


PERSON & FAMILY FIELD MANUAL



A PRACTICAL GUIDE FOR MANAGING PEOPLE



Welcome

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

We Are Family

Every person in the database belongs to one core *Group Type* called Family. You can't add a person without first adding a family. An individual isn't limited to membership in a single family. They can belong to more than one, but they will always have at least one. Below we look at some of the other unique things about the family.

Addresses

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

- Home
- Work
- Previous

Adding An Address Type

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

1. Add a new group location type under:

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

Be sure you select the Group | Location Type as there is also a Location | Location Type.

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

Admin Tools > General Settings > Group Types.

From this screen select the *Family* group type and add the new address type under the *General* section.

Campus

If you're a part of a multi-site organization, the campus is also tied to the family. Interestingly, if a person is a member of two families that attend separate campuses, the individual will be tied to two different campuses as well. This is a powerful pattern for blended families to use.

Portrait of a Person

What Makes a Person

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

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

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

- Text
- Date
- Number
- Dropdown of provided values (think of an attribute of T-Shirt Size with the values of S, M, L, XL)
- Boolean (aka, True/False)
- Document

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

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

Note:

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

Adding a Person

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

People > New Family.

Deleting a Person

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

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

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

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

Note:

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

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

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

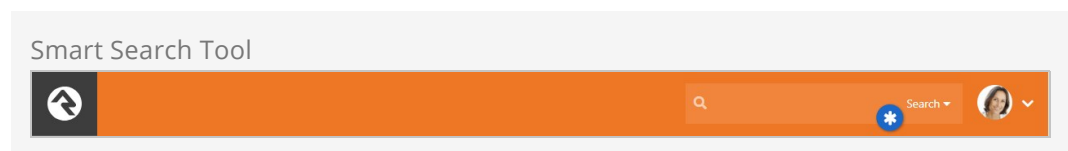
Scenario: You added a test record and now want to delete it.

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

Searching

Searching By Name

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



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

t decker
te dec
decker

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

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

But I'd Like To Search By Only First Name...

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

[System Settings > Search Services > Person Name](#) and enable the *Allow Search by Only First Name* checkbox.

Once you submit your search, you'll see one of two possible screens. If only one user matches your search, you will be taken straight to the *Person Profile* page for that

person. However, if more than one person is returned, you'll see a list of individuals. Select the correct one, and you'll be taken to their *Person Profile* page.

Search Results for 'Decker'

Home > Universal Search

Universal Search

Search

Universal Search

ted decker

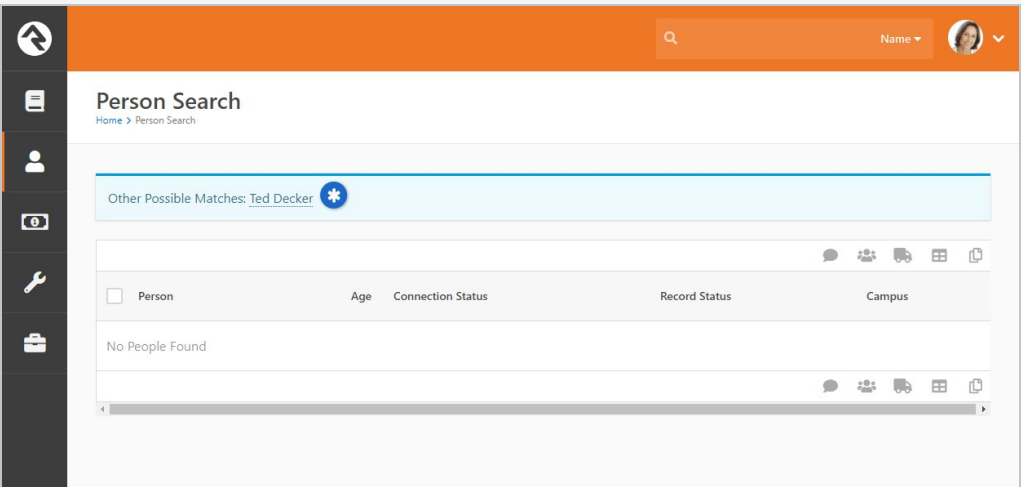
Go

<p>Ted Decker ted@rocksolidchurchdemo.com 11624 N 31st Dr Phoenix, AZ 85029</p>	<p>Connection Status:</p> <p>Member</p>	<p>Age:</p> <p>38</p>	<p>Record Status:</p> <p>Active</p>	<p>Campus:</p> <p>Main Campus</p>
<p>Cindy Decker cindy@fakeinbox.com 11624 N 31st Dr Phoenix, AZ 85029</p>	<p>Connection Status:</p> <p>Member</p>	<p>Age:</p> <p>37</p>	<p>Record Status:</p> <p>Active</p>	<p>Campus:</p> <p>Main Campus</p>
<p>Decker Group (Small Group) Small group with Ted as the group leader.</p>				
<p>Ushers (Serving Team)</p>				
<p>Noah Decker 11624 N 31st Dr Phoenix, AZ 85029</p>	<p>Connection Status:</p> <p>Attendee</p>	<p>Age:</p> <p>10</p>	<p>Record Status:</p> <p>Active</p>	<p>Campus:</p> <p>Main Campus</p>
<p>Alex Decker 11624 N 31st Dr Phoenix, AZ 85029</p>	<p>Connection Status:</p> <p>Attendee</p>	<p>Age:</p> <p>10</p>	<p>Record Status:</p> <p>Active</p>	<p>Campus:</p> <p>Main Campus</p>

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

Other Recommended Results



*** Other Recommended Results**

Searching By Phone

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

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

(623) 555-33
62355533
3322
555 3322

Note:

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

Searching By Email

Yep, you guessed it: Rock can search by email using the *Smart Search* tool, too. Partial searches are supported. We're sure you've got it by now, so we won't repeat the search details here.

Searching By Address

The address search is also similar to the other search types. Keep in mind, though, that

it only operates on the street address portion (first line) of the address. Sample searches for Ted Decker would be:

11624 N 31st Dr

11624

31st Dr

Searching By Birthdate

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

Searching By Group Name

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

Searching By Business

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

Universal Search

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

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

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

Person Profile Page

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

The page can be broken down into four main bars.

Person Profile Page Sections

The screenshot displays the Person Profile page for Ted Decker (Theodore). The page is divided into four main sections, each labeled with an orange line and text on the right side:

- Bio Bar:** Contains the profile picture, name (Ted Decker), member status (Member), main campus (Main Campus), age (39 yrs old), gender (Male), marital status (Married 18 yrs), graduation year (Graduated 1994), and contact information (Home, Mobile, Work phone numbers and email).
- Badge Bar:** Displays various badges and a bar chart.
- Family Bar:** Shows the family members (Cindy, Noah, Alex) and the home address (11624 N 31st Dr, Phoenix, AZ 85029).
- Tabs Bar:** Contains tabs for Person Profile, Extended Attributes, Groups, Contributions, Benevolence, Security, History, and Assessments. Below the tabs are sections for Timeline, Alert: Personal Note, Bookmarked Attributes, and Connection Requests.

Bio Bar

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

Bio Bar

The screenshot shows the Bio Bar section of the Person Profile page for Ted Decker. Numbered callouts (1-9) highlight specific elements:

- 1: Profile picture
- 2: Member status (Member)
- 3: Main Campus (Main Campus)
- 4: Age (39 yrs old)
- 5: Gender (Male)
- 6: Marital status (Married 18 yrs)
- 7: Graduation year (Graduated 1994)
- 8: Contact information (Home, Mobile, Work phone numbers and email)
- 9: Social media icons (Facebook, Twitter, Instagram, Snapchat)

An expanded Actions menu is shown on the right, listing the following options:

- Download vCard
- Background Check (Check)
- Person Data Error
- Photo Request
- Request Assessment

1 Photo

If a photo is available, it is shown here. If no photo is available, a gender/age appropriate silhouette image is shown. Clicking the top left corner of the photo will add the individual to your following list.

2 Labels

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

- **Connection Status:** Member, Attendee, Visitor, Participant, Pending
- **Campus:** Which campus the member's family attends
- **Record Status:** This label is only shown if the record is *Inactive* (e.g., they are no longer attending)

3 Tags

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



4 Demographic Information

This includes age, gender and marital status.

5 Contact Information

This section contains phone numbers and email addresses. Note that if the phone number has SMS enabled you'll see a icon made up of two speech balloons. Also if this page is loaded on a mobile device the phone numbers will appear as links to enable 'Click-To-Call'.

6 Email Address

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

7 Actions

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

8 Edit Link

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

9 Social Media Icons

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

Note About Emails and SMS Phone Numbers

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

Extending the Bio Bar

There are a lot of options available in the *Bio Bar* block settings that allow you to customize the *Person Profile* page. For example, you can use the *Additional Custom Actions* field to add buttons, link to workflows, or add personalized content. You can even add Lava to generate dynamic messages! The possibilities are endless. Be sure to explore these powerful options and consider how you might use them to create a unique profile page that meets the needs of your organization.


Badge Bar


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

Badge Bar

6
3T

1
/16





1 **Attending Duration**

The *Attending Duration* badge shows you how long the individual has been a part of the organization.

2 **16 Week Attendance**

If the family is checking-in their children, this information will be displayed on the *16 Week Attendance* badge.

3 **Family Attendance**

This chart gives you a wider picture of the attendance patterns over the last 24 months. Each bar represents one month. The taller the bar, the more often the family attended that month.

4 **Assessments**

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

5 **Baptism Badge**

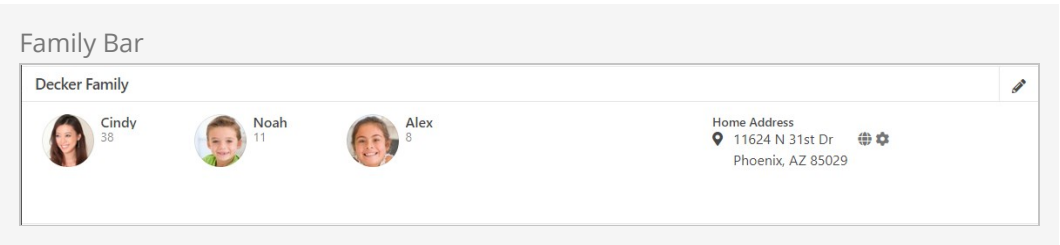
The *Baptism Badge* shows if the individual has been baptized.



6 **Serving Badge**

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

Family Bar

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



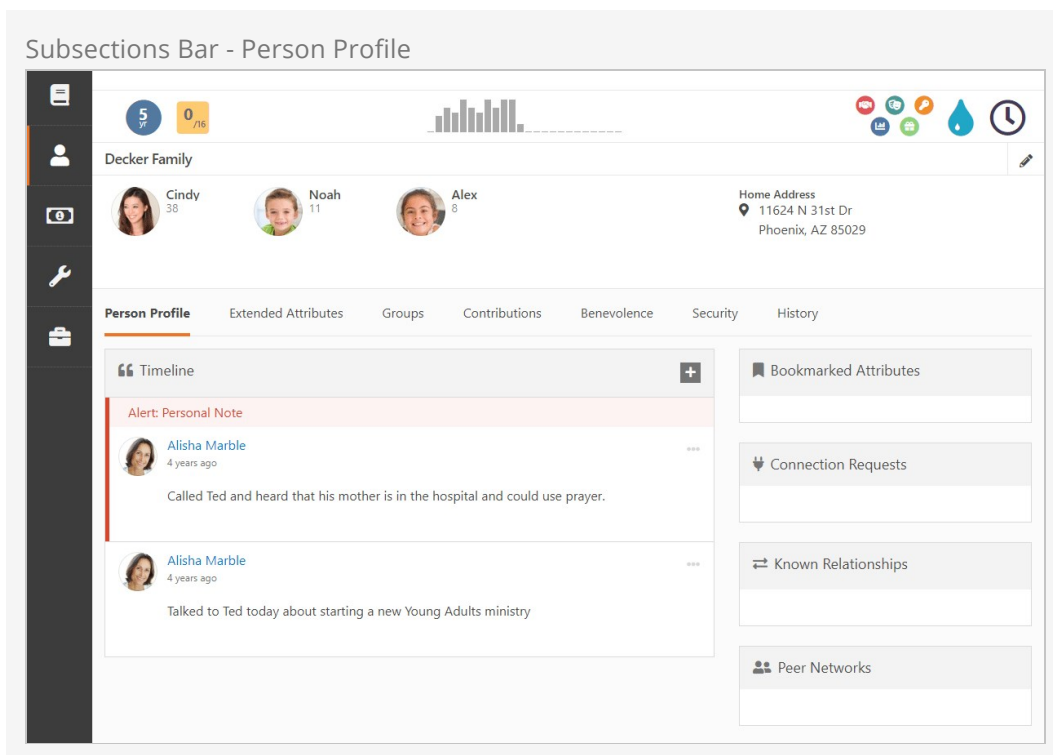
The address section of the family bar has a couple of interesting features. Clicking on the  to the left of the address will bring up an interactive map. Also when you roll-over the address a  will appear to the right. This icon will standardize and geocode the address when clicked.

Note:

In Rock, an individual can be in more than one family. In these cases, both families will show in the family bar. There is no concept of a primary family. Each family is treated as an equal.

Tabs Bar

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



Person Profile Tab




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

Timeline

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

Bookmarked Attributes

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

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


Connection Requests

This section shows a list of Connection Requests that have been made by the individual. You can read more about connection requests in the [Connections](#) manual.

Known Relationships

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

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

To add a new relationship, click the  button on the *Known Relationship* header.

Select the relationship type you want to add from the dropdown, then select the person that matches the relationship you're trying to build.

