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 to 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 were 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).

Below are answers to common situations where people would want to delete a record.

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

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: I just added a duplicate record and want to delete the new one.

Instead of deleting the record you will need to merge it with the existing record. See the Duplicates section below on how to achieve this.

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

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 did add 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.

Smart Search Tool

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, we're assuming that you are 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 will 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 specific person. However, if more than one person was returned, you will see a list of

individuals. Select the correct one, and you will be taken to their *Person Profile* page.

Search Results for 'Decker'

Rock has a sophisticated algorithm for helping you find names even if you can't spel theem corectlly. 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, too. 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 their 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
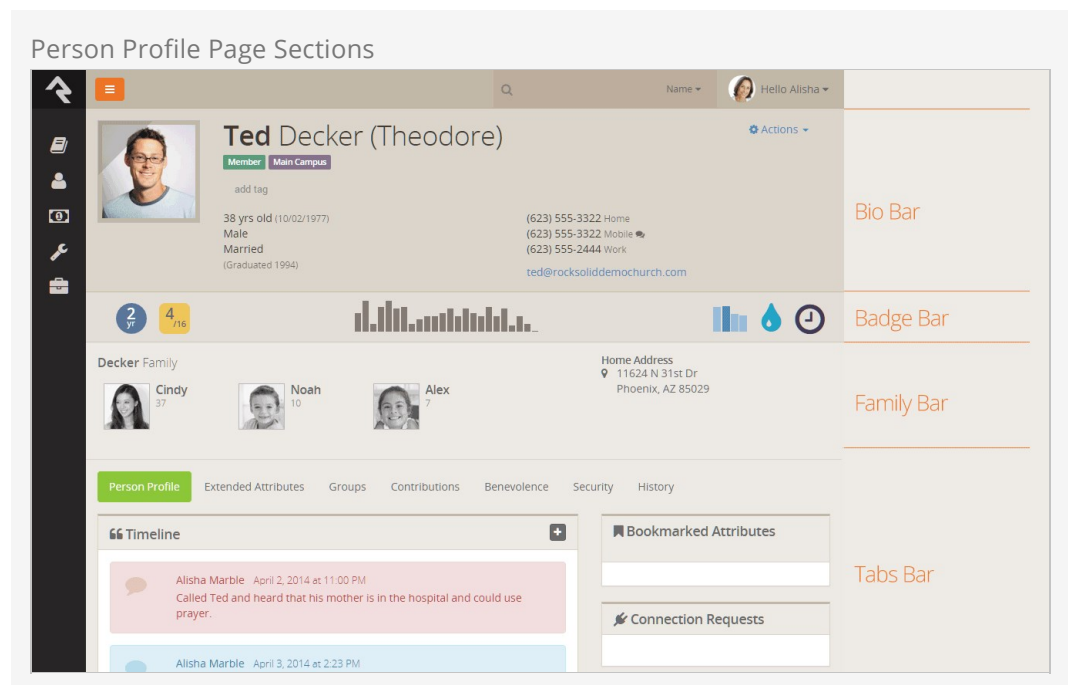
Bio Bar

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

Bio Bar

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 items with some light development:

- **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 recieve 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.

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

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. **DISC Profile**
   If the person has completed a DISC personality assessment the results can be seem here. For more information, see the chapter DISC Personality Assesment.

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.
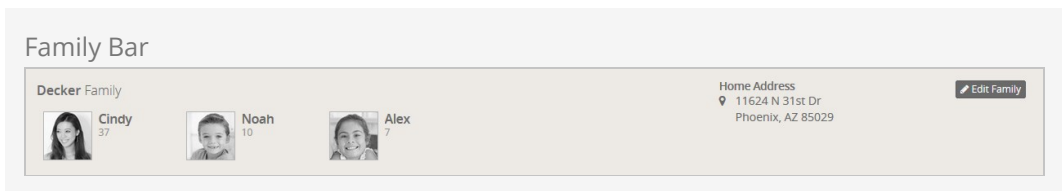
Family Bar

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.
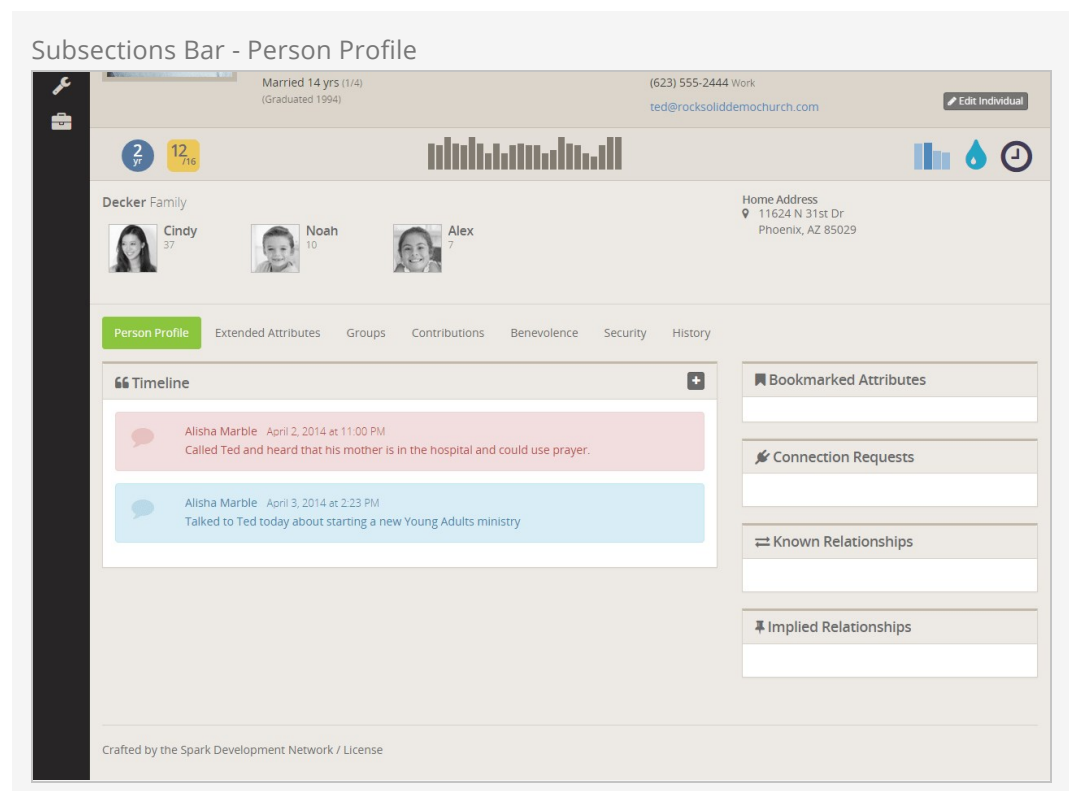
Person Profile Tab

The first tab is the *Person Details*, 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.

Bookmarks

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 ⚙ in the header. You can also edit the values of the attributes by clicking the ✏. Each person can also adjust the order of the attributes on their bookmark list by clicking the ☐ and then dragging the attributes into the desired order.

Connection Requests

This section shows a listed of Connection requests that have been made by the individual. You can read more about connection requests in the `Connection Guide`

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 ➕ on the *Known Relationship* header.
- Select the relationship type you wish to add from the dropdown.
- Finally, select the person that matches the relationship you are 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. As an example, if two people are in the same group, we can imply a relationship. Rock highlights these relationships in this section.

Extended Attributes Tab

The next subsection of the *Person Profile* page holds 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 pencil icon in the category header.

Extended Attributes Subsection

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 appearace of the attributes on the block by clicking this button and then dragging the attributes into the desired order.

4 Edit Button
To edit the values of the attributes in a category simply mouse-over the category and click the edit button when it displays.

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 lists all of the individual's groups. The grid lists important facts like the type of group, the individual's role in the group and the date they were added to the group.

Groups Subsection

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 reoccurring giving profiles, or edit existing ones.

Contributions Subsection

Security Tab

Rock takes security very seriously. From this tab you can see all of the security roles an individual is a member of. You can also add and delete security roles directly in this screen. Click the red ✖ button to delete an existing security role. Click the ➕ button

to add a new one. Next 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.

Rock also tracks who has looked at a person's record. On this tab you can see how often a person's record has been viewed by each individual as well as who this individual has viewed.

Security Subsection

History Tab

This final subsection on the *Person Profile* page shows a history of the person in Rock. It includes things like:

- Communication History: This lists all of the communications that have been sent to the individual.
- Attendance History: This lists all of the events and services that this person has attended.
- Person History: This lists all of the changes that have been made on the individual record. This is a helpful screen for identifying what was changed and who made the changes.

