group.

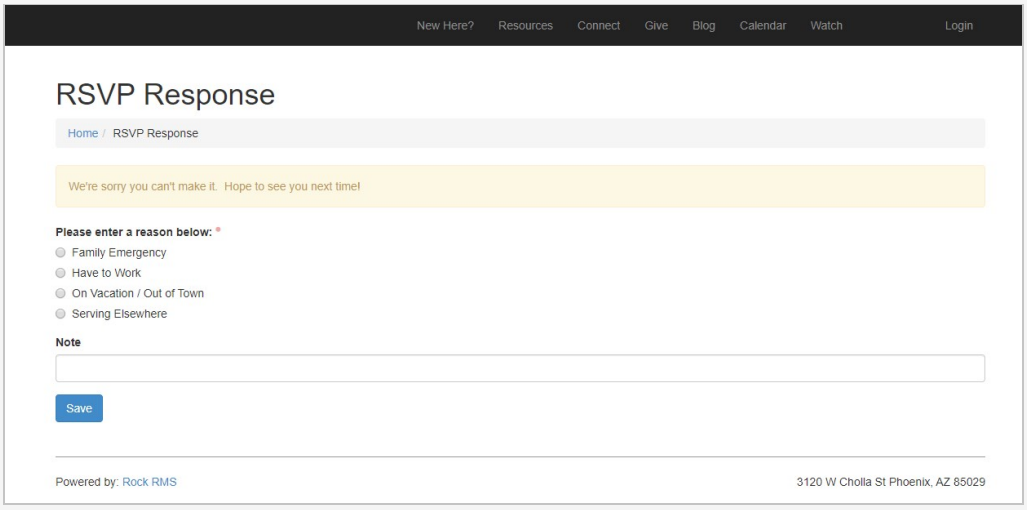
Decline

Just like clicking Accept, you control what happens when a person clicks Decline.

If the person declines, and if you enabled decline reasons, then they'll be asked to

provide a reason.

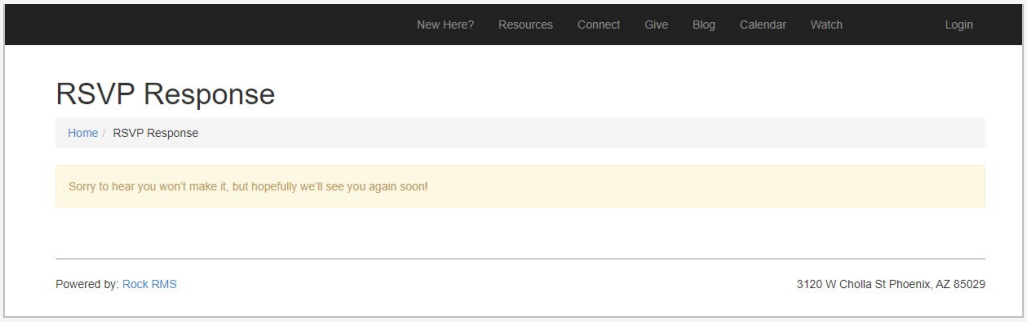
RSVP Decline With Reason



In the above example a custom decline message is displayed near the top of the block. If you didn't customize your decline message then the generic message (pictured below) will appear instead.

If you didn't enable decline reasons, then the invitee will be taken directly to the page below from the email.

RSVP Decline Message



Group RSVP Reminders

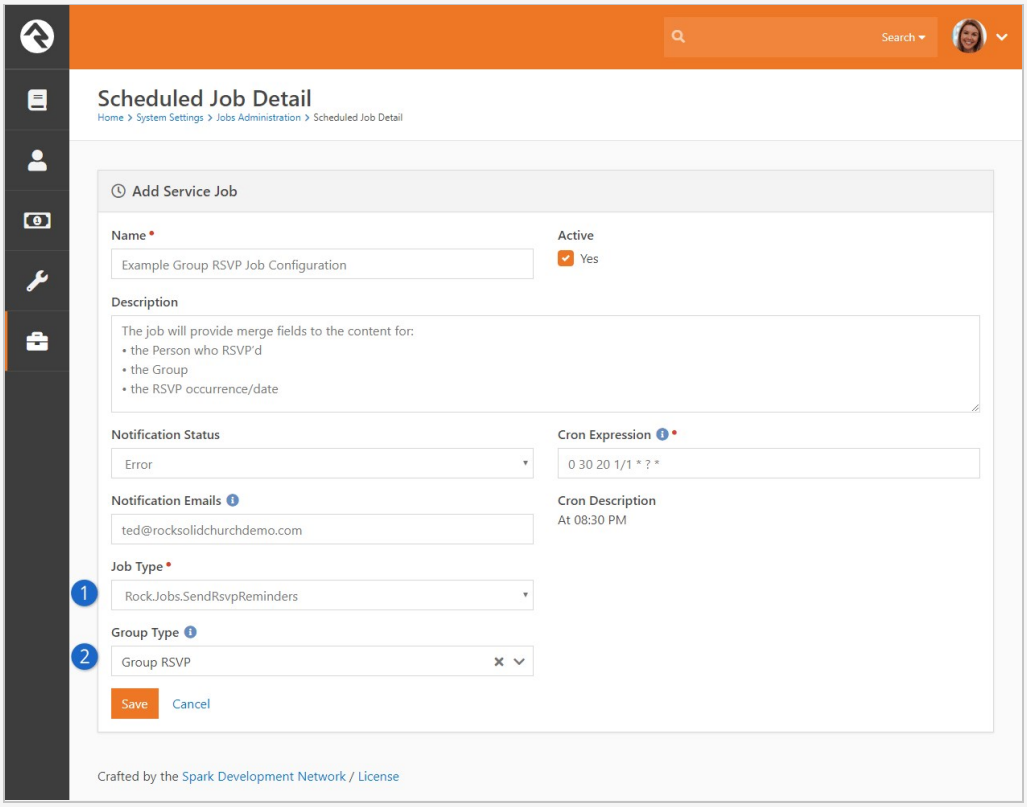
The *SendRsvpReminders* job will send a reminder to people who have *accepted* an RSVP invitation. Those who have declined or who haven't responded won't receive a reminder.

The job is ready for you to use out of the box, but it must be manually configured and is intended to be run daily. It will use the *RSVP Reminder System Communication* for the content, as configured at either the group or group type level. If you haven't selected a *System Communication* to use, then the job will not send a reminder.

Sending Reminders using SMS

If a person's communication preference is SMS, and if the *System Communication* you use for RSVP reminders is fully configured for SMS, then the reminder will be sent as a text instead of an email.

Group RSVP Reminders Job



1. **Job Type**
   For RSVP reminder communications, be sure to select the *SendRsvpReminders* job as pictured above. You'll then be prompted to select a group type.

2. **Group Type**
   The *SendRsvpReminders* job will attempt to send reminders for all group types if one is not specified here. Otherwise you can pick a group type if you only want to send reminders for groups of that type. In most cases you'll probably want to configure a single job, without picking a group type, for all of your reminders. You can create multiple jobs if needed, but be sure every instance of the job has its own group type specified or you risk sending duplicate communications.

Don't forget that the *SendRsvpReminders* job will reference the configured *RSVP Reminder Offset Days* value (either from the group type or for a particular group) to determine when to send reminders for any given occurrence.