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

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


Implied Relationships

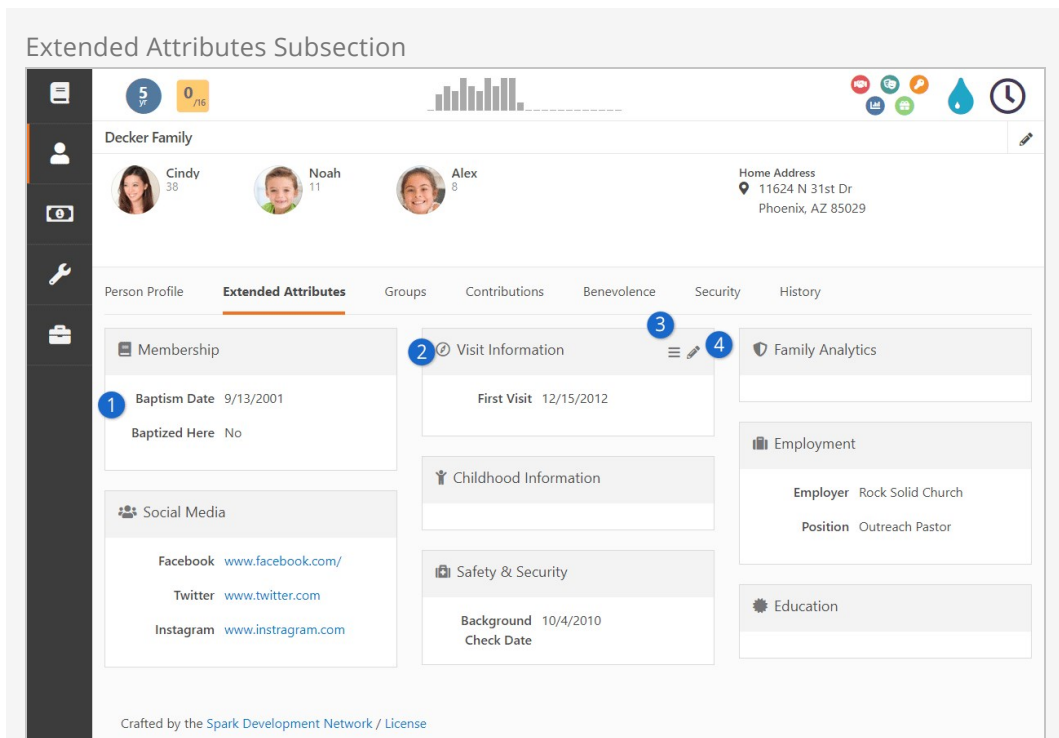
Some relationships are known, but others are implied through the data. For example, if two people are in the same group, we can imply a relationship. Rock highlights these relationships in this section.



Note:

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

Extended Attributes Tab

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



- 1 Category**
 Attributes are grouped into categories to help order and manage them.
- 2 Category Header**
 Each category has a header with a name and optional icon.
- 3 Reorder Button**
 Those with 'Administrate' access to the attribute block can re-order the appearance of the attributes on the block by clicking the  button, then dragging the attributes into the desired order.
- 4 Edit Button**
 To edit the values of the attributes in a category click the  button in the header.

Social Media

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

Admin Tools > General Settings > Person Attributes .

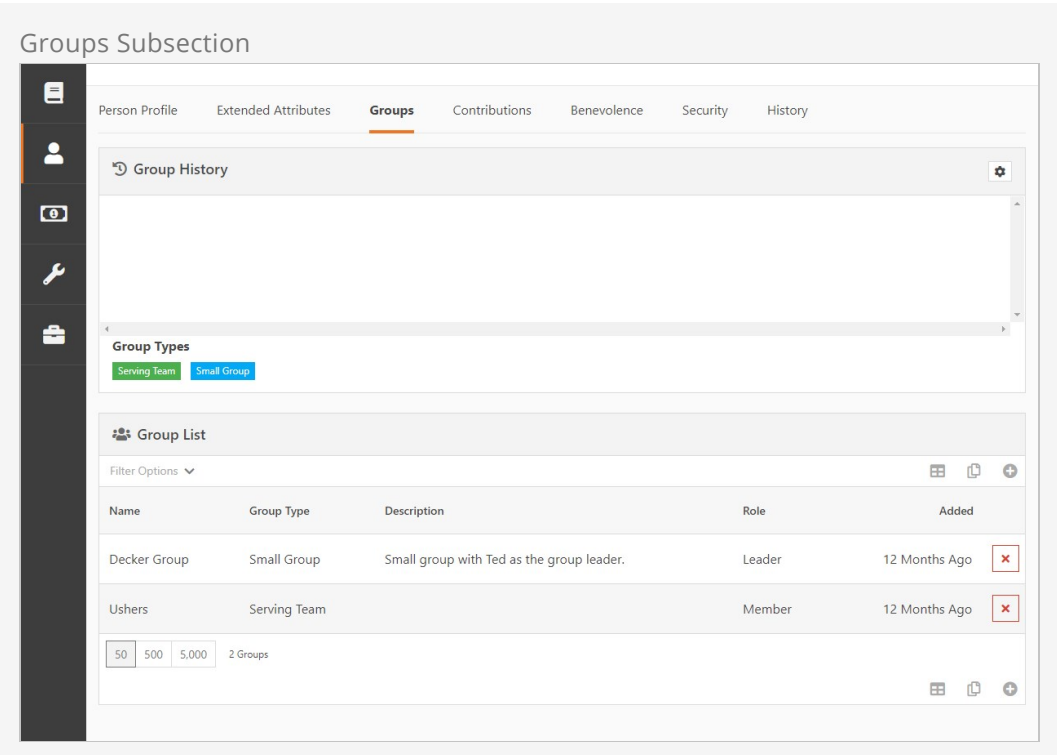
Any *Person Attribute* using the *Social Media Account* field type will be displayed as an option in this category, and the icon of any social media options completed for the person will appear below the person's photo in the *Bio Bar*. The *Person Attributes* screen also contains options that allow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

As you create new groups of person attributes, you'll want to be sure you keep this

page updated. See your administrator for help.

Groups Tab







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





Schedule Toolbox

The schedule toolbox displays three tabs that intertwine with the group scheduler. Each person will have their confirmed and requested schedule, their preferences, and a sign-up tab.

My Schedule



 Search 


Ushers

Serving Team

Are responsible for helping people to their seats.

Member

5 Days Ago







50

500

5,000

9 Groups



 Schedule Toolbox - Alisha Marble

My Schedule


Preferences

Sign-up

Pending Confirmations

5/25/2019 - Greeters - Auditorium Sec. A	4:30 PM	Attending	Decline
6/1/2019 - Children's - Owls	6:00 PM	Attending	Decline
6/2/2019 - Children's - Owls	12:00 PM	Attending	Decline
6/2/2019 - Pot Luck - Chapel	12:30 PM	Attending	Decline
6/8/2019 - Children's - Blue Jays	6:00 PM	Attending	Decline
6/16/2019 - Pot Luck - Chapel	12:30 PM	Attending	Decline

Upcoming Schedules

 Copy Calendar Link

5/18/2019 - Children's - Otters	4:30 PM	Cancel Confirmation
5/19/2019 - Children's - Wolves	9:00 AM	Cancel Confirmation

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My Schedule shows that person's confirmed and requested schedule. This same information can also be seen if that user is signed-in on the external site under `My account > Schedule Toolbox.`

Preferences

Schedule Toolbox - Alisha Marble

[My Schedule](#)
[Preferences](#)
[Sign-up](#)

Children's

Send Reminders

Do not send a reminder

Current Schedule

Every Other Week

Assignment

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

☐ Saturday 4:30pm
☒ Saturday 6:00pm
☐ Sunday 9:00am
☐ Sunday 10:30am
☒ Sunday 12:00pm

No Location Preference
 No Location Preference
 No Location Preference

Greeters

Send Reminders

Do not send a reminder

Blackout Dates

Please provide any dates you will not be able to attend.

5/14/2019 - 6/1/2019 - Alisha Marble - All Groups

5/14/2019 - 6/1/2019 - Bill Marble - All Groups

Learn more about the group schedule toolbox and group scheduling on the [Rock Your Groups Guide](#)

Contributions Tab

This subsection shows the contributions made by the individual (or family, if combined as a family) and any repeating giving profiles that they have. Staff members with security-level access can create new recurring giving profiles or edit existing ones.

Contributions Subsection

Decker Family

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

[Person Profile](#)
[Extended Attributes](#)
[Groups](#)
[Contributions](#)
[Benevolence](#)
[Security](#)
[History](#)

Summary of Contributions

2017	
General Fund	\$1,098.00
Building Fund	\$774.00
Total:	\$1,872.00
2016	
General Fund	\$2,172.00
Building Fund	\$1,536.00
Total:	\$3,708.00

Add One-time Gift

New Scheduled Transaction

Available Contribution Statements

2017 2016 2015

▼ Show More ▼

Pledge List



Account	Total Amount	Payment Schedule	Starts	Ends	Last Modified
---------	--------------	------------------	--------	------	---------------

No Financial Pledges Found



Scheduled Transaction List

Filter Options ▼



Contributor	Amount	Accounts	Frequency	Created	Starting	Ending	Next Payment	Currency Type	Schedule ID	Active	Last Refresh
-------------	--------	----------	-----------	---------	----------	--------	--------------	---------------	-------------	--------	--------------

No Scheduled Transactions Found



Transaction List

Transactions Transaction Details

Filter Options ▼



<input type="checkbox"/>	Person	Date / Time	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
<input type="checkbox"/>	Decker, Ted	6/6/2017 12:00:00 AM	\$312.00	Check		318	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	5/6/2017 12:00:00 AM	\$312.00	Check		317	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	4/6/2017 12:00:00 AM	\$312.00	Check		316	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	3/6/2017 12:00:00 AM	\$312.00	Check		315	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	2/6/2017 12:00:00 AM	\$312.00	Check		314	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	1/6/2017 12:00:00 AM	\$312.00	Check		313	General Fund: \$183.00 Building Fund: \$129.00	
<input type="checkbox"/>	Decker, Ted	12/6/2016 12:00:00 AM	\$309.00	Check		312	General Fund: \$181.00 Building Fund: \$128.00	
<input type="checkbox"/>	Decker, Ted	11/6/2016 12:00:00 AM	\$309.00	Check		311	General Fund: \$181.00 Building Fund: \$128.00	
<input type="checkbox"/>	Decker, Ted	10/6/2016 12:00:00 AM	\$309.00	Check		310	General Fund: \$181.00 Building Fund: \$128.00	
<input type="checkbox"/>	Decker, Ted	2/6/2013 12:00:00 AM	\$300.00	Check		271	General Fund: \$175.00 Building Fund: \$125.00	
<input type="checkbox"/>	Decker, Ted	1/6/2013 12:00:00 AM	\$300.00	Check		270	General Fund: \$175.00 Building Fund: \$125.00	

50 500 5,000 49 Transactions

Reassign Transactions



Bank Account List



Account Number

No Bank Accounts Found




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Security Tab


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

Security Subsection


Decker Family



Cindy38



Noah11



Alex8

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

Person Profile

Extended Attributes

Groups

Contributions

Benevolence

Security

History

Signals

Name	Owner	Note	Expiration Date
No Items Found			

Security Roles

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

50

500

5,000

8 Groups

User Account List

Manage Security Roles

Filter Options

Username	Provider	Created	Last Login	Confirmed	Locked Out	Password Change Required
tdecker	Database	6/15/2017		✓		<div>✕</div>

50

500



5,000

1 Login

Profile Viewed By

Person	Age	Gender	First Viewed	Last Viewed	Times Viewed
Alisha Admin	0	Female	6/15/2017 8:56:56 AM	6/27/2018 9:53:47 PM	54
<div> <div>50</div> <div>500</div> <div>5,000</div> <div>1 Item</div> </div> <div> <div></div> <div></div> </div>					
<div> <div></div> <div>Profiles Viewed</div> <div></div> </div> <div> <div></div> <div></div> </div>					
Person	Age	Gender	First Viewed	Last Viewed	Times Viewed
No Profiles Found					
<div> <div></div> <div></div> </div>					
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Signals

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

Security Roles

In the *Security Roles* section you can view, add and delete the security roles an individual is a member of. The steps for adding and deleting are the same as Signals, above.

User Account List

Below the *Security Roles* section is the *User Accounts* section, where you can see each of the logins assigned to a person. Over time a person can obtain multiple logins if they forget one and re-register on the website. You can add and delete user accounts in this section using the same process described above.

Profile Viewed By

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

Profiles Viewed

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

History Tab




The final subsection on the *Person Profile* page displays the history of the person in Rock. It includes such things as:

- **Communication History** - A list of all of the communications that have been sent to the individual.

- **Attendance History** - A list of all of the events and services the person has attended.
- **Person History** - A list of all of the changes that have been made on the individual record. This screen is helpful identifying what was changed and who made the changes.

History Subsection

Decker Family

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

Person Profile
Extended Attributes
Groups
Contributions
Benevolence
Security
History

Communication List

Filter Options

Subject	Type	Status	Created	Created By
No Communications Found				

☒ **Attendance History**

Filter Options

Location	Campus	Schedule	Group	Start Date Time	End Date Time	Attended
No Attendance Found						

Person History

Date Created: 6/15/2017

Filter Options

Category	Who	Did	What	When
Demographic Changes	Alisha Admin	Added	Instagram value of www.instagram.com	1 Hour Ago
Demographic Changes	Alisha Admin	Added	Twitter value of www.twitter.com	1 Hour Ago
Demographic Changes	Alisha Admin	Added	Facebook value of www.facebook.com/	1 Hour Ago
Group Membership	Alisha Admin	Added to group.	Implied Relationship	12 Months Ago
Group Membership	Alisha Admin	Added to group.	Known Relationship	12 Months Ago
Activity	Alisha Admin	Added	User Login value of tdecker	12 Months Ago
Group Membership	Alisha Admin	Added to group.	Decker Group	12 Months Ago
Group Membership	Alisha Admin	Added to group.	Ushers	12 Months Ago

50
500
5,000
8 Changes


Documents

Filter Options

Name	Document Type	Last Invite Date	Applies To	Assigned To	Signed By	Status	Document	Delete
No Documents Found								

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Editing an Individual

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

Edit An Individual

Edit Person
Home > Person Profile > Edit Person

Edit: Ted Decker

Record Status
Active

Photo

Personal Information
Title: [Dropdown]
First Name: Theodore
Nickname: Ted
Middle Name: [Dropdown]
Last Name: Decker
Suffix: [Dropdown]
Connection Status: Member
Gender: ☒ Male ☐ Female ☐ Unknown
Birthday: Feb / 10 / 1979
Grade: [Dropdown] Graduation Year: 1994
Marital Status: Married

Contact Info
Mobile: (623) 555-3322 ☐ SMS ☐ Unlisted
Home: (623) 555-3322 ☐ SMS ☐ Unlisted
Work: (623) 555-2444 ☐ SMS ☐ Unlisted
Email: ted@rocksolidchurchdemo.com ☒ Is Active
Email Preference: ☒ Email Allowed ☐ No Mass Emails ☐ Do Not Email
Communication Preference: ☒ Email ☐ SMS

Alternate Identifiers
Alternate Identifiers
Value: 111122223334444

Advanced Settings
Combine Giving With: Decker Family (Ted, Cindy, Noah and Alex)
Previous Last Names: No Items Found
Lock as Child: ☐ Yes
Search Keys: No Search Keys Found

Save **Cancel**

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Most of this screen should be pretty simple, but let us point out a couple of helpful tips.

When you mark an individual *Inactive*, you will need to provide a reason. This helps the organization understand why groups of people are leaving and it helps the next person who looks at this specific record understand why this change was made.