History Subsection

Editing An Individual

To edit the bio and contact information for an individual, click the *Edit Individual* link that appears as you mouse-over the Bio section of the *Person Profile* page. This is what you'll see.

Edit An Individual

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 you will 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.

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, and this is what you'll see.

Add A Family

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 as a *Defined Value* 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 entering 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 Add Family block settings.

Add Family Block Settings

1 Name
The name you want to give the block. The default is 'Add family'.

2 Group

The group type to display groups for. The default is 'Family'.

3 **Parent Group**
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 Middle Name**
Select Yes to display an edit box for Middle Name.

6 **Show Suffix**
Select Yes to display the person suffix.

7 **Enable Common Last Name**
Autofills 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 **Gender**
Should Gender be required for each person added?

10 **Birth Date**
Should a Birthdate be required for each person added?

11 **Grade**
When the group type is Family, should Grade be required for each child added?

12 **Show Inactive Campuses**
Determines if inactive campuses should be shown.

13 **Require Campus**
Select Yes if you want campus to be required.

14 **Adult Marital Status**
When the group type is Family, what should the default marital status for adults in the family be?

15 **Child Marital Status**
When the group type is Family, what should the default marital status for children in the family be?

16 **Marital Status Confirmation**
When the group type is Family, should the user be asked to confirm saving an adult without a marital status?

17 **Address**
Should an address be required for the family?

18 **Location Type**
The type of location that address should use.

19 **Show Cell Phone Number First**
Should the cell phone number be listed first before home phone number?

20 **Phone Number**
Should a phone number be required for at least one person?

21 **SMS**

Should SMS be enabled for cell phone numbers by default?

22 **Attribute Categories**
The Person Attribute Categories to display attributes from.

23 **Show Nick Name**
Select Yes to show an edit box for Nick Name.

24 **Person Detail Page**
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}.

Simply 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, but some organizations may want to capture additional information about the family. The good news is that you can have both!

If you look at the block settings of the *Family Entry* block, you'll notice that a setting for configuring attribute categories. When you pick one or more categories, the `Finish` button at the bottom of the page is renamed 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` will take 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 figure below walks through this use case with the *Education* and *Visitor Information* attribute categories set.

Adding Additional Attributes
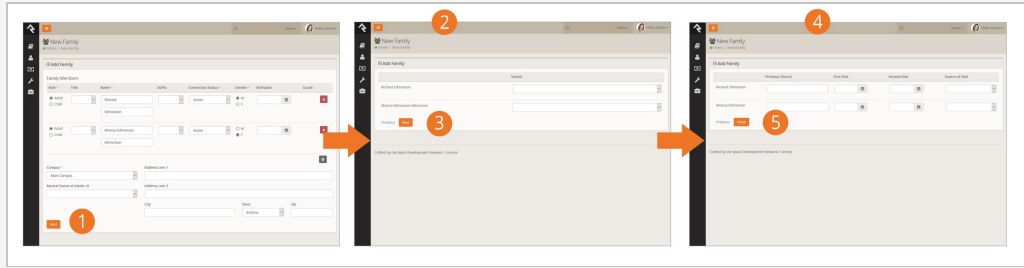
1. With the additional attribute categories added, the `Finish` button is renamed to `Next`.

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

3. Navigation buttons are present to go both forward and backward.

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

5. 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 your attribute is configured 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 possible duplicates Rock will display a listing of possible duplicates for those added to the family.

Possible Duplicates

New Family

Home / New Family

⊞ Add Family

Possible Duplicates!
One ore 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)

[Remove]

Possible Duplicate Records

Noah Decker

Child *(10 yrs old)*
Family Members: Ted, Cindy, Alex

Address
11624 N 31st Dr
Phoenix, AZ 85029

Previous [Confirm]

Crafted by the Spark Development Network / License

Editing A Family

To edit a family, click the `Edit Family` link displayed on the *Family Bar* when you mouse-over it. This will take you to the screen below.

Editing A Family

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 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.

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`.

Directory

Many smaller organizations like to have a directory of all the people in the database. This feature allows this and much, much more.
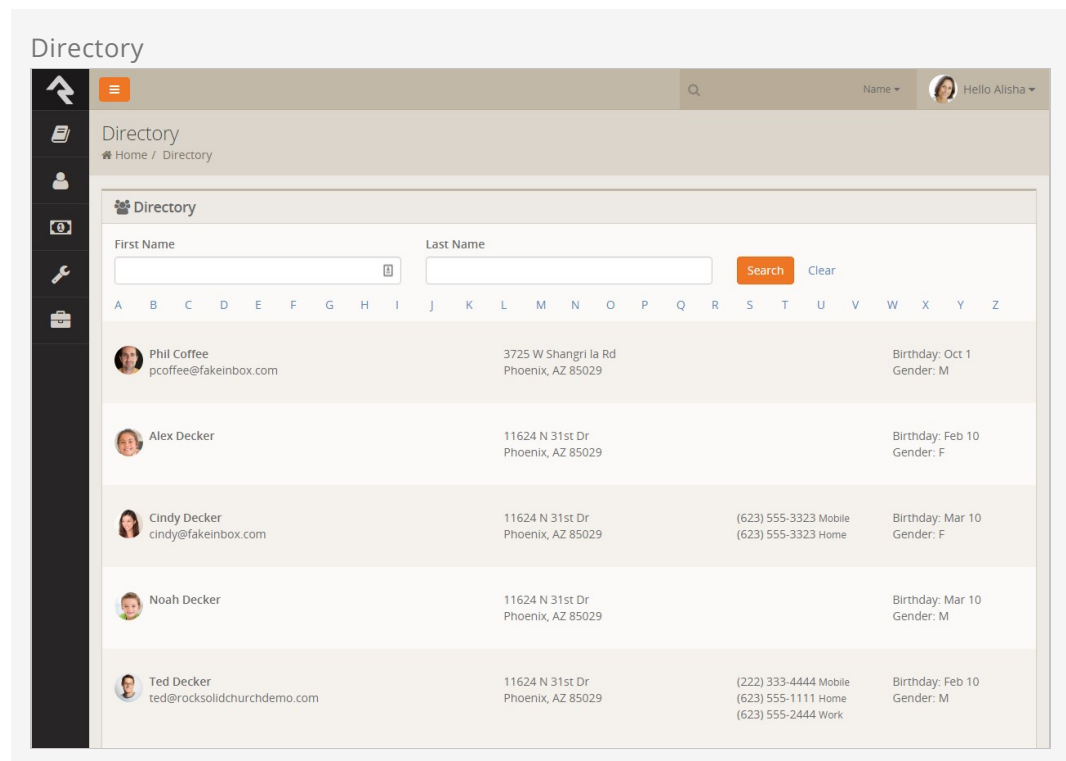
Out of the box, the directory is configured to display a simple search screen, but you can change the block settings to show the first 1500 people in the database if you prefer, as shown in the screen shot above. That's not all this block can do though. Let's check out all the features found under the block settings.

Block Settings

Setting	Description
Data View	The results of the directory are driven by a provided Data View. This gives you the power to use the block in many different ways. You may implement it to show *All Members and Attendees* (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

Setting	Description
	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 *First Name* 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	Whether the email field should be displayed.
Show Address	Whether the address field should be displayed.
Show Phones	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	Whether the gender field should be shown.
Show Grade	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. 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

1 **Select Records**
First select the records you wish to merge.

2 **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	Decker Family (Ted) ☐ Last Modifed 3 Minutes Ago by Alisha Marble
Photo	◉	○
First Name	◉ Theodore	○ Ted
Connection Status	◉ Member	○ Visitor
Marital Status	◉ Married	○
Birth Date	◉ 10/02/1977	○
Graduation Year	◉ 1994	○
Email	◉ ted@rocksoliddemochurch.com	○
Phone Numbers		
Mobile	◉ (623) 555-3322	○
Home	◉ (623) 555-3322	○
Work	◉ (623) 555-2444	○
Person Attributes		
Background Check Date	◉ 10/04/2010	○
Employer	◉ Rock Solid Church	○
Facebook	◉ http://facebook.com/sample	○
First Visit	◉ 15/12/2012	○
Position	◉ Outreach Pastor	○
Adaptive D	◉ 28	○
Baptism Date	◉ 13/09/2001	○
Twitter	◉ http://twitter.com/sample	○
Adaptive I	◉ 46	○
Instagram	◉ http://instagram.com/sample	○
Adaptive S	◉ 21	○
Adaptive C	◉ 8	○
Natural D	◉ 28	○
Natural I	◉ 29	○
Natural S	◉ 20	○
Natural C	◉ 18	○
DISC Last Save Date	◉ 02/02/2013	○
Personality Type	◉ ID	○

Merge Records

Crafted by the Spark Development Network / License

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 chose 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. Note that this will update the value for the family, which will affect every member of that family. If either person being merged has more than one family, only the attribute values of the first family are considered. To learn more, 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.