Near the bottom of the screen is the *Alternate Identifiers* section, where you can assign an individual an alternate identifier to use during check-in to speed up the process. Alternate identifiers may include barcode or fingerprint IDs, or any other text you care to use. ([Checking Out Check-In](#) has more information about this process).

Before Now

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

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

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

Finally, there's a *Search Keys* section you'll want to note. Rock is configured to support you entering additional email addresses in this area. These could be outdated email addresses, or simply alternate email addresses which they use sometimes (for instance, a work email address) but which aren't the primary email address assigned to their profile. Rock will consider these alternate email addresses when looking for matching person records, but will **not** use these alternate addresses to send messages to. It's simply to help eliminate some duplicate records from getting created.

Adding a Family

Important

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

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

Add A Family

New Family
[Home](#) > New Family

+ Add Family

Family Members

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

[Add Person](#)

Campus *
Main Campus

Marital Status of Adults ⓘ

Address
Address

City
Arizona
Zip

Next

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Family Members

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

- Only use these fields to add individuals to the family who are not already in the database. If you know that one or more of the individuals are already in the system, just add those who are not. Once the family is saved, you can then edit the

family and add the existing members.

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

Campus and Address

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

Add Family Block Settings

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

Add Family Block Settings

Add Group CRM > Person Detail / Id: 252

Basic Settings | Advanced Settings

Name 1
Add Family

Group Type 2
Family

Parent Group 3
[Group Icon]

Show Title 4
Yes

Show Nick Name 5
No

Show Middle Name 6
No

Enable Common Last Name 7
Yes

Default Connection Status 8
Visitor

Show Suffix 9
Yes

Gender 10
Require a gender for each person

Birth Date 11
Don't require

Child Birthdate 12
Don't require

Grade 13
Don't require

Show Inactive Campuses 14
Yes

Require Campus 15
Yes

Marital Status Confirmation 16
[Dropdown]

- 1 Name**
Enter the name you want to give the block. The default is 'Add Family'.
- 2 Group Type**
Select the group type to display groups for. The default is 'Family'.
- 3 Parent Group**
Select the parent group to add the new group to. The default is 'None'.
- 4 Show Title**
Select 'Yes' to display a dropdown menu of titles.
- 5 Show Nick Name**
Select 'Yes' to show an edit box for Nick Name.
- 6 Show Middle Name**
Select 'Yes' to display an edit box for Middle Name.
- 7 Enable Common Last Name**
Select 'Yes' to autofill the last name field when adding a new group member with the last name of the first group member.
- 8 Default Connection Status**
Select the default connection status.
- 9 Show Suffix**
Select 'Yes' to display the person suffix.

10 Gender

Select whether or not gender should be required for each person added.

11 Birth Date

Select whether or not a birth date should be required for each person added.

12 Child Birthdate

Select whether or not a birth date should be required for each child added.

13 Grade

Select whether a grade should be required for each child added when the group type is Family.

14 Show Inactive Campuses

Select whether or not inactive campuses should be shown.

15 Require Campus

Select 'Yes' to make a campus required.

16 Marital Status Confirmation

Select whether or not a confirmation message should be displayed when saving an adult without a marital status and the group type is Family.

17 Adult Marital Status

Select the default marital status for adults when the group type is Family.

18 Child Marital Status

Select the default marital status for children when the group type is Family.

19 Address

Select whether or not to require an address for the family.

20 Location Type

Select the type of location should be used for the address.

21 Show Cell Phone Number First

Select whether or not the cell phone number should be listed first before the home phone number.

22 Phone Number

Select whether or not a phone number should be required for at least one person in the family.

23 Adult Phone Number

Select whether or not a phone number should be required for each adult added.

24 SMS

Select whether or not SMS should be enabled for cell phone numbers by default.

25 Attribute Categories

Select the Person Attribute Categories to display attributes from.

26 Workflows

Which workflows to launch when family added.

27 Person Detail Page

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

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

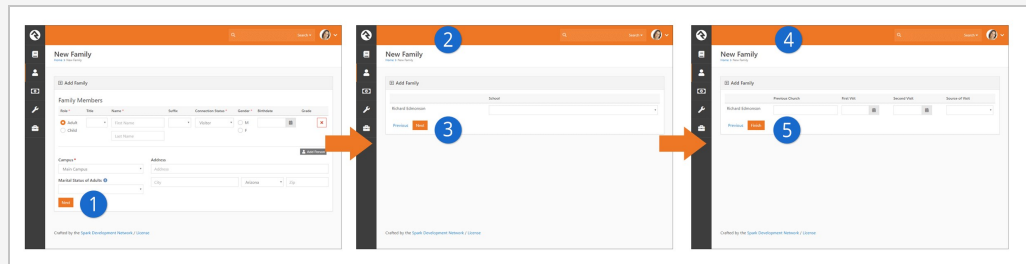
Want Even More Info?

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

The block settings of the *Family Entry* block include a setting for configuring attribute categories. When you pick one or more categories, the **Finish** button at the bottom of the page changes to **Next**. After filling out the family information and selecting **Next**, you'll see an entry form for the first attribute category you selected. Completing this form and pressing **Next** takes you to the next attribute category. This will continue until you've entered information for each attribute category. On the last screen, you'll see the **Finish** button.

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

Adding Additional Attributes



1 Next

With the additional attribute categories added, the **Finish** button is renamed to **Next**.

2 First Category

After clicking **Next**, the first attribute category, *Education*, is displayed.

3 Next or Previous

Navigation buttons are present to go both forward and backward.

4 More Information

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

5 Finish

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

Useful Tips

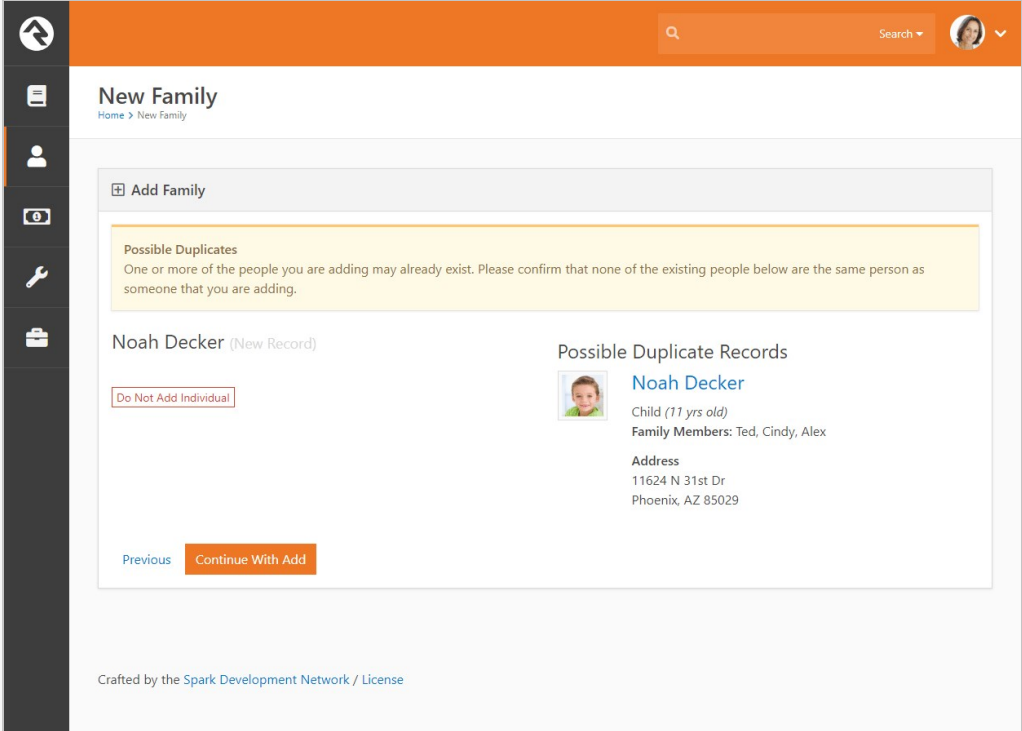
Below are a few tips to help you use this feature to it's fullest:

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

Duplicates Happen

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

Possible Duplicates



The screenshot displays a web interface for adding a new family. At the top, there's a navigation bar with a search icon and a user profile icon. Below this, a sidebar on the left contains icons for home, family, person, add, settings, and a briefcase. The main content area is titled 'New Family' with a breadcrumb 'Home > New Family'. A section titled 'Add Family' contains a yellow warning box with the text: 'Possible Duplicates. One or more of the people you are adding may already exist. Please confirm that none of the existing people below are the same person as someone that you are adding.' Below the warning, there are two columns. The left column shows 'Noah Decker (New Record)' with a 'Do Not Add Individual' button. The right column, titled 'Possible Duplicate Records', shows a record for 'Noah Decker' with details: 'Child (17 yrs old)', 'Family Members: Ted, Cindy, Alex', and 'Address: 11624 N 31st Dr, Phoenix, AZ 85029'. At the bottom of the main content area, there are 'Previous' and 'Continue With Add' buttons. A footer note at the bottom of the page reads 'Crafted by the Spark Development Network / License'.

Home > New Family

Add Family


Possible Duplicates
One or more of the people you are adding may already exist. Please confirm that none of the existing people below are the same person as someone that you are adding.

Noah Decker (New Record)

Do Not Add Individual


Previous Continue With Add

Possible Duplicate Records

 **Noah Decker**
Child (17 yrs old)
Family Members: Ted, Cindy, Alex
Address
11624 N 31st Dr
Phoenix, AZ 85029

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Editing a Family

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

Editing A Family

Home > Person Profile > Edit Family

Decker Family

Family Name *

Decker Family

Campus *

Main Campus

Record Status

Active

Family Status

Family Members

Ted Decker

Adult

Child

Cindy Decker

Adult

Child

Noah Decker

Adult

Child

Alex Decker

Adult

Child

Addresses

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

Save

Cancel

1 Overview Section

2 Family Member Section

3 Address Section

Overview Section

The top section of the page allows you to edit the family name, campus and record

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status of the family. The family name is used as a title for the family.

Since a person is tied to a campus through the family unit, this is where you would change the campus for all members of a family.

Note:

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

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

Family Member Section

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

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

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

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

Note:

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

Address Section

This final section lists all of the current and past addresses for a family. Several different address types can be attached to a family. (New address types can be created if needed; see your administrator for help.)

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

Important:

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

How Rock Handles People and Families

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

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

Age

Rock calculates an individual's age by comparing the birthdate entered in the *Person Profile* page to the current date.

Age Classifications

In Rock, an Adult is anyone over the age of 18 or marked as an adult in one or more families. A Child is anyone less than 18 or a child in all families. If either of these conditions is not met, the individual is marked as Unknown. Rock calculates age each time a person is saved and re-calculates it every time the *Rock Cleanup* job is run. The value is then saved in the *Age Classification* property on the Person model, where it is made available to use in Data Views, Reports and other filtering operations.

Grade

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

A Word to the Wise:

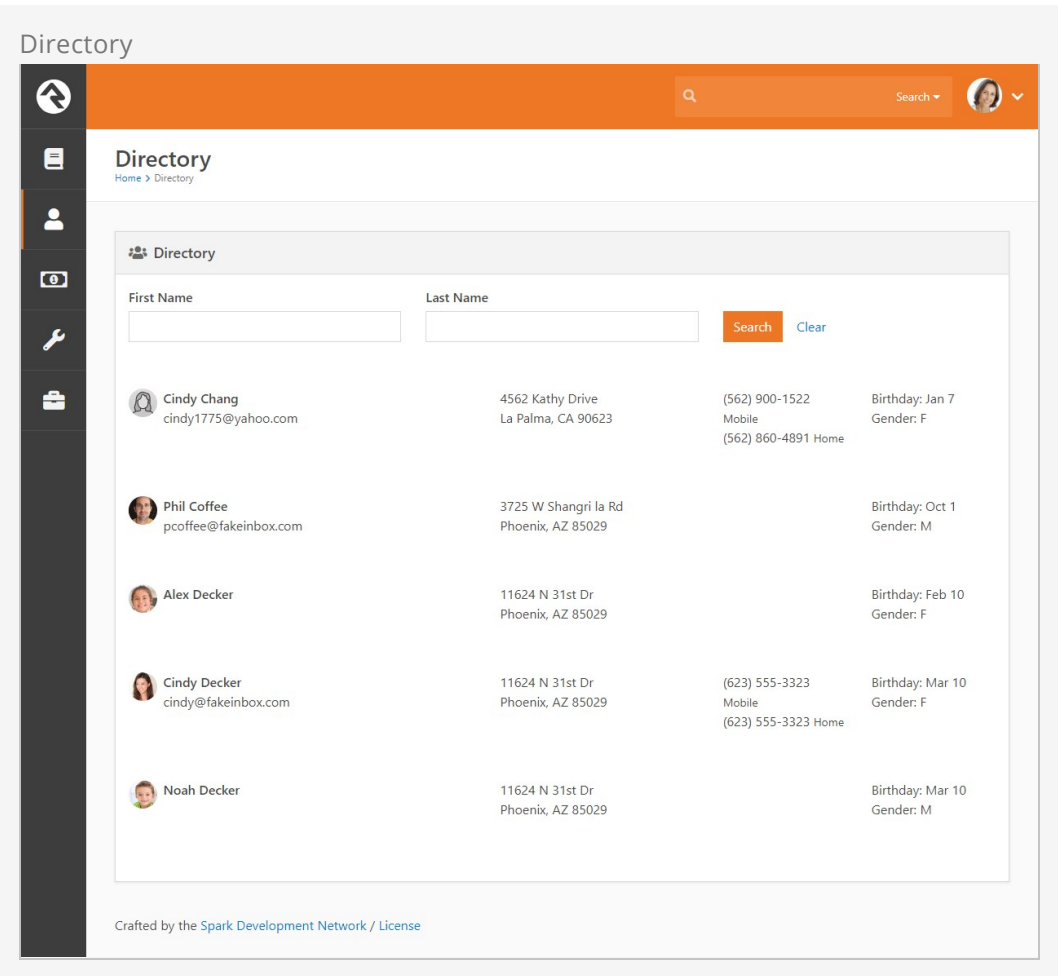
The transition occurs at the *end* of the specified date, so if you enter today's date, the change will take place tonight at midnight. Because this is simply a calculation, and nothing is changed on a person's profile, you can freely change the date back and forth and observe that the grade changes.

Primary Family ID

If an individual belongs to more than one family, the *Primary Family ID* is assigned based on which family is entered into Rock first. An individual can reset this ID by changing the order of the families listed in the Family Members section of the *Person Profile* page, moving whichever family they want designated as primary to the top of the list.

Directory

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



Out of the box, the directory is configured to display a simple search screen, but you can change the block settings to show the first 1500 people in the database if you prefer, as shown in the screenshot above. That's not all this block can do though. Let's check out all the features found under the block settings.

Block Settings

Setting	Description
Data View	The results of the directory are driven by a provided Data View. This

Block Settings

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

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

Duplicates

Where Do Duplicates Come From

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

There are two main ways duplicates are added to the system. The first is human entry. Before you add someone to the database, it's important that you make sure they haven't already been added. Even if you're certain they are new, it's always a good idea to double check.

The second way duplicates are added to the system is from activity on the external website. While Rock tries to limit the number of duplicates that are created through activities like contributions and account registration, sometimes there isn't enough data to know for sure. At other times a duplicate is created for security reasons. Rock has to be very careful not to allow someone to "hijack" a record. This would allow a person to create an account as another person and gain visibility to their contact and contribution information.

In these cases, Rock will create a duplicate record so that a staff person can double-check that the activity is normal before performing a merge. If two records exist with the same name but different email addresses, Rock will display a hijack warning message. After the records are merged, the person will be required to confirm their email address the next time they log in. The *Reset Login Confirmation* option comes configured out of the box, but you can disable it in the block settings of the *Merge People* screen.

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

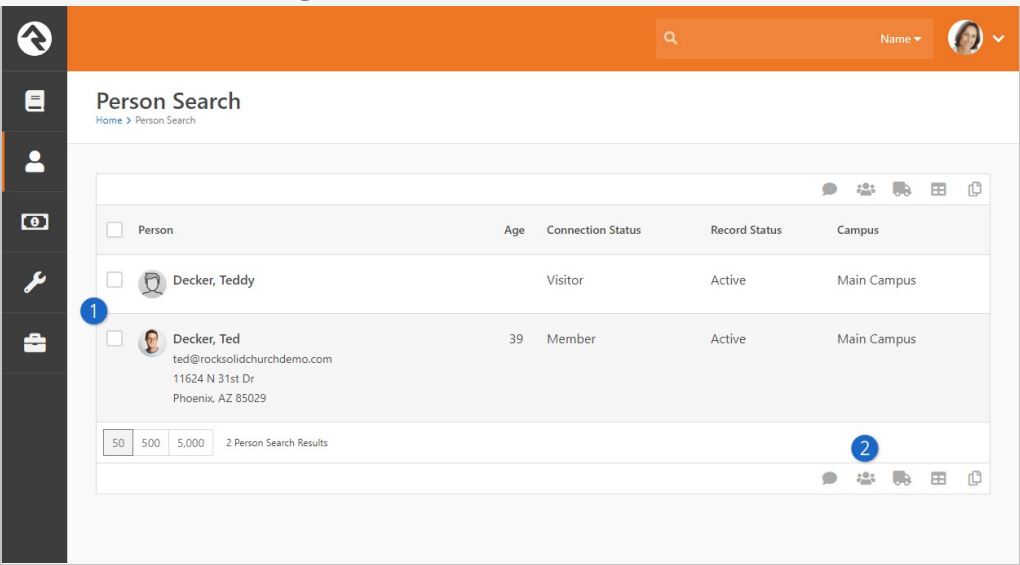
Merging Records

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

records.

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

Select Individuals To Merge



Person Search
Home > Person Search

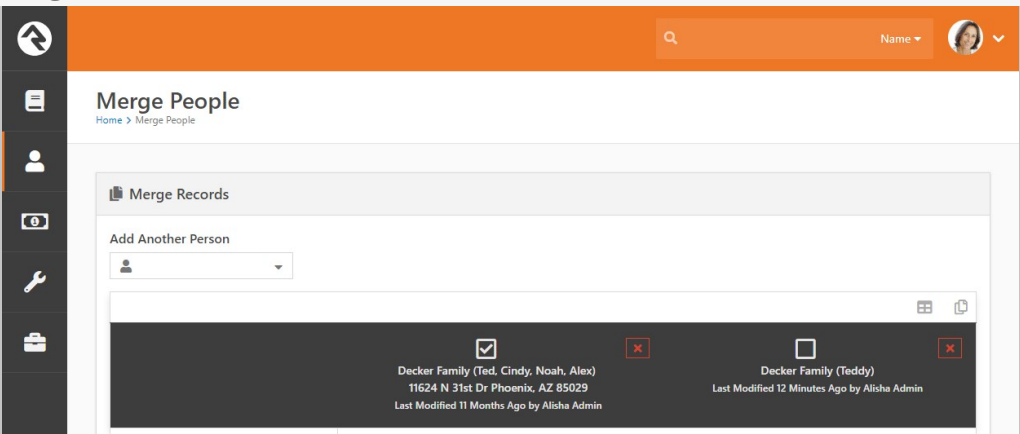
<input type="checkbox"/>	Person	Age	Connection Status	Record Status	Campus
<input type="checkbox"/>	Decker, Teddy		Visitor	Active	Main Campus
<input checked="" type="checkbox"/>	Decker, Ted ted@rocksolidchurchdemo.com 11624 N 31st Dr Phoenix, AZ 85029	39	Member	Active	Main Campus

50 500 5,000 2 Person Search Results

- Select Records**
First select the records you wish to merge.
- Click Merge**
Next, click the merge button at the bottom of the grid.

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

Merge Screen




Merge People
Home > Merge People



Merge Records

Add Another Person

Decker Family (Ted, Cindy, Noah, Alex)
11624 N 31st Dr Phoenix, AZ 85029
Last Modified 11 Months Ago by Alisha Admin

Decker Family (Teddy)
Last Modified 12 Minutes Ago by Alisha Admin



Photo	<input checked="" type="radio"/> 	<input type="radio"/>
First Name	<input checked="" type="radio"/> Theodore	<input type="radio"/> Teddy
Nick Name	<input checked="" type="radio"/> Ted	<input type="radio"/> Teddy
Connection Status	<input checked="" type="radio"/> Member	<input type="radio"/> Visitor
Birth Date	<input checked="" type="radio"/> 2/10/1979	<input type="radio"/>
Anniversary Date	<input checked="" type="radio"/> 1/4/2001	<input type="radio"/>

<input checked="" type="checkbox"/> Decker Family (Ted, Cindy, Noah, Alex) 11624 N 31st Dr Phoenix, AZ 85029 Last Modified 11 Months Ago by Alisha Admin	<input checked="" type="checkbox"/> Decker Family (Teddy) Last Modified 12 Minutes Ago by Alisha Admin
---	--



Phone Numbers		
Mobile	<input checked="" type="radio"/> (623) 555-3322	<input type="radio"/>
Home	<input checked="" type="radio"/> (623) 555-3322	<input type="radio"/>
Work	<input checked="" type="radio"/> (623) 555-2444	<input type="radio"/>

Person Attributes		
First Visit	<input checked="" type="radio"/> 12/15/2012	<input type="radio"/>
Employer	<input checked="" type="radio"/> Rock Solid Church	<input type="radio"/>
Position	<input checked="" type="radio"/> Outreach Pastor	<input type="radio"/>
Facebook	<input checked="" type="radio"/> www.facebook.com/	<input type="radio"/>
Background Check Date	<input checked="" type="radio"/> 10/4/2010	<input type="radio"/>
Baptism Date	<input checked="" type="radio"/> 9/13/2001	<input type="radio"/>

<input checked="" type="checkbox"/> Decker Family (Ted, Cindy, Noah, Alex) 11624 N 31st Dr Phoenix, AZ 85029 Last Modified 11 Months Ago by Alisha Admin	<input checked="" type="checkbox"/> Decker Family (Teddy) Last Modified 12 Minutes Ago by Alisha Admin
---	--

Adaptive I	<input checked="" type="radio"/> 46	<input type="radio"/>
Adaptive S	<input checked="" type="radio"/> 21	<input type="radio"/>
Adaptive C	<input checked="" type="radio"/> 8	<input type="radio"/>
Natural D	<input checked="" type="radio"/> 28	<input type="radio"/>
Natural I	<input checked="" type="radio"/> 29	<input type="radio"/>
Natural S	<input checked="" type="radio"/> 20	<input type="radio"/>
Natural C	<input checked="" type="radio"/> 18	<input type="radio"/>
DISC Last Save Date	<input checked="" type="radio"/> 2/2/2013	<input type="radio"/>
Personality Type	<input checked="" type="radio"/> ID	<input type="radio"/>

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The first thing you'll want to do on this screen is to select the record that is the master

record. This is the record that the others will be merged into. Once you have done this look at each row and ensure that the correct value is selected. If a value is not correct on the master record you can choose to select the data from one of the other records. When you're done click the **Merge Records** button and you will be taken to the *Person Profile* page of the merged master record.

Merging Records and Family Attributes

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

If the person does not have Edit access to the merge block they will see a message noting that their request to merge a person has been saved. This *Merge Request* will be listed under **Tools > Data Integrity > Merge Requests**. Out of the box Rock only allows the members of the *RSR - Data Integrity Worker* to complete merges. You can change this by giving other groups Edit access to the merge block.

The screenshot shows a web application interface for a 'Merge Request'. At the top, there is a header bar with a search icon, a 'Name' dropdown, and a user profile icon. Below the header, a sidebar on the left contains icons for home, merge people, people, tools, and a briefcase. The main content area is titled 'Merge People' and includes a breadcrumb 'Home > Merge People'. Under the 'Merge Records' section, a green success message states: 'Success Your merge request has been sent to the data integrity team to process.' Below this is an 'Optional Note' text area and a 'Save' button.

Merging Records Without Enough Security Rights

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

Recommendations for Life Events

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

Coming Soon!

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

Death of a Family Member

The death of a loved one is a very hard thing. It's made even harder, though, when the remaining person is constantly reminded of their loss. We suggest that when someone notifies the church about a death, the following steps be followed:

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

Divorce

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

1. From the *Edit Family* screen, select the link [Move to New Family](#) for one of the adults.
2. Depending on custody status, you may want to ensure the children are in both families. To do this, find the new family and add any children to it, without

- removing them from their current family.
- 3. Create a *Former Spouse* relationship to both adults.
- 4. Update phone and address information.
- 5. Add any name changes on the *Edit Individual* screen (under *Advanced Settings*).

Marriage

After the wedding, you will want to complete the following steps.

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

Child Turns 18

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

1. From the *Edit Family* screen, select the link [Move to New Family](#).
2. Create *Parent* relationships back to parents.
3. Update the individual's status from *Child* to *Adult*.

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

Process Adult Children Job

Rock ships with a job that processes adult children automatically, which not only makes things easier for you but also helps keep the person data in Rock accurate. The job only processes people who have a child role in one or more families, but also is of an "adult" age. (The default age in Rock is 18.) There are a number of settings the job uses to process individuals. With these settings, the job looks at all of the families a person belongs to and their role in each of those families, then decides whether or not the person should be updated as an adult and/or added to a new family.

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



Person Notes

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

- Information on life events like hospitalization of a loved one
- Interest in a specific serving area
- Likes or dislikes (only as they relate to personalizing your ministry)
- Time and date of phone calls


These notes help the staff to be on the same page and help make a church of any size feel small and caring.

Types of Notes

 Timeline 4 

Alert: Personal Note


1



Alisha Admin
a minute ago (edited a minute ago)

Please see staff before connecting to a serving team.


2



Alisha Admin
now

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


3



Alisha Marble
4 years ago (edited 43 seconds ago by Alisha Admin)

Talked to Ted today about starting a new Young Adults ministry

- 1 Alert Note**
Used to warn viewers of important topics. These note types will always remain at the top of the list.
- 2 Normal Note**
These are the default note type. They are viewable by anyone who has been given access to them.
- 3 Personal Notes**
These notes are viewable only by the person that entered them.
- 4 Add Note Button**
Click this button to add a new note.


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

Note:

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

Adding A Note

Timeline




Write a note...

☐ Alert ☐ Private

Cancel Save Note


Alert: Personal Note



Alisha Admin

a minute ago (edited a minute ago)


Please see staff before connecting to a serving team.



Alisha Admin

now

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

 Editor Window

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

Warning:

Consider the wording of these alert notes. Try to be discreet as possible while still getting your point across.

Badges

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

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

Note:

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

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

Pre-configured Badge Types

Rock comes with the following badge types pre-configured and ready for you to use in your organization. Be sure to see the [Adding a New Badge](#) section below to learn how to set the badges up and add them to a person's profile, because while some of these badges are pre-installed and already visible for you when you first log into Rock, other badges exist as a badge *type* and will require you to configure and add them before they are visible.

Alert Note

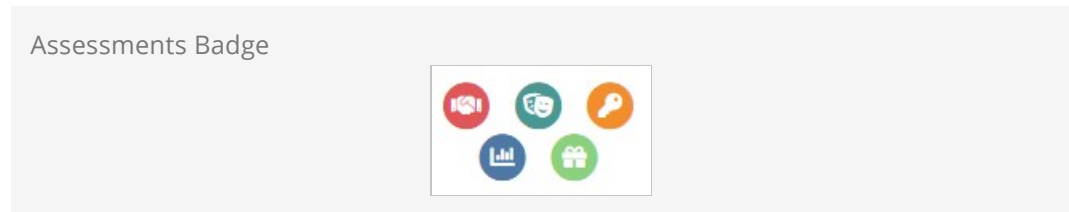
Alert Note Badge



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

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

Assessments

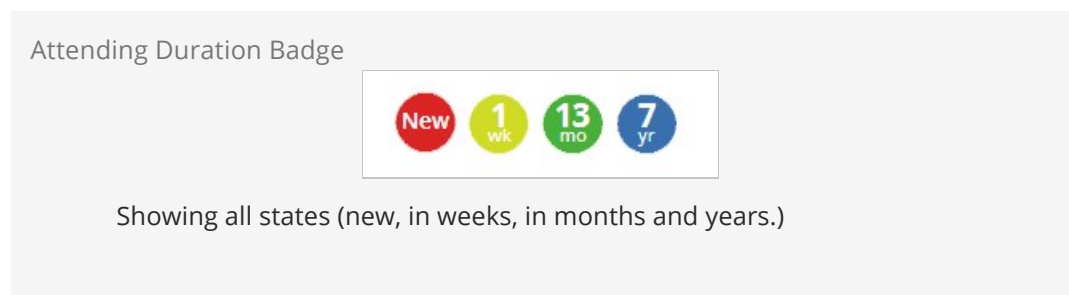


This badge displays assessment information. The individual icons within the badge will be filled in with color if the assessment has been taken. You can hover over the badge to see a summary of results, from the following assessments:

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

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

Attending Duration



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

Person Signal Type

Person Signal Type



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

Personal Devices

Personal Devices



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

16 Week Attendance

16 Week Attendance Badge



It's often useful to measure how often a family attends. If the family is checking in their children, this information will be displayed on the *16 Week Attendance* badge. The top bold number is the number of times the family has checked in a child in the last 16 weeks. This badge gives you a concrete metric of family engagement.