Merge Request
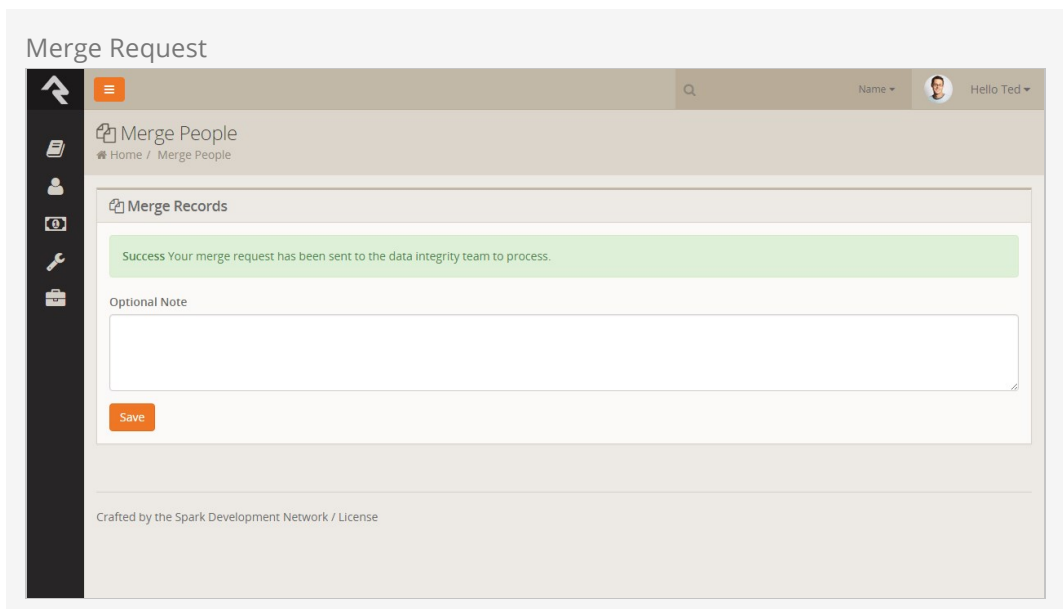
> **Merging Records Without Enough Security Rights**
>
> If you have access to merge but don't have enough security access to view things such as attributes, you won't be able to choose which item survives when the records are merged. Rock will take the value from the primary person/family you choose 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*.

> ### Tip
> Use the notes to document the reasons for the changes. While it may seem obvious now, it won't in a couple of weeks.

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** ➕

1 Alisha Marble   14 seconds ago
Please see staff before connecting to a serving team.

2 Alisha Marble   April 3, 2014 at 2:23 PM
Talked to Ted today about starting a new Young Adults ministry

3 You - Personal Note   April 2, 2014 at 11:00 PM
Called Ted and heard that his mother is in the hospital and could use prayer.

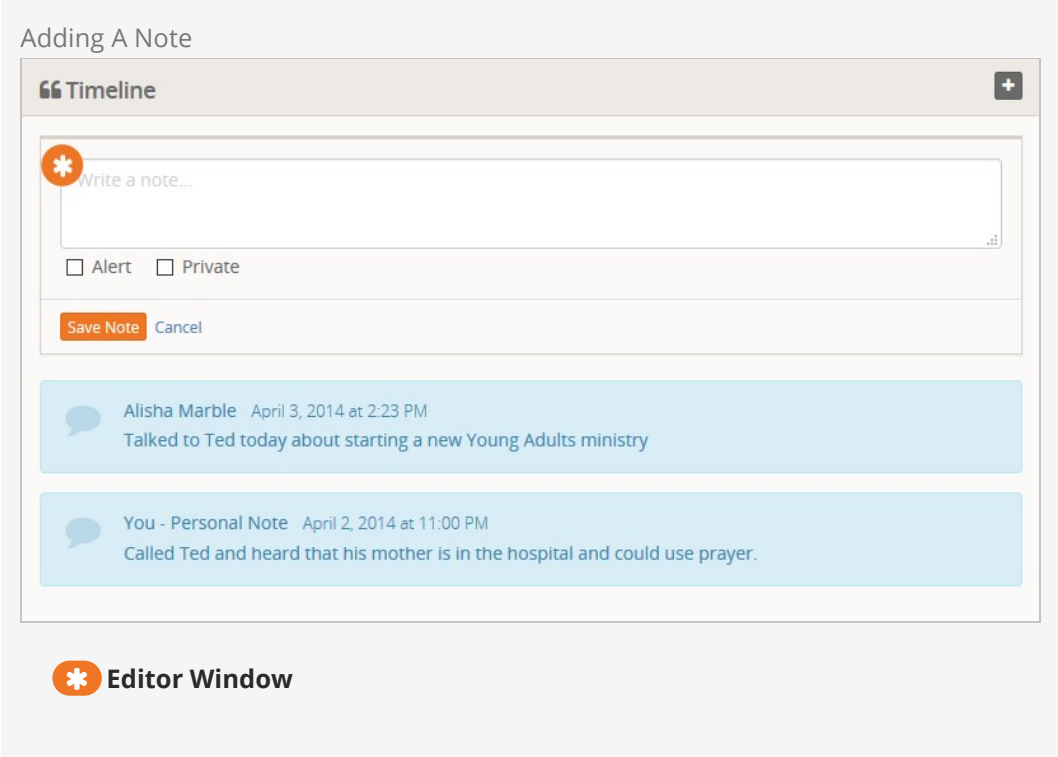**1** **Alert Note**
Used to warn viewers of important topics. These note types will always remain at the top of the list.

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

✳ 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 Badges

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.

Alert Note

Alert Note Badge

Ted Decker (Theodore)
Member | Alert Note Exists | Main Campus

This badge displays when an 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.

Attending Duration

Attending Duration Badge

Showing all states (new, in weeks, in months and years.)

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*.
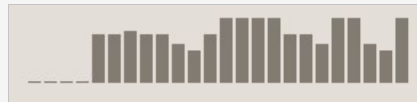
16 Week Attendance

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 your 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

Baptism Duration Badge

Showing enabled and disabled state.

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

Serving Badge

Showing enabled and diabled state.

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.
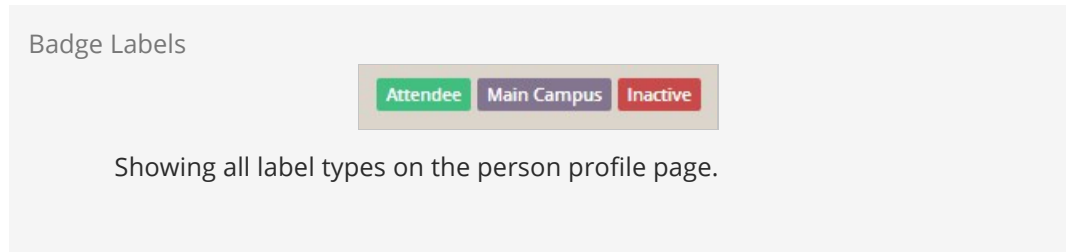
eRA Badge

eRA Badge

Is eRA   Was Recently eRA   Is Not eRA
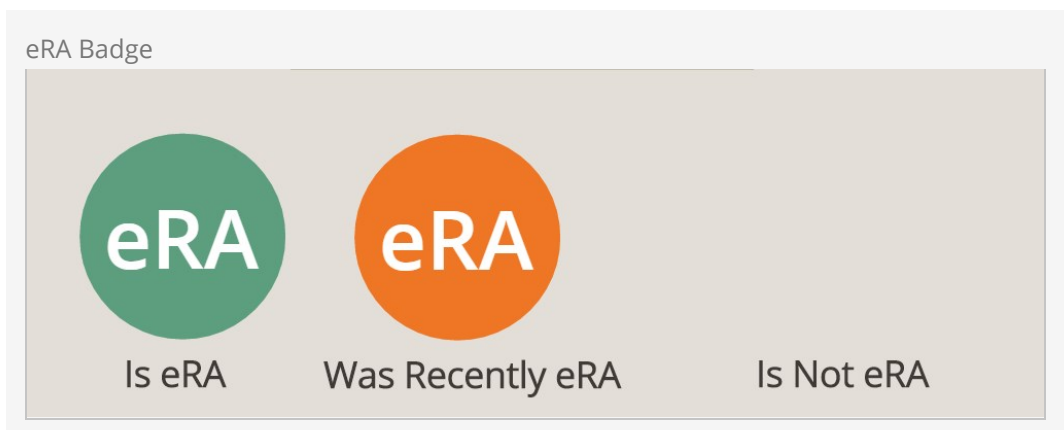
This badge shows the eRA status of the current person. See the `Person And Family`

`Analytics` chapter for more information on this badge.