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

Family Attendance

Family Attendance Badge



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

often the family attended a weekend service that month. This chart gives you an excellent picture of the attendance trend.

The bar graph on an adult will aggregate attendance for the whole family, while child records will only show attendance for the specific child.

Baptism Badge



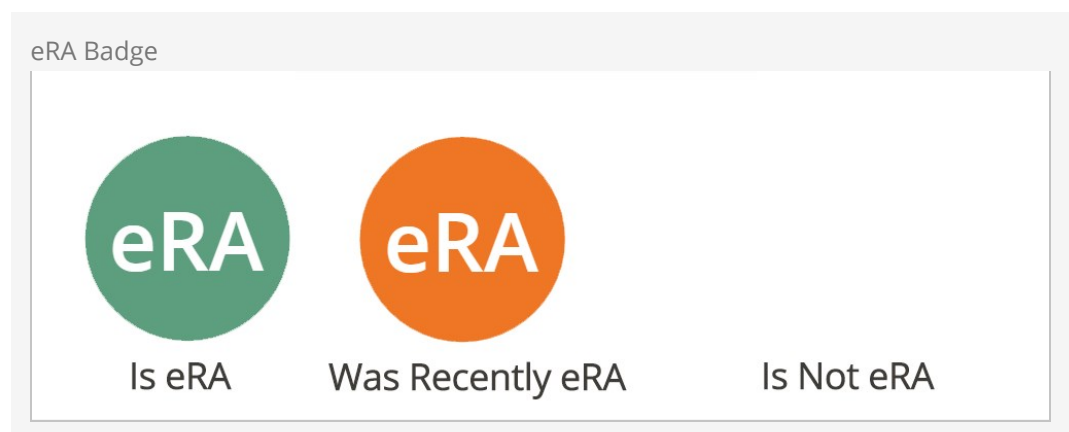
The *Baptism Badge* shows if the individual has been baptized, using the *Baptism Date* person attribute. If the person has been baptized, the water droplet will be bright and the rollover text will show the date of the baptism. If they haven't been baptized yet, the droplet will be light.

Serving Badge



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

eRA Badge



This badge shows the eRA status of the current person. See the [Person And Family Analytics](#) chapter for more information on this badge.

Labels

Badge Labels

Attendee

Main Campus

Inactive

Showing all label types on the person profile page.

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

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

Last On Site

Last On Site

Today

4







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


Defining a New Badge



You define new badges under [Admin Tools > General Settings > Person Profile Badges](#).

Here you will see a list of currently configured badges. You can also choose to create a new badge from this screen.

Badge List Screen



















































Name  

Person Profile Badges

[Home](#) > [General Settings](#) > [Person Profile Badges](#)




 **Person Profile Badge List**



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

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14 Person Badges



Add Badge Screen

Person Profile Badge Detail

Home > General Settings > Person Profile Badges > Person Profile Badge Detail

Add Person Badge

Name *

Description

Badge Type *

Save Cancel

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When you add a badge you provide it with a name, description and type of badge. Certain badge types require additional configuration. Let's look at each badge type and how it can be used.

Alert Note

This badge type will show up when a type of note which you specify has been added to the person and marked as "alert".

Giving

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

Attended Group of Type

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

In Data View

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

Top Person Signal

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

Personal Device

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

Interaction in Range

A badge of this type will show how many interactions the person had with a specific channel, within a specific date range. When clicked, it will take you to the page you specify (usually the interactions page for the channel, but it could also be a report or another page you create), so you can get more information. This would be useful if you wanted to see how many times they've visited your website in the last month, or how many communication interactions (received, opened, clicked, etc) were seen from them in the last week.

Geofenced By Group

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

Attending Duration

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

Campus

The *Campus Badge* displays a label of the individual's current campus. There's not much more it does, so it's re-use is very limited.

Assessments

This type of badge shows the results of the assessments, if they've taken it through Rock. This badge is pre-installed on person profiles out of the box.

Family Attendance

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

Family Weeks Attended In Duration

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

In Group Of Type

Unlike the others, this badge type was made to be used often. This is the type of badge that powers the *Serving Badge*. Here's how it works. You provide a *Group Type* and it

will show the badge enabled if they are a member of a group of that type or disabled if they aren't. The icon that is used for the badge comes from the *Group Types* "Icon CSS Class." There is an additional setting on the badge that allows you to set the color of the icon.

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

In Group with Purpose

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

Lava Badge



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

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

Note:

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

Adding Badges To The Person Profile Page

Once you have defined a new badge the next step is to add it to the *Person Profile* page. From this page click the  button in the *Admin Toolbar*. This will display a block properties button for each block on a page. Hover over the badge container block that you wish to add a badge to and select its  button. Finally, check the badge you wish to add to the container and press .

Adding Badge to Person Profile Page

Badges CRM > Person Detail / Id: 237 ✕

Basic Settings Advanced Settings

Name *

Badges *

<input type="checkbox"/> Connection Status	<input type="checkbox"/> DISC Personality Assessment Result	<input checked="" type="checkbox"/> Top Person Signal	<input checked="" type="checkbox"/> Personal Devices
<input type="checkbox"/> Record Status	<input checked="" type="checkbox"/> Last Visit on External Site	<input type="checkbox"/> Alert Note Exists	<input type="checkbox"/> Campus
<input checked="" type="checkbox"/> Family 16 Week Attendance	<input checked="" type="checkbox"/> eRA	<input checked="" type="checkbox"/> Attending Duration	<input type="checkbox"/> Family Attendance
		<input type="checkbox"/> Baptism	<input type="checkbox"/> In Serving Team

Save **Cancel**

Warning:

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

Tags

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

Tags are added to a person in the bio section of the Person Profile page. You can add a tag to a person by clicking the `Add Tag` text and typing in the name of a tag. To save the tag link, simply press enter. If a tag already exists, it will be displayed in the auto-complete area. If you type a new tag, it will confirm that you wish to create a new tag before adding it.

Your Tags vs. Our Tags

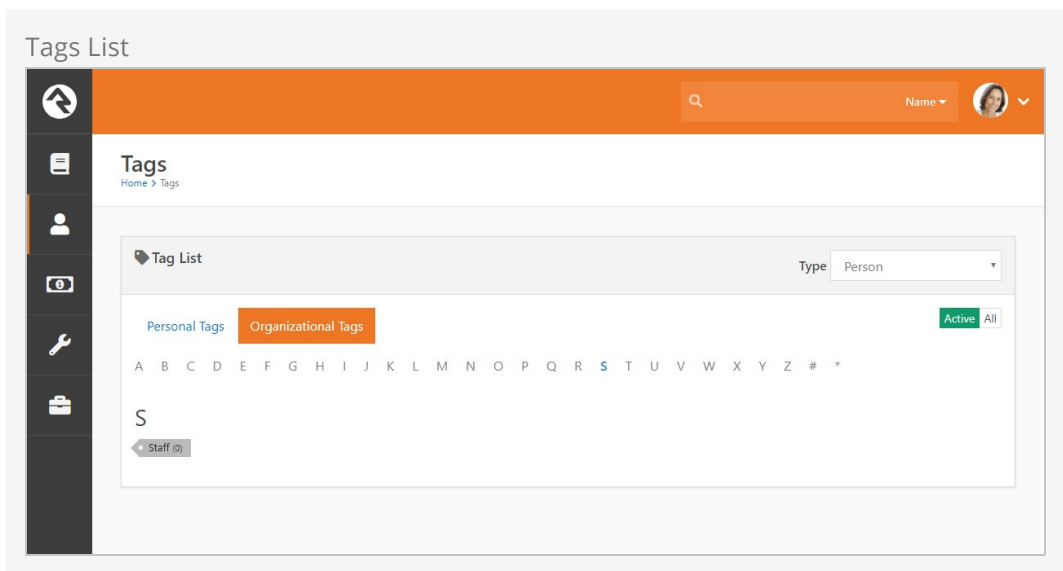
There are two types of tags in Rock, personal tags and organizational tags. Personal tags are only seen by the creator, while organizational tags are viewable by everyone. When you create new tags, they are created as personal tags. Your administrator can promote them to organizational tags upon request.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

Tip:

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


Viewing Tags

To view all of the individuals in a specific tag, go to `People > Tags`.



The *Tags List* screen displays all of your tags with the option at the top to switch to see public tags. Clicking on a specific tag will display all of the individuals in the selected tag. You can also manage the individuals within a specific tag. If you want to filter tags even further, you can select a type from the *Type* dropdown menu.

Administrating Tags

Tags can be managed by an administrator under [General Settings > Tags](#). The two most common reasons to administrate tags is to delete tags that no longer serve a purpose and promote personal tags to organizational tags. Those with tagging rights can also secure tags, limiting who can view them. If you're an administrator or otherwise have tagging rights, you can add security by clicking on the  button in the tag's detail screen, located at [Admin Tools > General Settings > Tags](#). For more information about security settings, see the *Securing Rock* chapter of the [Admin Hero Guide](#).

Tag Security

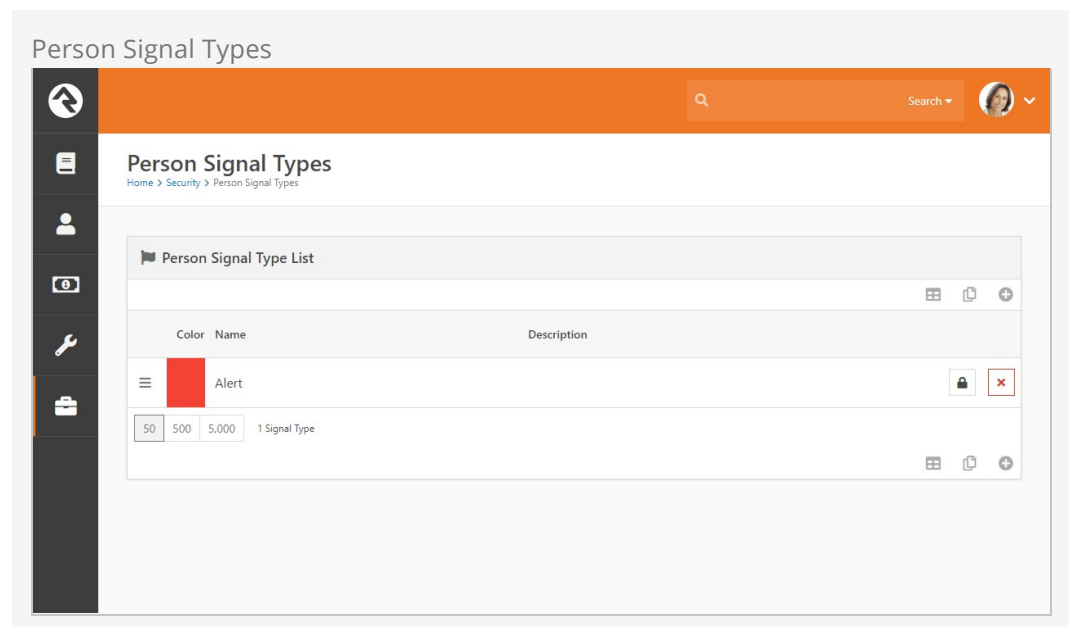
Some administrative tasks related to tags (like deleting them) operate off the security of the Entity. Be sure to set the entity security for tags ([Admin Tools > Security > Entity Administration > Tags](#)) to reflect your needs. Out of the box, the *Staff* and *Staff Like Access* have permissions to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

Person Signal Types

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

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

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



Signals are set up in the *Person Signal Types* screen from the Security Page. You can create as many signals as you need for your organization, giving each a specific color and icon to differentiate them. As you set your signals up, keep the following in mind:

- The list order of the signals in the *Person Signal Types* screen is important. The color of the top-most signal is displayed on a person's *Profile Page*, so it's best to keep the most important signal types at the top of the list.

- It's best to use general names for signals. For example, "Safety Team Recommendation". This helps to avoid the problem of labeling people, something that not only isn't kind, but also could pose future legal issues. Consider using an appropriate color and icon for signals as well.
- Configuring the security settings for each signal type is essential. Signals aren't meant for everyone to see. Likewise, the information provided on the *Person Profile* page (particularly in the tabs subsections) is sensitive and should only be viewed by those with the appropriate security permission.

Person Signal Types

Person Signal Type Detail

Home > Security > Person Signal Types > Person Signal Type Detail

Add

Name *

Description

Color ⓘ *

Icon CSS Class

Save Cancel

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

When a person is assigned a signal, it shows up as a flag-shaped badge on their *Profile Page*. The color of the flag corresponds to the most important signal type they've been assigned. It also includes a number, which indicates the number of signals assigned to the person. Roll over the flag to quickly view a list of which signals the person has. A detailed view of the person's signals is available in the *Security* tab of the *Person Profile* page. Signals are also displayed on group member lists, appearing as an icon of the top-level signal beside the person's name.

Person Signal Type Badge

Search

Actions

Bob Gregg (Robert)

Member Main Campus

add tag

32 yrs old (6/9/1987)
Male
Married 12 yrs (7/1)

(623) 555-4450 Home
rgreggs@fakeinbox.com

0 / 16

Greggs Family

Lorraine
31

Tim
6

Jordan
4

Home Address

10638 N 16th Ave
Phoenix, AZ 85029

Person Profile

Extended Attributes

Steps

Groups

Contributions

Benevolence

Security

History

Signals

Name	Owner	Note	Expiration Date
Safety Team Recommendation	Alisha Admin	Safety Team Recommendation	

50

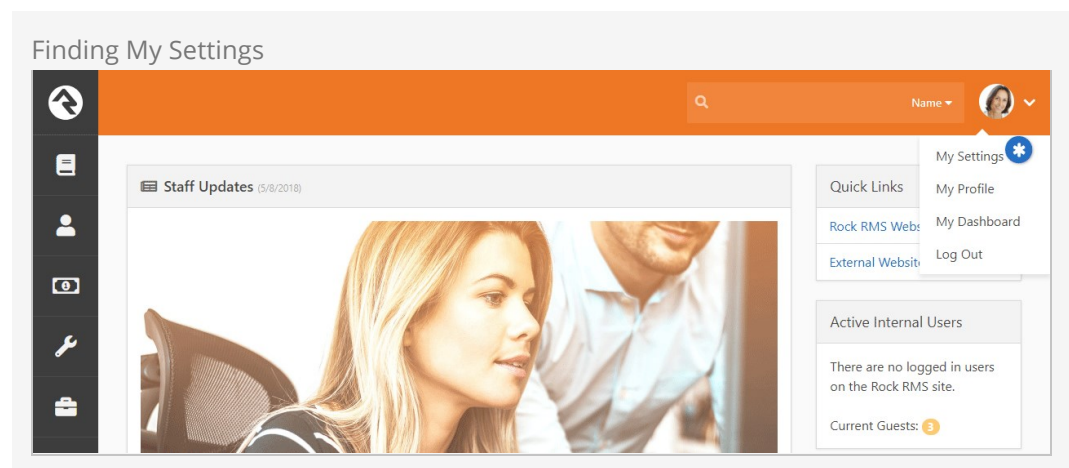
500

5,000

1 Item

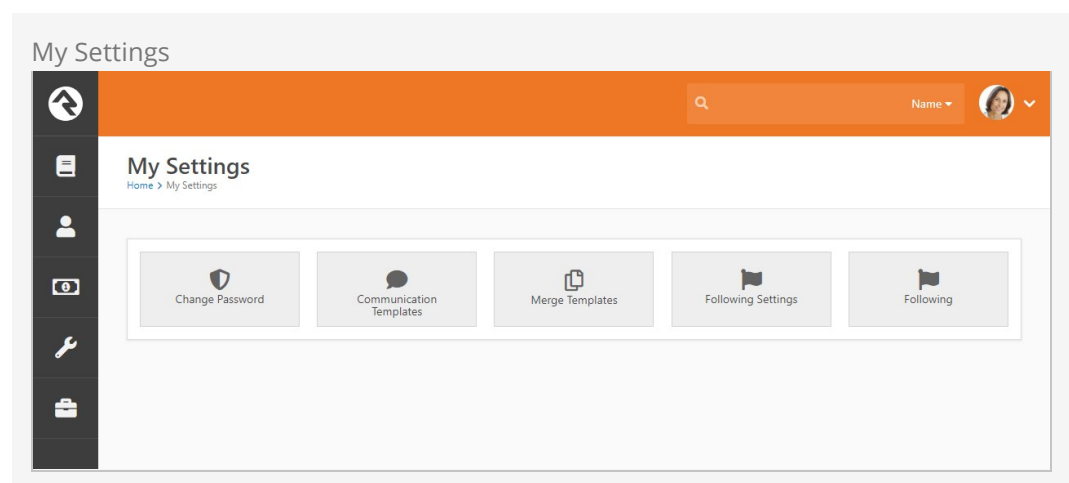
My Pages

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



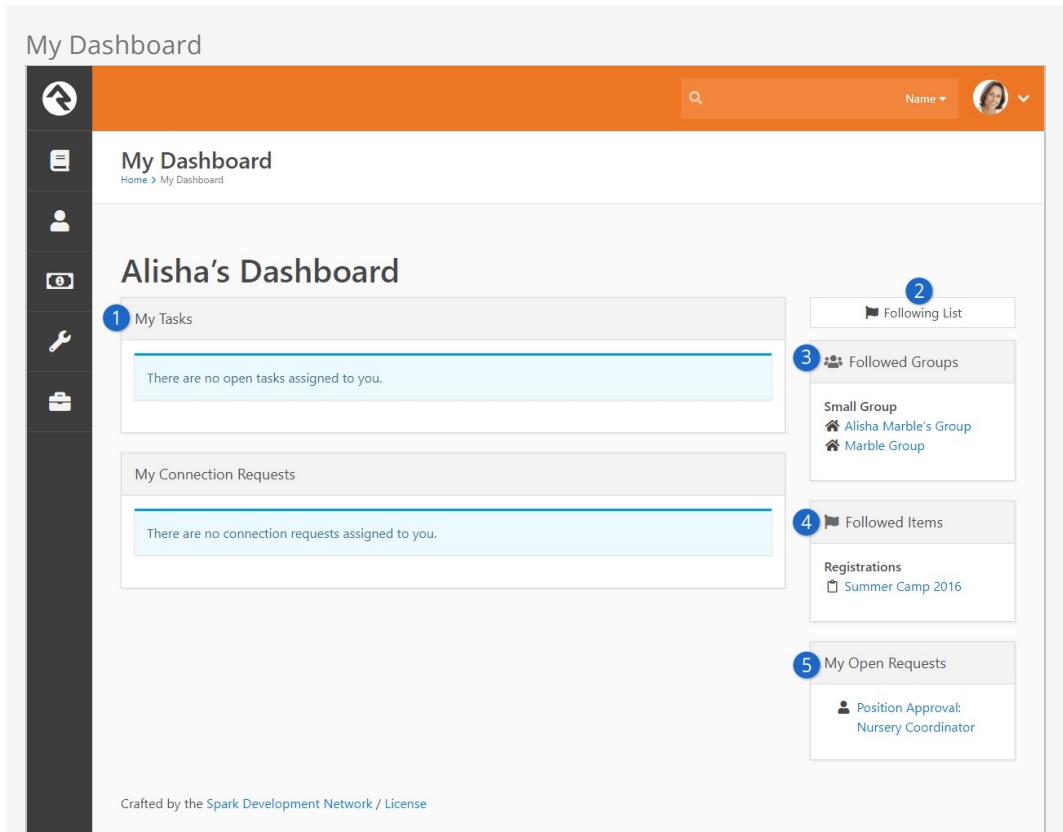
My Settings

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



My Dashboard

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



1 My Assigned Tasks

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

2 Following Suggestions

This button lists the number of Following Suggestions currently waiting for you to review.

3 Followed Groups

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

4 Followed Items

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

5 My Open Requests

This is a list of open workflows that you have initiated.

My Profile

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

Configuring a Person

As you've seen, there are a lot of ways you can describe an individual in Rock. And there are still a few more configuration options available for you to extend. Below we'll walk through some of these additional settings on a person.

Note:

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

Connection Status

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

Status	Typical Usage
Member	This individual has completed all requirements established by your church to become a member.
Attendee	While not a member, this person is a consistently active participant in your services and/or ministry events.
Visitor	This status is used when a person first enters through your first-time visitor process. As they continue to attend, they will become an attendee and possibly a member.
Participant	A participant is involved in non-service or ministry events or programs. If a family is a part of a church's youth sports program but does not attend, you can enter them into Rock as a participant.
Web Prospect	Web Prospects are the default status given to a record that is added from the website.

It is up to your organization to determine the right connection statuses for your ministry. These statuses can be modified by an administrator under [Admin Tools >](#)

[General Settings > Defined Types > Connection Status](#).

Record Types

Record types help Rock add some capabilities to track businesses within the database. This is mainly used to allow individuals to give financial gifts through their businesses. There are only two record types included after the install, *Person* and *Business*. For the most part, it won't make sense to add additional types unless you're adding new functionality by writing plugins.

Record Status

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

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

You can add your own record statuses, but realize that some of the features of Rock assume that the values provided have a certain meaning.

Making a person inactive

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

Inactive Reasons

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

- No Longer Attending
- No Activity
- Moved
- Deceased

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

Marital Status

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

- Single
- Married
- Unknown

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

Phone Types

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

- Home
- Mobile
- Work

Titles

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

Suffixes

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

Person Attributes

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

When To Use Person Attributes

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







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


Managing Person Attributes

Person attributes are managed from `Admin Tools > General Settings > Person Attributes`.

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


Person Attribute List



























































Person Attributes

[Home](#) > [General Settings](#) > [Person Attributes](#)



Attribute List

Filter Options ▾




	Id	Qualifier	Name	Categories	Default Value		
≡	715	Person	Legal Notes	Childhood Information			
≡	716	Person	Previous Church	Visit Information			
≡	717	Person	First Visit	Visit Information			
≡	718	Person	Second Visit	Visit Information			
≡	719	Person	Source of Visit	Visit Information			
≡	739	Person	School	Education			
≡	740	Person	Employer	Employment			
≡	741	Person	Position	Employment			
≡	906	Person	Membership Date	Membership			
≡	1036	Person	Facebook	Social Media			
≡	4223	Person	Background Checked	Safety & Security			
≡	4224	Person	Background Check Date	Safety & Security			
≡	4225	Person	Background Check Result	Safety & Security			
≡	4226	Person	Background Check Document	Safety & Security			
≡	553	Person	Ability Level	Childhood Information			
≡	676	Person	Allergy	Childhood Information			
≡	12991	Person	Do Not Send Giving Statement	Membership	N		
≡	174	Person	Baptism Date	Membership			
≡	11260	Person	Envelope Number	Finance Internal			
≡	8877	Person	Currently an eRA	Family Analytics			
≡	1037	Person	Twitter	Social Media			
≡	3235	Person	Adaptive D	DISC			
≡	3236	Person	Adaptive I	DISC			
≡	1038	Person	Instagram	Social Media			
≡	8878	Person	eRA Start Date	Family Analytics			
≡	714	Person	Baptized Here	Membership	N		
≡	8879	Person	eRA End Date	Family Analytics			

50

500

5,000

45 settings



Person Attribute Edit

Edit Position
Id: 741

Edit Attribute

Name *

Position

Active ⓘ

☒ Yes

Description

The person's employment position

Categories

Employment

Key *

Position

Icon CSS Class

Required

☐ Require a value

Indexing Enabled ⓘ

☐ Yes

Analytics Enabled ⓘ

☐ Yes

Analytics History Enabled ⓘ

☐ Yes

Enable History ⓘ

☐ Yes

Field Type
Text

Password Field ⓘ

☐ Yes

Max Characters ⓘ

Show Character Limit Countdown ⓘ

☐ Yes

Default Value

Save

Cancel

Name

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

Description

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

You might define what it means to your organization.

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

How the data is entered:

Sample: This value is updated by the baptism coordinator after the baptism record card is received.

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

Categories

The number of person attributes you create can get overwhelming over time. To help

with this, you can categorize them into groups. This allows you to manage groups of attributes instead of individual attributes.

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

Key

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

Required

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

Field Type

OK, this is where it gets fun. Rock allows you to store different types of data. You get to tell the system what type to use to store your attribute. Let's take a look at these field types and see how they can be used.

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

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

The field types above are the most commonly used types for person attributes. You'll notice in the type dropdown there are other items that are not covered. The list is made up of all of the possible field types in Rock, not just those commonly used in person attributes. They're listed in their entirety, as in certain edge cases they may be useful.

Default Value

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

Securing Person Attributes


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

Note:

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

Displaying Person Attributes

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

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

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

Tip:

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

Public Person Attributes

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

Basic Usage

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

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

Application

Home / Connect / Application

1
Display Progress Bar
☐ Yes

2
Save Values
After Each Page

3
Workflow

4
Done Page

5
Forms

Form Title

Form Header

Field	Type	Use Current Value	Required
No Fields Found			

Form Footer

Add Form

Save
Cancel

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

1 Display Progress Bar

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

2 Save Values

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

3 Workflow

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

4 Done Page

In addition to sending a workflow, you can also pick another page on your website that user should be sent to after they have filled out all the forms.

This could be a page that has an HTML block with a thank you message.

5 Forms

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

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

The screenshot shows a 'Form Field' dialog box with a blue header and a light blue footer. The dialog is titled 'Form Field' and has a close button in the top right corner. It contains four numbered callouts: 1. 'Person Attribute' with a dropdown menu showing 'Ability Level'. 2. 'Use Current Value' with a checked checkbox and a 'Yes' label. 3. 'Required' with an unchecked checkbox and a 'Yes' label. 4. 'Pre-Text' and 'Post-Text' with two large text input areas. The footer has 'Save' and 'Cancel' buttons.

1 Person Attribute

This one's obvious. Select the person attribute that you'd like to display on the form.

2 Use Current Value

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

3 Required

Check this box for the user to be required to fill out a value for this person attribute.

4 Pre-Text/Post-Text

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

Family Attributes

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


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


Viewing Family Attributes


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

Family Attributes

Decker Family

Cindy
38

Noah
11

Alex
8

Home Address
11624 N 31st Dr
Phoenix, AZ 85029

Foster Family
Yes

1

2

1 **Attributes**
Attributes marked *Show On Grid* will always be displayed.

2 **Edit Button**
You can update the family attributes (as well as the other family information) by selecting the **Edit** button.

Adding Family Attributes

Since families are simply a group type in Rock, you'll add family attributes in the *Group Type* editor under **Admin Tools > General Settings > Group Types**.

Version: 1.9.0

77 of 113

Last Updated: 9/23/2019

Categories Not Yet Supported


Attribute categories are not currently supported for family attributes. Support for categories will be added in an upcoming release.

Person & Family Analytics

An important role for pastors is to care for and support the people who attend their church. As a church grows this can become a difficult task as you may lose track of many of the details. Rock's person and family analytics tools help summarize all of these details and provide predictive alerts when certain key behaviors change.

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

Well, Almost Done...

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

eRA – Estimated Regular Attender

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

Recipe for an eRA

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

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

Criteria for Becoming an eRA

- Have given at least 4 times in 12 months, once being in the last 6 weeks
- (or) have attended at least 8 times in the last 16 weeks

Criteria for Exiting an eRA

- Haven't given in over 8 weeks
- (and) have attended less than 8 times in the last 16 weeks
- (and) haven't attended at all in the last 4 weeks


You might be thinking, "Those are a great start, a little tweaking for our church and we'll be set." Another goal of the eRA metric is to have a well-defined measure that churches can use to help benchmark. Because of this, we don't allow the recipe to be configured. If you're not sure why standard benchmarks are needed, just ask a church what their attendance is. Without asking at least four qualifying questions (is that just weekend services, does it include volunteers, etc.) you won't know what this number really represents. For that reason, and to establish that well-defined measure, when calculating eRA Rock looks at the attendance for groups whose attendance counts as 'Weekend Service'.

Viewing the Analytics

Person Profile Page

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

Analytics Attributes

 Family Analytics

Currently an eRA

Yes

eRA Start Date

1/1/2013

eRA End Date

6/28/2018

First Checked-In

1/1/2013

Last Checked-In

6/28/2018

First Gave

1/1/2013

Last Gave

6/28/2018

Times Checked-In (16 wks)

16

Times Given (52 wks)

52

Times Given (6 wks)

6

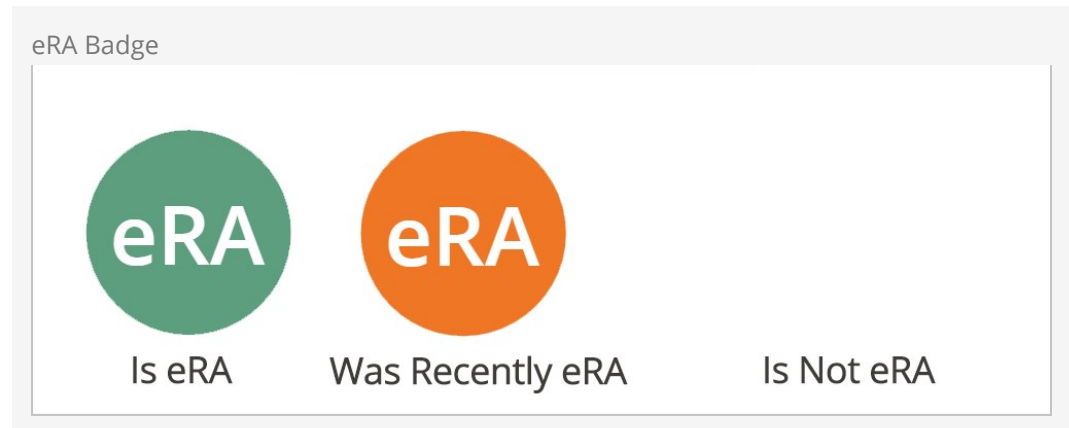
Security

By default all of these values are viewable by the RSR - Staff Workers and RSR - Staff Like Workers. You can adjust the security of each of these attributes under

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

eRA Badge

The state of the person's eRA can also be seen on the badge bar. The eRA badge has 3 states.