Labels

Badge Labels

Attendee Main Campus Inactive

Showing all label types on the person profile page.
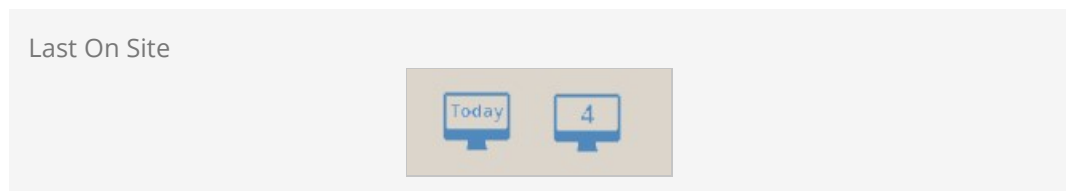
Each label in the *Bio Bar* indicates a separate badge. These badges show:

- **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.

Adding A New Badge

Hopefully you are able to realize value in the badges we have pre-configured for you. We're sure though that you are already thinking of items you'd like to add. Luckily we have made adding badges easy.

There are two steps in adding a badge to the *Person Profile* page.

1. Define the badge you wish to add.
2. Add the badge to one of the badge containers on the *Person Profile* page.

Let's walk through each step.

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

Add Badge Screen

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.

Geofenced By Group

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

Campus Badge

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.

Attending Duration

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

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.

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.

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.

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.)

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.

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 ⊞ from 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 Save .

Adding Badge to Person Profile Page

| Block Properties	×

Basic Settings   Advanced Settings

Name *

Badges 1

Badges *

☐ Connection Status ☐ DISC Personality Assessment Result ☐ Campus ☐ Inactive Record Status ☑ Last Visit on External Site ☑ Attending Duration
☐ Family Attendance ☑ Family 16 Week Attendance ☐ Baptism ☐ In Serving Team

Save   Cancel

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.
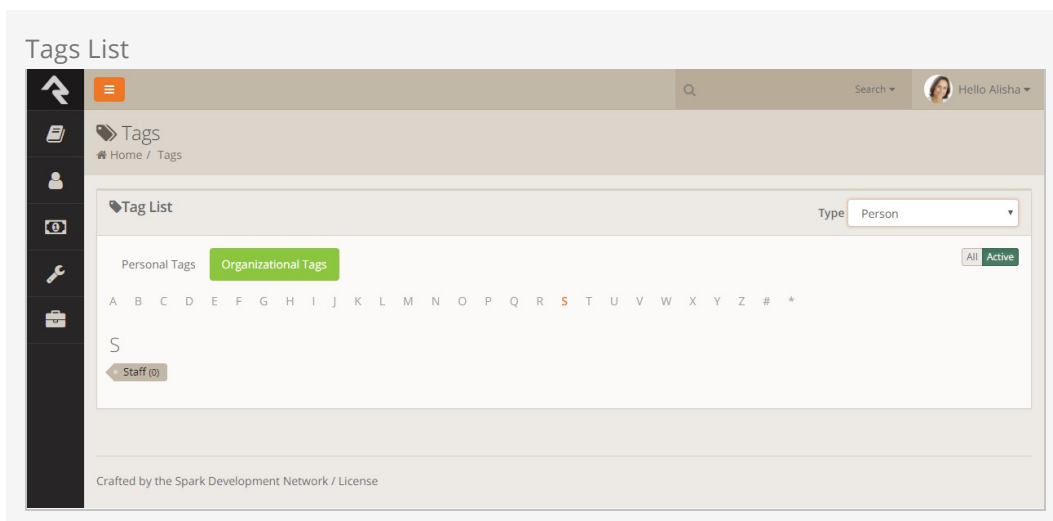
Your Tags vs. Our Tags

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`.

Tags List

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.

My Pages

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

Finding My Settings
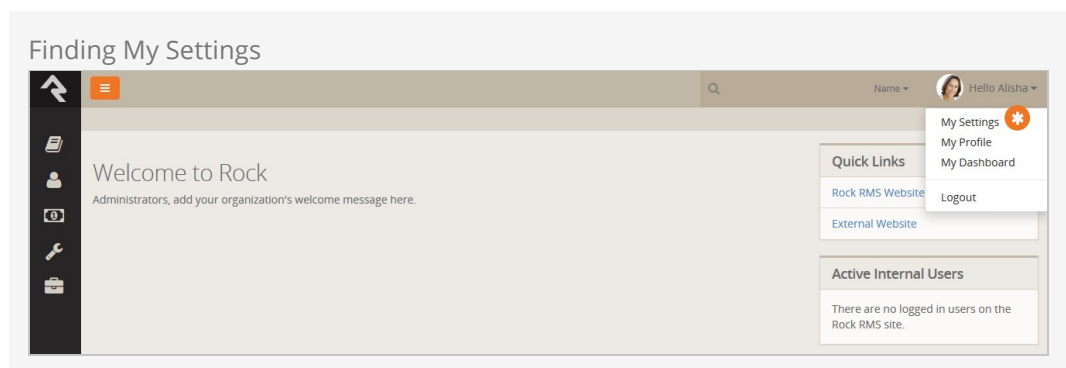
My Settings

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.
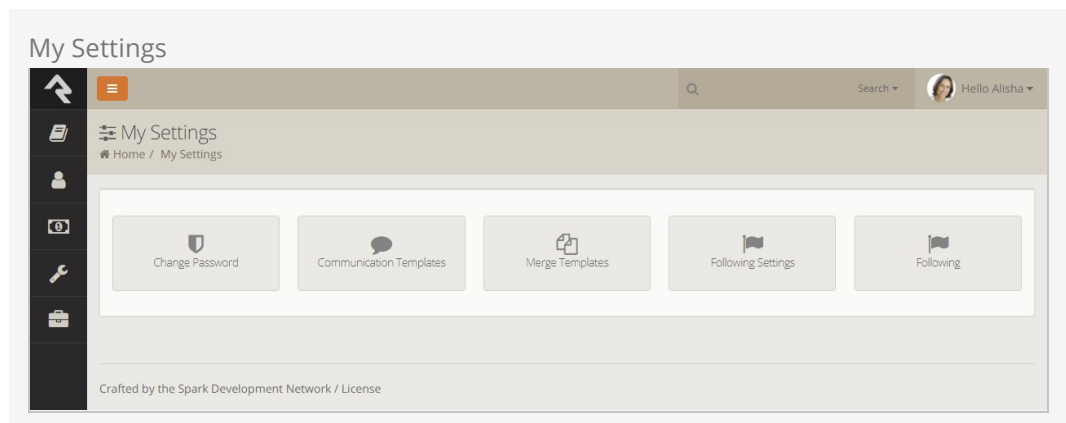
My Settings

My Dashboard

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

My Settings

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.

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 martial 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:
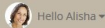
- Is there already a common person element or person attribute that exists? You'd be surprised how many duplicate attributes get created.
- Is the attribute related to a specific group? If so, consider making it a group member attribute.
- Is this attribute really needed? While there are a great many 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

Add and manage attributes for each person person

Attribute List

Filter Options ⌄

Id	Name	Categories	Default Value		
553	Ability Level	Childhood Information		🔒	✕
1274	Adaptive C	DISC		🔒	✕
1271	Adaptive D	DISC		🔒	✕
1272	Adaptive I	DISC		🔒	✕
1273	Adaptive S	DISC		🔒	✕
676	Allergy	Childhood Information		🔒	✕
1298	Background Check Date	Safety & Security		🔒	✕
1300	Background Check Document	Safety & Security		🔒	✕
1297	Background Checked	Safety & Security		🔒	✕
1299	Background Check Result	Safety & Security		🔒	✕
174	Baptism Date	Membership		🔒	✕
714	Baptized Here	Membership	N	🔒	✕
740	Employer	Employment		🔒	✕
969	Facebook	Social Media		🔒	✕
717	First Visit	Visit Information		🔒	✕
971	Instagram	Social Media		🔒	✕
1279	DISC Last Save Date	DISC		🔒	✕
715	Legal Notes	Childhood Information		🔒	✕
906	Membership Date	Membership		🔒	✕
1278	Natural C	DISC		🔒	✕
1275	Natural D	DISC		🔒	✕
1276	Natural I	DISC		🔒	✕
1277	Natural S	DISC		🔒	✕
1358	Personality Type	DISC		🔒	✕
741	Position	Employment		🔒	✕
716	Previous Church	Visit Information		🔒	✕
739	School	Education		🔒	✕
718	Second Visit	Visit Information		🔒	✕
719	Source of Visit	Visit Information		🔒	✕
970	Twitter	Social Media		🔒	✕

| 50 | 500 | 5,000 | 30 settings |

Name ⌄   Hello Alisha ⌄

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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.)

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

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 *Baptized Here* 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. *Martial Status*, *Phone Type*, *Record Status* 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 *File Type*. You can read more about this in the `Admin Hero Guide`. When considering storing files in Rock keep in mind the storage implications of the files you'll be adding to the system.
HTML	Allows you to store a fragment of HTML that 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-	Allows you to specify a list of values that multiple items can be selected

Field Type	Description
Select	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 *Value:Label* (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 *Person* 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.

Person Attribute Forms Settings

1 **Display Progress Bar:**
If you are going to configure this block with multiple forms, you can optionally have a progress bar displayed at the top of each page that gives a visual indication to the 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.

Field Settings

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 if you want 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 if you want 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.

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

2. **Reveal Button:**
   Selecting this button will toggle showing/hiding the additional family attributes.

3. **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` .

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	No
eRA Start Date	3/22/2013
eRA End Date	3/30/2016
First Checked-In	12/30/2012
Last Checked-In	3/13/2016
First Gave	1/6/2013
Last Gave	3/6/2016
Times Checked-In (16 wks)	24
Times Given (52 wks)	11
Times Given (6 wks)	1

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.

eRA Badge

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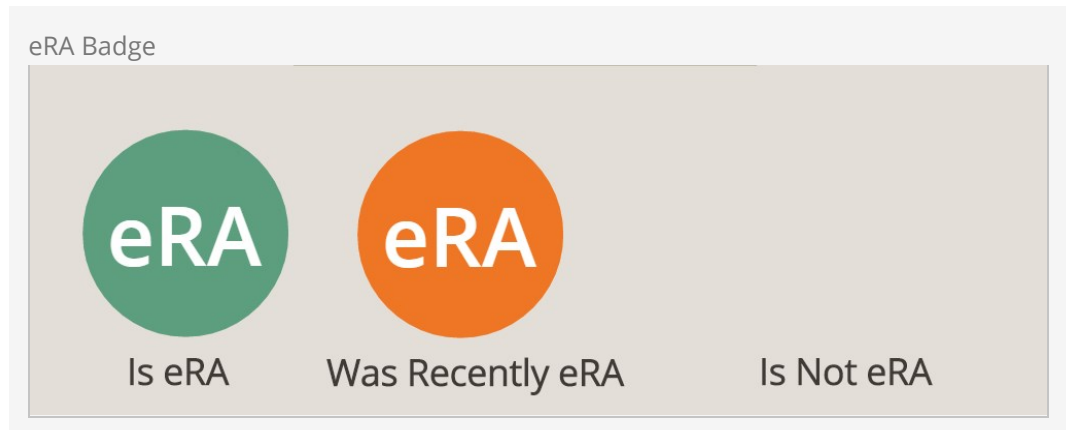
- **Is eRA:** The person currently is an eRA
- **Was Recently eRA:** Was an eRA but exited the eRA criteria in the last 30 days.
- **Is Not eRA:** Does not meet the eRA criteria. This badge is simply blank.

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).
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 running. 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 active 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.

Here Are Your Tools

① Workflows
Enables eRA entry and exit workflows to be configured.

② Group Type History
Select any group types that you would like to store history for. When enabled new history records will be written to a person record whenever they start being in a group of this type or stopping being in a group of this type. If the person is in multiple group of a specific type it will only write a record when they leave all of the groups.

③ Set Visit Dates
When enabled this will enter the first and second visit person attributes. The logic for this is fairly complex as it considers only attendance. It also considered when the 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:
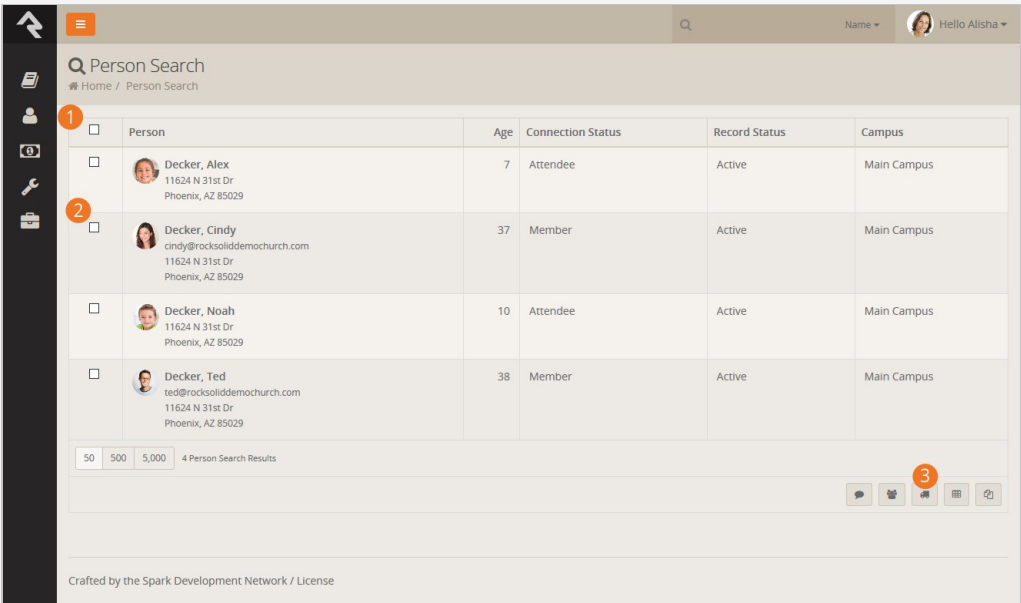
1. Comparing the current date to their graduation year which provides an offset in years (Rock also uses the *Grade Transition Date* Global Attribute to help determine the start of the school year).
2. The year offset from step 1 is then compared with the grades in the *School Grades* defined type. The 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

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.

Select Individuals for Bulk Updates

1 You can add or remove individuals from the *Selected Individuals* section.

2. 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. You can add notes using the bulk update tool.

4. 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 Confirm
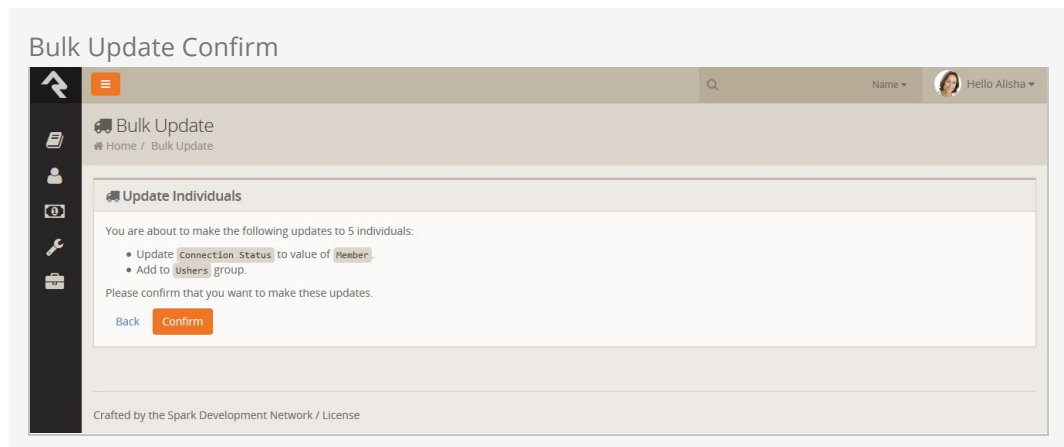
Person Profile Editor

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

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 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 Request Process

| Staff Member Requests Photo | Email Sent to Individual | Individual Clicks Link and Uploads Photo | Photo Verified |

1. Staff sends out a photo request. This request, as we'll learn soon, can be an individual request to a single person, or a bulk request.