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

eRA History

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

eRA Workflows

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

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

Attribute Key	Attribute Type	Description
Campus	Campus	The home campus of the family.

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

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

Calculating the Analytics

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

The job can also be configured to launch workflows when a family enters or exits the eRA status. See the eRA Workflow section for more information on these settings.

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

Name

Scheduled Job Detail

[Home](#) > [System Settings](#) > [Jobs Administration](#) > [Scheduled Job Detail](#)

Edit Service Job

Name *

Active

☐ Yes

Description

Notification Status

Cron Expression ? *

Notification Emails ?

Cron Description

At 08:00 PM, only on Tuesday

Job Type *

Last Status Message

eRA Entry Workflow ?

eRA Exit Workflow ? 1

Set Visit Dates ? 2

General

Command Timeout ?

1 Workflows

Enables eRA entry and exit workflows to be configured.

2 Set Visit Dates

When enabled this will enter the first and second visit person attributes. The logic for this is fairly complex as it doesn't only look at attendance; the job also considers when the person record was created. This prevents the system from adding a date to a record that has been around for a while (the case of an adult who has been attending and then has a child which becomes the first attendance).

Managing Known Relationships

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

Creating A New Relationship Type

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

To add a new relationship type, follow these steps.

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

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

School Grades



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

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

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

Knowing that not every system uses the term *Grade*, Rock allows you to configure the term that is used by editing the *Grade Label* global attribute under [Admin Tools > Global Attributes](#).

Bulk Updates

Sometimes you have to update a little bit of data. Sometimes you need to update a lot. When you find yourself in the latter situation, you'll want to use Rock's bulk update capabilities. You may have noticed the  icon at the bottom of table grids that list people. Selecting people on the grid and pressing the  icon will take you to the bulk update screen.

Select Individuals for Bulk Updates

Person Search
[Home](#) > [Person Search](#)

<input type="checkbox"/>	Person	Age	Connection Status	Record Status	Campus
<input type="checkbox"/>	 Decker, Alex 11624 N 31st Dr Phoenix, AZ 85029	8	Attendee	Active	Main Campus
<input type="checkbox"/>	 Decker, Cindy cindy@fakeinbox.com 11624 N 31st Dr Phoenix, AZ 85029	38	Member	Active	Main Campus
<input type="checkbox"/>	 Decker, Noah 11624 N 31st Dr Phoenix, AZ 85029	11	Attendee	Active	Main Campus
<input type="checkbox"/>	 Decker, Ted ted@rocksolidchurchdemo.com 11624 N 31st Dr Phoenix, AZ 85029	39	Member	Active	Main Campus

50 500 5,000 4 Person Search Results

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1 Select All

Selects all items visible on the grid. It does not select items on previous or next pages.

2 Individual Select

You can also select specific individuals on the grid. Or you can use the *Select All* and then individually unselect items.

3 Bulk Update

Takes you to the bulk update screen with the individuals you selected.

Power Tip

If you would like to select all the individuals, even those on previous/next pages, you can leave selection blank (don't select anyone) and press the bulk update button. This adds everyone contained in the dataset that is linked to the grid, to the bulk update screen.

Once on the bulk update screen, you can select various data points to update. You must first select the data item you wish to update by clicking the icon next to the item.

Performing Bulk Update



Bulk Update

Home > Bulk Update

Update Individuals

Selected Individuals: 4 People

Add Person

Ted Decker
Cindy Decker
Noah Decker
Alex Decker

Remove All Individuals

Individual Details

☐ Title ☐ Suffix

☐ Connection Status ☐ Record Status

☐ Gender ☐ Marital Status

☐ Grade Graduation Year

☐ Campus

☐ Communication Preference

☐ Email Status ☐ Email Preference

☐ Email Note

☐ Follow ☐ Review Reason

☐ System Note ☐ Review Reason Note

Childhood Information

Education

Employment

Membership

Visit Information

Add note

Note Type

Personal Note

Note

☐ Alert

☐ Private

Group

Action

Add To Group

Group

Tag

Next

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1

List of People
You can add or remove individuals from the *Selected Individuals* section.

2

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

3

Notes
You can add notes using the bulk update tool.







4

Group
You can also add/update/remove individuals from groups. After selecting a group, you can even set any group member attributes for that specific group.

*


You can modify the block settings to include workflows in your bulk update options. Simply go to the block settings and select the workflows you want available from the *Workflow Types* dropdown menu. An additional Workflows section is then displayed here, allowing you to choose which workflows to perform for the individuals included in your bulk update. You can select multiple workflows for a single update.

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




Bulk Update


[Home](#) > Bulk Update



Name ▾



▾

 Update Individuals

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

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

Please confirm that you want to make these updates.

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

Person Profile Editor


The *Person Profile Editor* is an external page that is dedicated to allowing individuals to update their own information. You can find this page on the external website by selecting [My Account](#) from the *Login Status* block.

Person Profile Editor

New Here?ResourcesConnectGiveBlogCalendarWatchHello Ted ▾

My Account

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



Ted Decker

38 yrs old (2/10/1978)
Male
Married 15 yrs (1/4)
Home Address
11624 N 31st Dr
Phoenix, AZ 85029

(623) 555-3322 Home
ted@rocksolidchurchdemo.com

Update

Account Info


Change Password

Groups

Ushers (Member)

Decker Group (Leader ★)

Decker Family




Cindy Decker

37 yrs old (3/10/1979)
Female
Married 15 yrs (1/4)

(623) 555-3323 Home
cindy@fakeinbox.com


Update



Noah Decker

10 yrs old (3/10/2006)
Male
Single
5th Grade

Update



Alex Decker

7 yrs old (2/10/2009)
Female
Single
2nd Grade

Update

Add New Family Member

Request Additional Changes

You'll notice that individuals are able to edit their details at the top of the page. They can also update each of the individuals in their family.

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

- **Show Family Members:** This determines whether the block should allow viewing and editing of the family members.
- **Address Type:** The type of address that should be displayed for viewing and

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editing.

- **Phone Numbers:** The type of phone numbers to show for viewing and editing.
- **Workflow Launch Page:** This block can be configured to show a button labeled `Request Additional Changes`. When this button is clicked, it will navigate to this page to launch the workflow.
- **Family Attributes:** The family attributes you would like to configure for viewing and editing.
- **Person Attributes (Adults):** The person attributes you would like to configure for viewing and editing for adults in the family.
- **Person Attributes (Children):** The person attributes you would like to configure for viewing and editing for children in the family.

Photo Requests

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

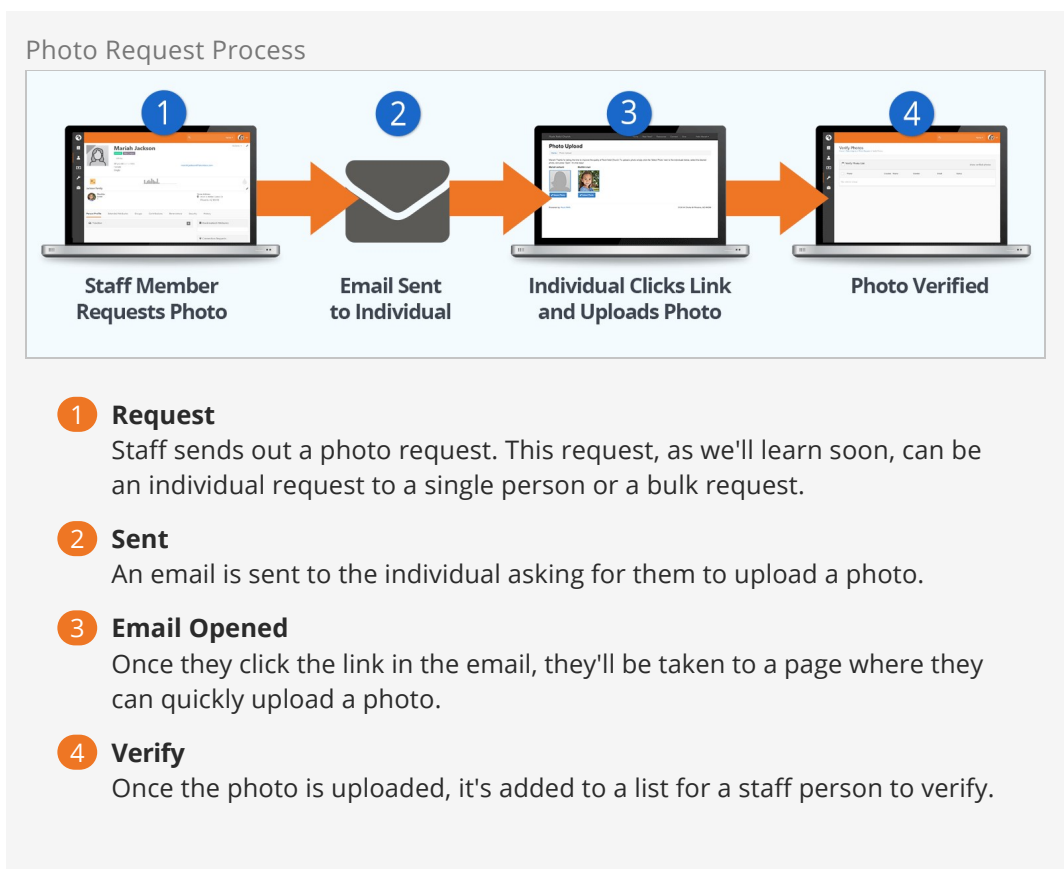
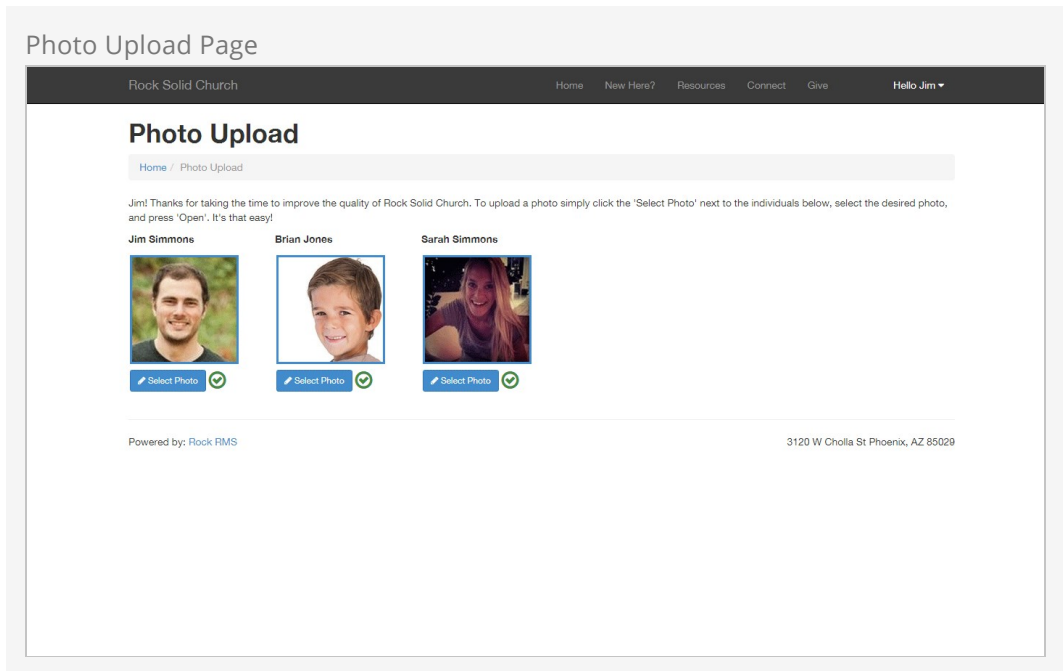


Photo Upload

When the individual clicks the upload link in their email, they'll be taken to the page below. This page is under `External Homepage > Supporting Pages > Photo Upload` but it isn't linked into the website.



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

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

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

Bulk Requests

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

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

The screenshot shows the 'Send Photo Requests' page. It features a sidebar with navigation icons and a main content area. The main area has a title 'Send Photo Requests' with a breadcrumb trail 'Home > Communications > Send Photo Requests'. Below the title is a 'Select Criteria' section with the following options:

- Family Roles:**
 - ☐ Adult (1)
 - ☐ Child
- Age is more than:**
 - 16 (2)
- Connection Status:**
 - ☐ Member (3)
 - ☐ Attendee
 - ☐ Visitor
 - ☐ Participant
 - ☐ Web Prospect
- Exclude people with a photo updated in the last (years):**
 - 3 (4)
- Buttons:**
 - Send (6)
 - Test (5)

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

1 Role

Select for requests to go out to adults and/or children.

2 Age

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

3 Status

Select the *Connection Statuses* you'd like to use as a filter.

4 Exclude

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

5 Test

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

6 Send

When you're ready, click `Send`.


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

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

Tip To Limit Abuse:

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

But There's More

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

Individual Requests

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

`Actions > Photo Request` .

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

Verifying Photos

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

`Tools > Data Integrity > Photo Requests > Verify Photos` .

Verify Photos

The screenshot shows the 'Verify Photos' interface. At the top, there's a search bar and a user profile icon. Below the header, the page title 'Verify Photos' is followed by a breadcrumb trail: 'Home > Data Integrity > Photo Requests > Verify Photos'. The main content area is titled 'Verify Photo List' and includes a checkbox labeled 'show verified photos' (callout 1). Below this is a table with columns: Photo (with a select-all checkbox, callout 2), Created, Name, Gender, Email, Status (callout 4), and a delete icon (X). The table contains six rows of photo verification requests. At the bottom of the table, there are pagination controls (50, 500, 5,000) and a 'Verify' button (callout 5). A footer note states 'Crafted by the Spark Development Network / License'.