2. An email is sent to the individual asking for them to upload a photo.

3. Once they click the link in the email, they'll be taken to a page where they can quickly upload a photo.

4. Once the photo is uploaded, it's added to a list for a staff person to verify.

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.
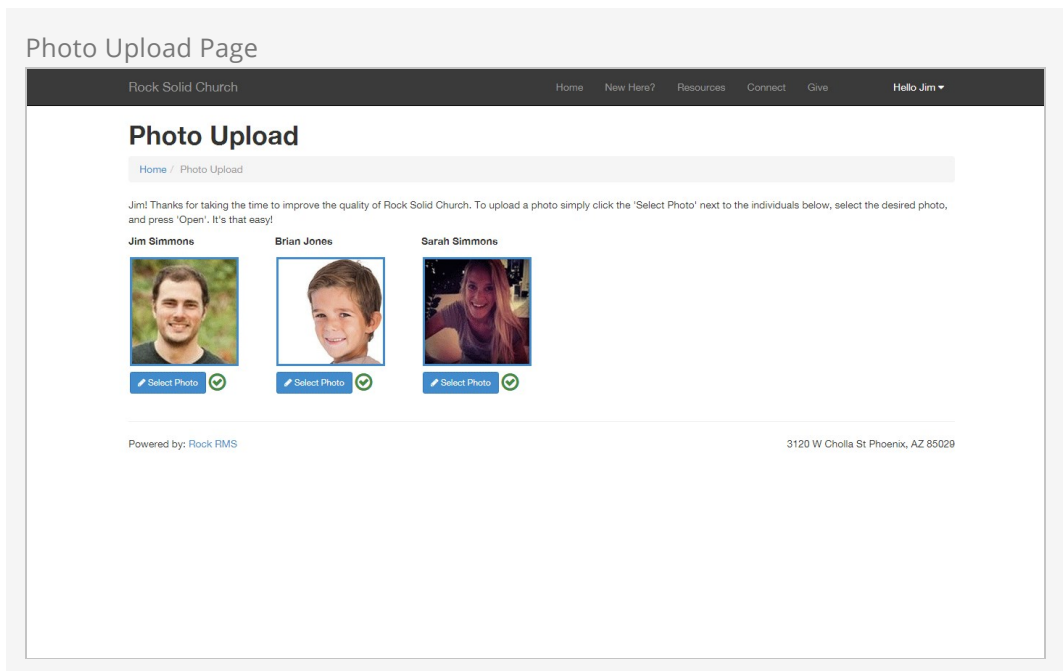
Photo Upload Page

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.

Photo Request Send

① Select if you want requests to go out to adults and/or children.

② If you allow requests to be sent children, you can provide a minimum age for the selection.

③ Select the *Connection Statuses* you'd like to use as a filter.

④ 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 It's often a good idea to send yourself a test email to see what that recipients will be sent.

⑥ 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 💬 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

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 the verify button.

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.

DISC Personality Assessment

We're excited to bring you the concept of a completely free personality-profiling tool. Because many organizations have been paying per-use for DISC tests for years, Rock's free assessments will literally put money back in your pocket while working to strengthen your team.

Additionally, a no-cost model also makes it financially feasible to collect DISC profiles from anyone in your database! Imagine what that means for your client communications when you pair personality-profiling knowledge with Rock's customizable workflows and Lava web messaging! You will be able to personalize your clients' experiences and communications in ways you've never before imagined. Just think of the implications. Let's see how it works.

Why DISC?

So, with all the personality tools available, why does Rock exclusively offer DISC? And what exactly is a DISC assessment? We have answers for all your questions here.

Test Concept

The DISC assessment is similar to many other quadrant-style personality profiles. You may have seen some that divide all personalities into four types or combinations of those types. Some tests show results as colors or animals. DISC takes that same concept, but uses letters to stand for each personality type.

Here's a quick look at the four main types and some adjectives that describe them:

- **D:** dominant, driving, determined
- **I:** inspirational, impressive, influencing
- **S:** steady, stable, specialized
- **C:** cautious, competent, consisent

Rock's DISC test delivers 16 different results that take into account letter types and combinations of any two. We'll talk more about what each of these means in detail in the chapter below.

Organizational Benefits

Because there are only four types (and their combinations), DISC results are easy to remember and simple to apply in the context of a team or structured messaging. While some assessments have a greater number of results and more complex typing patterns, the goal of personality-profiling in Rock is to simplify. Instead of delivering long, complicated and highly-individualized results, Rock's DISC assessment was created

to support the application's focus on groups, group management, and customizable group experiences.

Not only that, but the DISC profiling tool has major implications for screening potential staff, encouraging emotional intelligence, developing strong interpersonal relationships, predicting leadership behaviors and solving problems.

Once you get started, you'll see how easy it is to understand individuals in a new light, remember their profile results and apply that knowledge for results.

How Can This Be Free - I Thought DISC Was Copyrighted?

The DISC theory was originally created and published in 1928 by psychologist William Moulton Marston to describe people's behavior and emotions. His book *Emotions of Normal People* describes his four behavior type categories: Dominance, Inducement, Submission and Compliance. These four types indicate whether people see their environments as favorable or unfavorable, as well as their own sense of control over that environment. According to Wikipedia, Marston broke the categories up like this:

- **(D) Dominance:** Perceives oneself as more powerful than the environment, and perceives the environment as unfavorable.
- **(I) Inducement:** Perceives oneself as more powerful than the environment, and perceives the environment as favorable.
- **(S) Submission:** Perceives oneself as less powerful than the environment, and perceives the environment as favorable.
- **(C) Compliance:** Perceives oneself as less powerful than the environment, and perceives the environment as unfavorable.

Marston's theory contributed to the creation of the DISC test, but he didn't intend for it to be an assessment when he published it so he never copyrighted this work. So, for us, that means the DISC tool is available in the public domain.

However, although the DISC concept isn't copyrighted, most assessments and related resources are. Fortunately Dr. Greg Wiens from Healthy Growing Leaders has formulated an open-source assessment that he has graciously allowed to be used in Rock.

The Invitation

Now that we understand the concept and have a hint at the possibilities awaiting us once we've collected that information, let's look at how to begin. The process starts with a simple invitation.

Sending Invitations

Emailed invitations to take a Rock assessment are initiated by a Rock Administrator. There are two ways to do this. The first way sends an invitation to one individual. This is a great solution if you add a new member to your team and would like to collect their information at that time. The second method involves sending a mass invitation to a group of people. This is really helpful if you need to collect DISC results from a group and don't want to spend the time going into each profile to send individual invites.

Single Invites

To send a single invitation, a Rock Administrator needs to go to the *Person Profile* page of the individual they want to invite. In the upper right corner of the page is a drop down `Actions` menu. Select `DISC Request` to initiate the email.

Single DISC Request

You'll be taken to a *DISC Request* screen that allows you to customize the message before it is sent. Once you've made any updates, click on `Send`. You've done it! Pretty simple, right?

DISC Request Email

Group Invites

There may be times when you would like to send a DISC assessment request to a group of individuals. Adding the Lava clip below to any communication will provide a personalized link to the DISC assessment allowing the individual to take the assessment

and have the results added to their record in Rock.

{{ 'Global' | Attribute:'PublicApplicationRoot' }}/DISC/{{ Person.UrlEncodedKey }}
(outputs a link like http://yourexternalwebsite.com/DISC/a-unique-key-for-the-individual)

Customizing the DISC Invitation Message

While Rock ships with a personalized message in the invitation, it's possible you'll want to customize that message for your organization. If you'd like to change the whole message (or the default person text) you can do so by editing the workflow `Admin Tools > General Settings > Workflow Configuration` (the workflow is under `Data Integrity > DISC Request`).