Photo	Created	Name	Gender	Email	Status
<input type="checkbox"/>	8/8/2018 1:00 PM	Cindy Decker	Female	cindy@fakeinbox.com	Pending
<input type="checkbox"/>	8/8/2018 1:03 PM	Brian Jones	Male	brian.jones@fakeinbox.com	Verified
<input type="checkbox"/>	8/8/2018 1:03 PM	Jim Simmons	Male	jim.simmons@fakeinbox.com	Pending
<input type="checkbox"/>	8/8/2018 1:04 PM	Sarah Simmons	Female	sarah.simmons@fakeinbox.com	Verified
<input type="checkbox"/>	8/8/2018 12:58 PM	Tom Miller	Male	tom.miller@fakeinbox.com	Pending
<input type="checkbox"/>	8/8/2018 1:02 PM	Pamela Foster	Female	pamela@fakeinbox.com	Verified

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

Photo Opt-Out

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

[External Homepage](#) > [Supporting Pages](#) > [Photo Opt-Out](#) .

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

[Tools](#) > [Data Integrity](#) > [Photo Requests](#) > [Photo Request Application Group](#) .

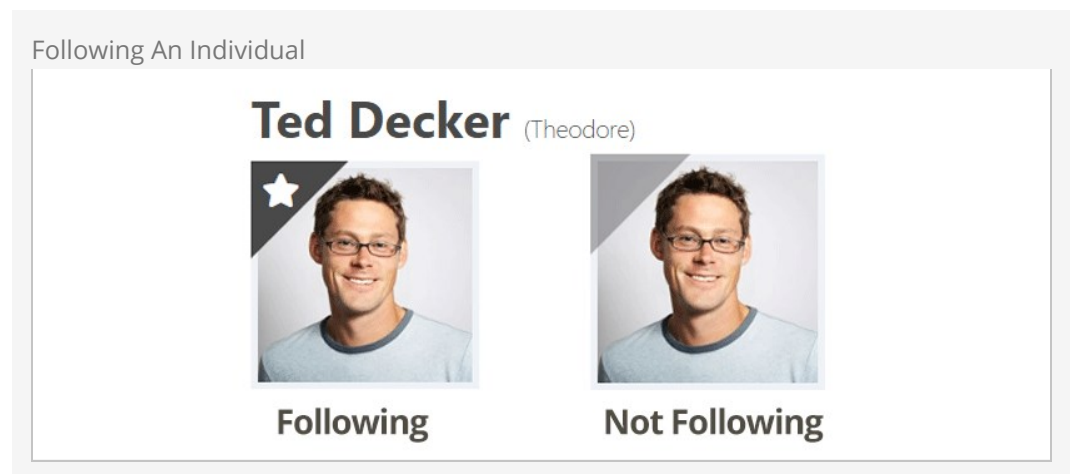
To remove someone from the opt-out list, simply remove them from this group.

Following

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

Following An Individual

The first step is to identify people you know. You can do this by clicking the following link on an individual's *Person Profile* page.



Bulk Following

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

You can view a complete list of the people you follow under [Login Status > My Settings>](#)

[Following](#) (the login status can be found in the top-right corner of the page). From this list you can manage the people you follow and remove any that may have been accidentally added.

Viewing Followers

Name ▾

Following

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

Your Following List

<input type="checkbox"/>	Name	Birthdate	Email	Home	Mobile	Spouse
<input type="checkbox"/>	Phil Coffee	10/1/1983	pcoffee@fakeinbox.com			
<input type="checkbox"/>	Cindy Decker	3/10/1980	cindy@fakeinbox.com	(623) 555-3323	(623) 555-3323	Ted Decker
<input type="checkbox"/>	Ted Decker	2/10/1979	ted@rocksolidchurchdemo.com	(623) 555-3322	(623) 555-3322	Cindy Decker
<input type="checkbox"/>	Mariah Jackson	1/11/1980	mariah@fakeinbox.com			
<input type="checkbox"/>	Bill Marble	2/28/1964	bill.marble@fakeinbox.com			Alisha Marble

5 Followings

Unfollow

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

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

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

Following Event Settings

Name

Following Settings

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

Following Events

Person Events

☐ Baptisms
Person was recently baptized

☐ Began Serving
Person recently began serving

☒ Birthdays **required**
Person with a birthday today (or this weekend)

☐ Joined Small Group
Person joined a small group

☐ Prayer Requests
Person submitted a public prayer request

☐ Upcoming Anniversaries
Person with an upcoming anniversary

☐ Upcoming Birthdays
Person with an upcoming birthday

Save

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

Following Event Email

Ted,

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

Upcoming Birthdays

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

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

Birthdays

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



Home: (623) 555-0135



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

Email: ben@rocksolidchurchdemo.com

Cell: (602) 555-5588

Home: (602) 555-5588

Upcoming Anniversaries



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

Email: alisha@rocksolidchurchdemo.com

Cell: (602) 555-1804

Home: (623) 555-0135

Baptisms



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

Email: sarah@rocksolidchurchdemo.com

Cell: (602) 555-1804

Home: (623) 555-0135

Began Serving



Pam Foster recently began serving.

Email: pam@rocksolidchurchdemo.com

Cell: (602) 555-1804

Home: (623) 555-0135

Rock Solid Church

rocksolidchurchdemo.com

(623) 555-2444

info@rocksolidchurchdemo.com

[Follow us on Twitter](#)

[Friend us on Facebook](#)

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

Add Following Event Type

Name **1** Active **2**

Description **3**

Event Type **4**

Notice Required **5**

Send Weekend Notices on Friday **6**

Notification Format **7**

Save Cancel

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1 Name

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

2 Active

Whether the event is currently active.

3 Description

A brief description of the event.

4 Event Type

The type of event you are configuring. Choose from the following options:

- Person Anniversary
- Person Baptized
- Person Birthday
- Person First Attended Group Type
- Person First Joined Group Type
- Person History

Person History is an advanced tool that can be configured to provide powerful following recommendations. To learn more about this option, see the [Person History Following Event](#) section below.

5 Notice Required

This setting defines whether the follower gets to choose if they will receive this event. Sometimes they should be given the option; other times you know what's best for them.

6 Send Weekend Notices on Friday

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

7 Notification Format

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

Never Forget A Birthday

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

[Guide](#).

Person History Following Event

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

Following Event Configuration

Name

Following Event

Home > System Settings > Following Events > Following Event

Add Following Event Type

Name
1
Active
6
☒

Description
2

Event Type
3
Person History

Notice Required
4
☐ Yes

Send Weekend Notices on Friday
5
☒ Yes

Fields
7

Max Days Back
8
30

Changed By

Negate Person
9
No

Person
10

Values

Match Both
11
Yes

Old Value
12

New Value
13

Notification Format
14

Save Cancel

- 1 Name**
 The name of the event. This will also be used for the title on the email so it's best to use a plural form of the word.
- 2 Description**
 A brief description of the event.
- 3 Event Type**
 The type of event you are configuring. In this case, *Person History*.
- 4 Notice Required**
 This setting defines whether the follower gets to choose if they will receive this event. Sometimes they should be given the option; other times you know what's best for them.
- 5 Send Weekend Notices on Friday**
 No one wants their birthday to be missed because it's the weekend. This setting allows you to notify events that will occur over the weekend on the

Friday before.

6 Active

Whether the event is currently active.

7 Fields

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

8 Max Days Back

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

9 Negate Person

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

10 Person

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

11 Matches Both

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

12 Old Value

Value to be matched as the old value, or leave blank to match any old value.

13 New Value

Value to be matched as the new value, or leave blank to match any new value.

14 Notification Format

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

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

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

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

- Fields = Marital Status
- Match Both = Yes

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

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

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

Following Suggestions

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

Following Suggestion Type List

Following Suggestions
Home > System Settings > Following Suggestions

Suggestion List

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

50 500 5,000 5 Suggestions

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

To add a new suggestion type click the button at the bottom of the grid. This will bring up the page below.

Following Suggestion Configuration

- 1 Name**
This describes the suggestion and will be used as a title in the daily suggestion email that is sent out.
- 2 Active**
Whether the suggestion type is currently active.
- 3 Description**
A brief description of the suggestion.
- 4 Suggestion Type**
The type of suggestion that is being configured.
- 5 Reason Note**
A brief message that will be shown to the user describing why the person is being suggested to them.
- 6 Reminded Days**
The number of days to wait before notifying the person of this suggestion

again if they have not followed the suggestion. Leave it blank if the person should never be reminded.

7 Auto-Follow

This setting will turn the 'suggestion' into a required to follow. In other words the person will not be given the option to follow the individual, it will automatically follow.

8 Suggestion Type Settings

Note that each suggestion type will have its own configuration properties. The sample shows the *In Group Together* settings. Below is a guide to what these settings mean.

9 Notification Format

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

In Group Together and In Followed Group Settings

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

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

Reducing the Confusion

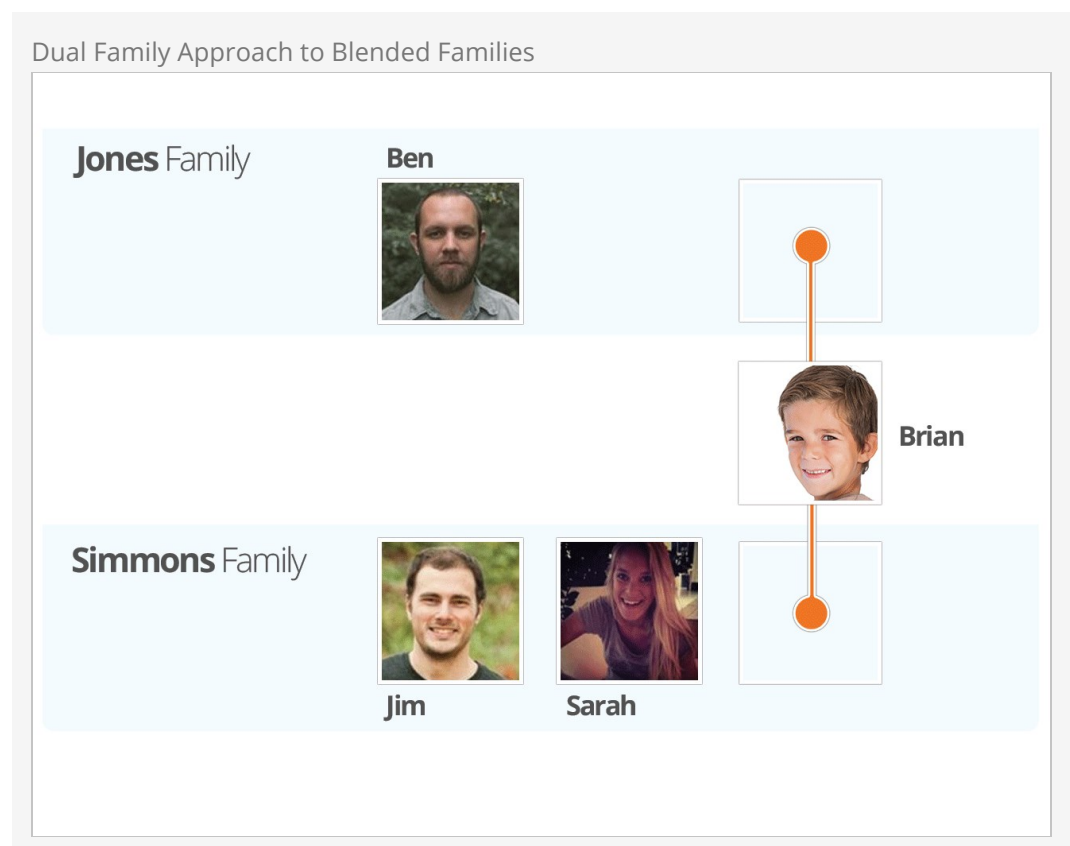
The settings above can be a bit confusing. Looking at the settings for the current suggestions can help reduce this confusion.

Strategies for Blended Families

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

Dual Family Approach

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



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

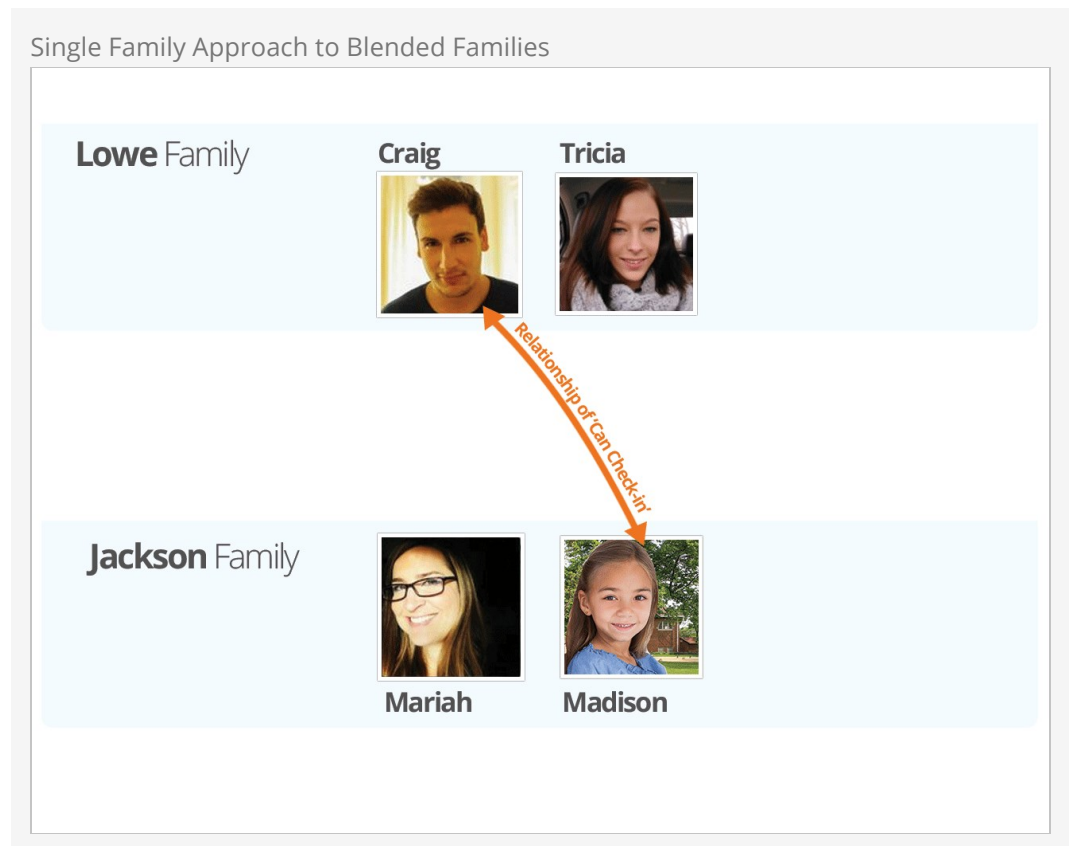
- In reporting, Brian will be listed as a single record. However, if your reports list

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

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

Single Family with Relationships Approach

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



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

What About Foster Families?

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