DISC Workflow Settings
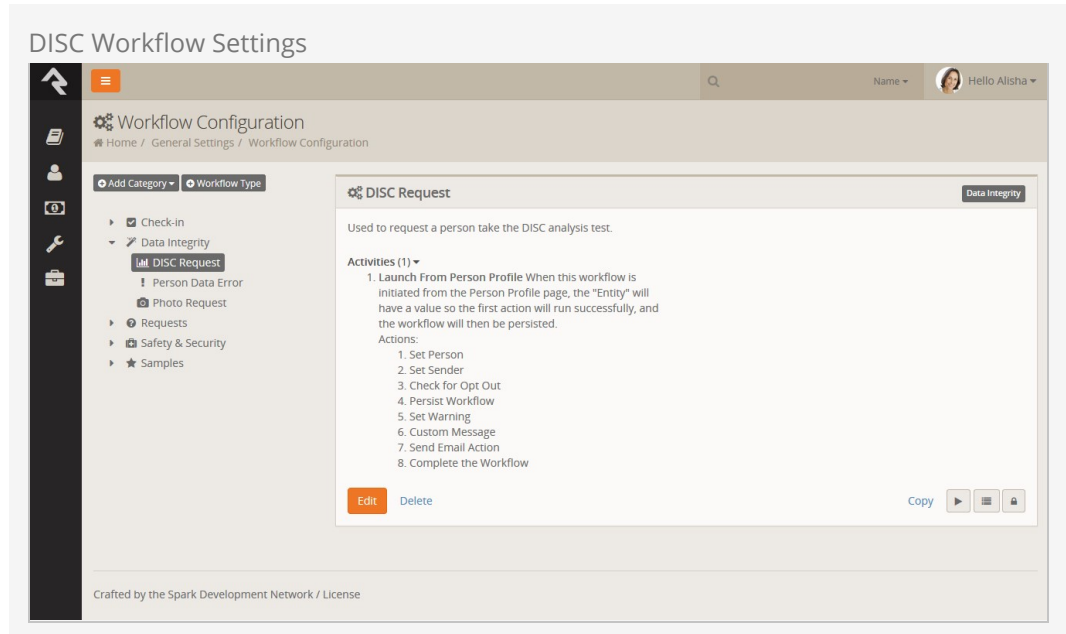
The Assessment

Taking the Assessment

When a user clicks the emailed link to take the DISC assessment, they will be taken to a welcome screen with instructions on taking the test.

After they read the message and click `Start` , they will see an assessment screen with 30 questions. For each question, there are four options. They are required to select which phrase is *most* like them and which is *least* like them.

DISC Workflow Settings

Displaying the Results

When they've completed the test, they click `Score` to receive their results. Their DISC Results page will be displayed.

1. Graph to illustrate the results for each of the four types and show which one or two types are scored above *mid-line*.

2. Complete written assessment of that particular personality type. This includes results in each of these categories:

a. Description

b. Strengths

c. Challenges

Viewing Results in Profile

A Rock workflow automatically updates the *Person Profile* page with DISC results, as well. The Badge Bar will display a graph on the far right side. Hovering your mouse over the graph will give you a quick description of their results.

DISC Workflow Settings

Clicking on the badge will take you to that person's *DISC Results* page, where you will be able to view the same full graph and a more complete description of their personality profile, including:

1. Graph to illustrate the results for each of the four types and show which one or two types are scored above *mid-line*.

2. Complete written assessment of that particular personality type. This includes results in each of these categories:

   a. Description

   b. Strengths

   c. Challenges

   d. Under Pressure

   e. Motivation

   f. Team Contribution

   g. Leadership Style

   h. Follower Style

Catalog of Types

Each type has a lengthy write-up, but here is an exhaustive list of the Rock DISC type results and a brief description of them, as a comparison.

| Type	Description
D	Strong-willed, independent and determined, **D**s are energetic and task-oriented.
DI	Independent, curious and likeable, **DI**s are energetic and have a balance of people and task orientation.
DS	Independent, creative and objective, **DS**s are steady and have a balance of people and task orientation.
DC	Energetic, focused and quick-thinking, **DC**s are consistent and task-oriented.
I	Positive, friendly and enthusiastic, **I**s are energetic and people-oriented.
ID	Outgoing, motivating and respected, **ID**s are energetic and people-oriented.
IS	Patient, hard-working and understanding, **IS**s are steady and people-oriented.
IC	Optimistic, trusting and inspiring, **IC**s are consistent and have a balance of people and task orientation.
S	Warm, friendly and easy-going, **S**s are steady and people-oriented.
SD	Determined, calm and independent, **SD**s are energetic and task-oriented.
SI	Warm, sympathetic and friendly, **SI**s are steady and people-oriented.
SC	Supportive, thorough and dependable, **SC**s are steady, consistent and people-oriented.

Type	Description
C	Precise, analytical and consistent, **C**s are consistent and task-oriented.
CD	Determined, precise and sociable, **CD**s are energetic and task-oriented.
CI	Observant, positive and loyal, **CI**s are competent and have a balance of people and task orientation.
CS	Friendly, precise and conscientious, **CS**s are competent, steady and task-oriented.

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.

Following An Individual
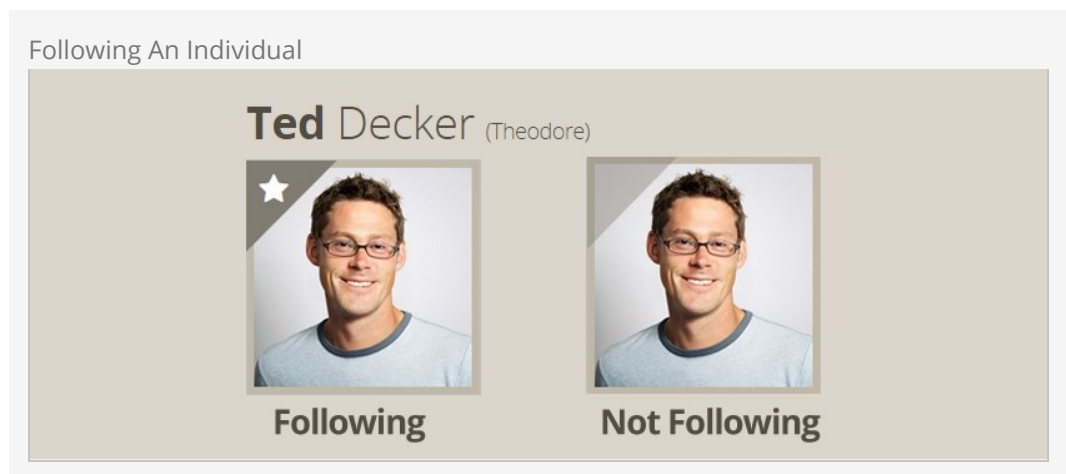
Bulk Following

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.

Following Bulk Update
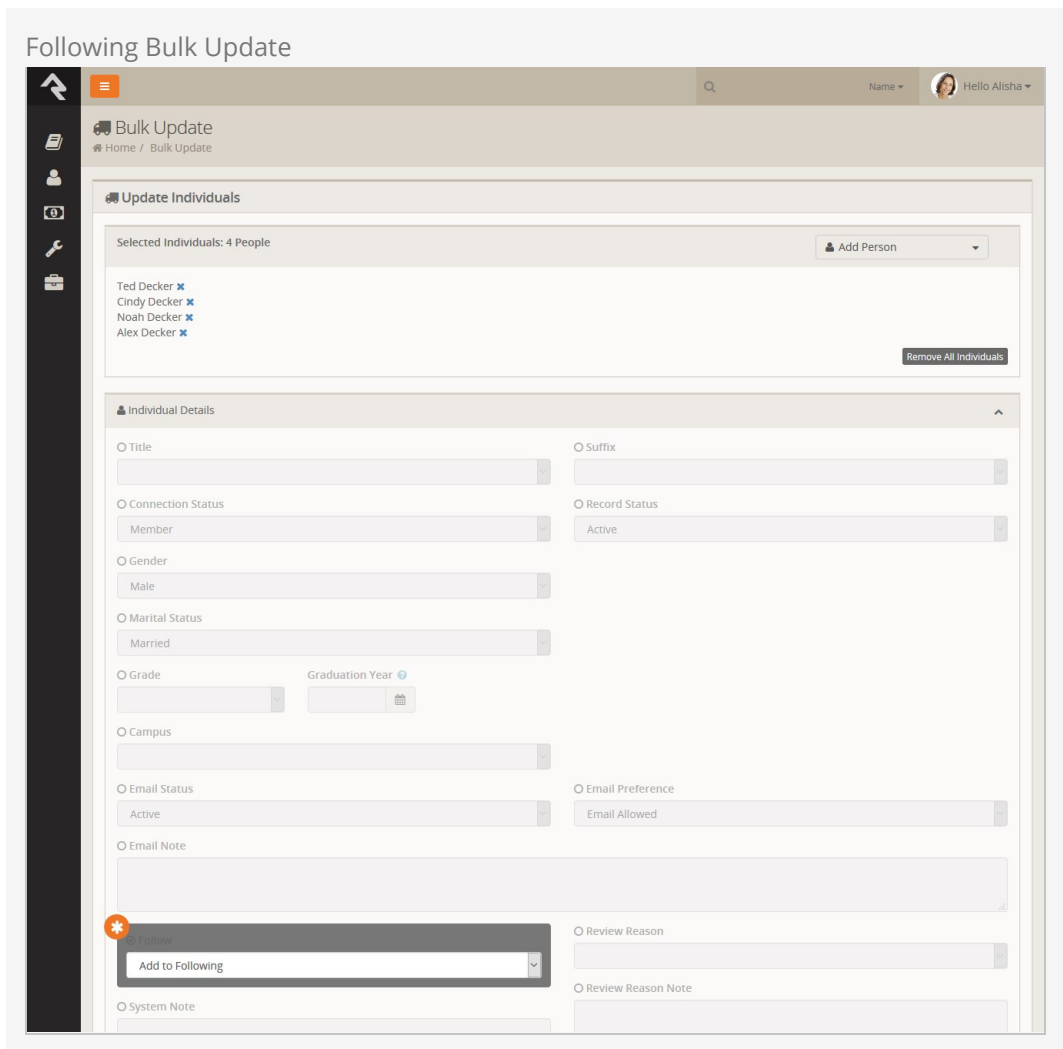
Viewing Those You Follow

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

Viewing Followers

Just The Beginning

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

Engaging Following

OK, now that you 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

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

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   Follow us on Twitter

rocksolidchurchdemo.com   Friend us on Facebook

(623) 555-2444

info@rocksolidchurchdemo.com

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

Configuring Following Events

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

Following Event Type List

To add a new event click the ⊕ from the bottom of the grid.

Following Event Configuration

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. For learn more about this option, see the Person History Following Event section below.

5 Event Type Settings
Each event type will define unique settings.

6 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.

7 **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.

8 **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

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 specifiy which fields in the history data to monitor. Seperate 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 a 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

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 ⊕ from 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 limitor 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.

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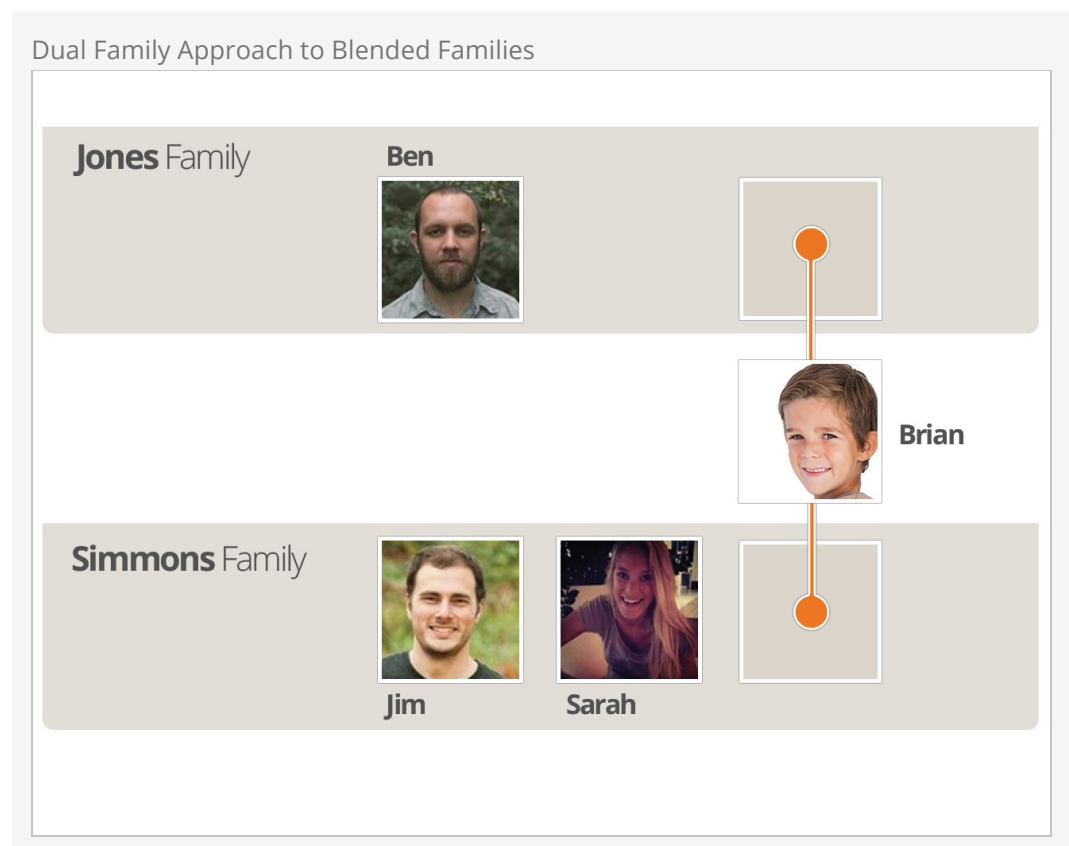
In this example Brian, the child, is in both families. He is still one record in the database, but he is a member of both families. This approach has some details you should know about.

- 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).

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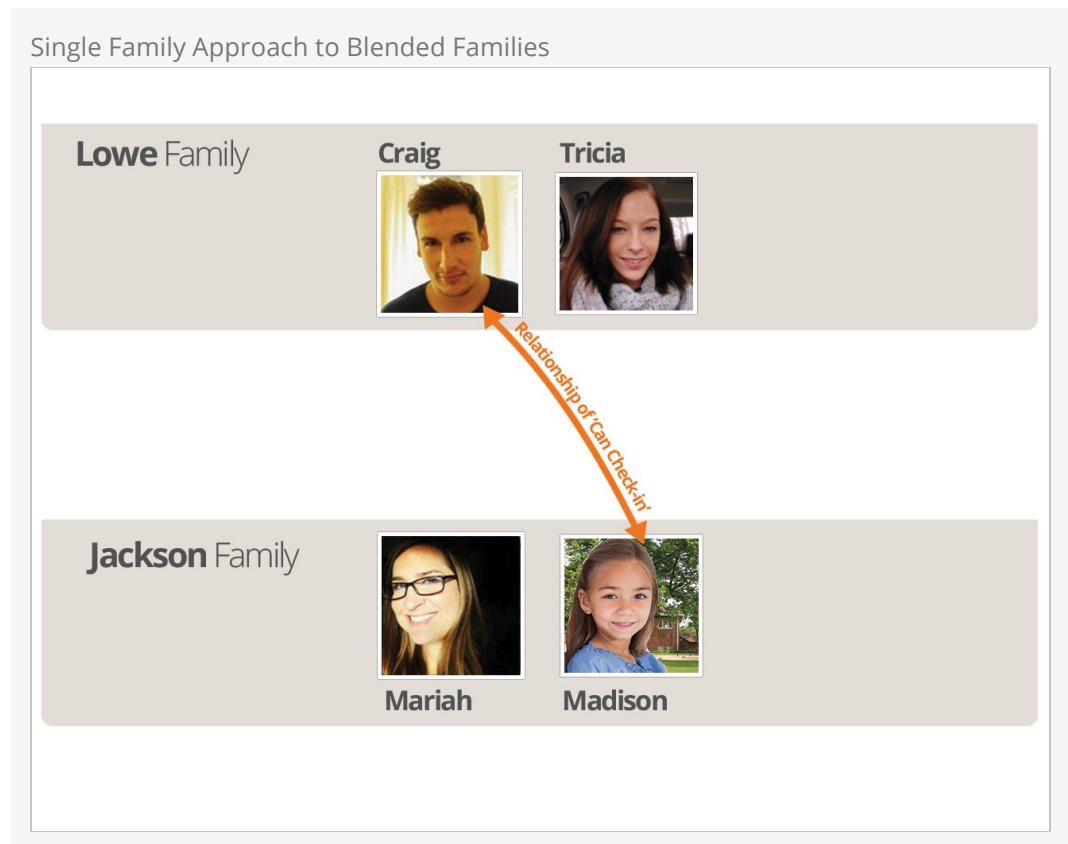
This approach may be preferable in cases where one parent has sole custody or if the other family does not participate in your ministry. In this approach, reporting and most other features act just like a typical family. Check-in can be allowed by other individuals using the relationship of *Can Check-in*.

> **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.