# CHECKING-OUT
# CHECK-IN


ROCK

# Welcome

Attendance data is the backbone of any organization's information strategy. Not only can it provide safety and security to the children who attend your events, it also provides a window into each person's ongoing relationship with your organization.

As you read through this guide and start to think about configuring check-in for your organization, you'll realize the system has a ton of flexibility. Keep in mind that the downside of flexibility is complexity. To keep it simple, consider using the out-of-the-box configuration as much as possible, renaming locations, groups and service times as needed. As you get more comfortable with Rock, you can dive deeper into some of the more complex configurations.

# Check-In Systems

Before we get into the details of Rock's check-in system, let's start with a broad overview of what check-in is and how it works.

In general terms, check-in involves a person attending a group at a location at a specific time. Each of these elements ties to a component in Rock. A person. A group or area. A location. A time (schedule). The check-in system consists of a series of screens that allow a guest to identify each of these elements and capture them in an electronic record. In many check-in systems, the process ends with some kind of identification label being printed.

## Types of Digital Check-In Systems

Digital check-in systems have been in use for over a decade. Over the years these systems have developed into three basic categories:

- Centralized self-service check-in
- Decentralized check-in
- Centralized attended check-in

There are pros and cons to each system. Let's take a look at each.

# Centralized Self-Service Check-In

With the centralized self-service model, attendees check themselves in at a main kiosk that serves multiple areas and rooms.

**Pros:**

- Once people are familiar with the system, they become comfortable and efficient with the check-in process
- Does not require as many volunteers
- Families with multiple kids can check-in all of their kids at the same time

**Cons:**

- Can be somewhat intimidating for first-time guests

# Decentralized Check-In

Decentralized check-in places a kiosk in every room where check-in is required.

**Pros:**

- Attendees get to observe the room (considering the teacher and students in the

room) before checking in
- Can be fast since you don't need to select the location and there are smaller lines due to the greater number of kiosks

**Cons:**

- Higher equipment costs due to the number of kiosks and printers needed
- Families with multiple kids of different ages need to go through the check-in process more than once
- Increased support costs due to the number of kiosks required

## Centralized Attended Check-In

In this model, attendees walk up to a kiosk that is staffed by a volunteer who performs the check-in process for the guest.

**Pros:**

- Good experience for first-time guests

**Cons:**

- After the first check-in many people may prefer to do the process themselves
- Must have a volunteer for each kiosk
- Can be slower since there is an added communication layer

> ### Registration Mode
>
> Rock has Registration Mode for churches that desire to register or edit new families as they arrive.

# Check-In Processes Available in Rock

Rock provides two different types of basic check-in processes: Family and Individual.

Family check-in allows a family to check in multiple family members at once. A family can walk up to a central kiosk and check in everyone at the same time with a minimum number of steps. Adults may be checked into volunteer (or other) groups while also checking in their children.

As you might guess, Individual check-in checks in one person at a time. The process leads one person through the selection of groups, locations, and times, then repeats for each additional family member.

The check-in process is similar for both systems. Rock defaults to the Family check-in configuration, but you can easily change this when configuring your check-in process. More on that in a bit.

While Individual check-in is typically used for decentralized scenarios and Family is typically used for centralized, there is no requirement that you stick to this pattern. You could choose to use the family check-in configuration with a decentralized system, letting families check-in all of their children at the first location, then taking the kids to individual rooms without needing to check them in again. The system is designed to be flexible.

# Learning the Lingo

Let's talk about vocabulary. Feel free to revisit this section as you go through the manual to clarify the meanings of these terms.

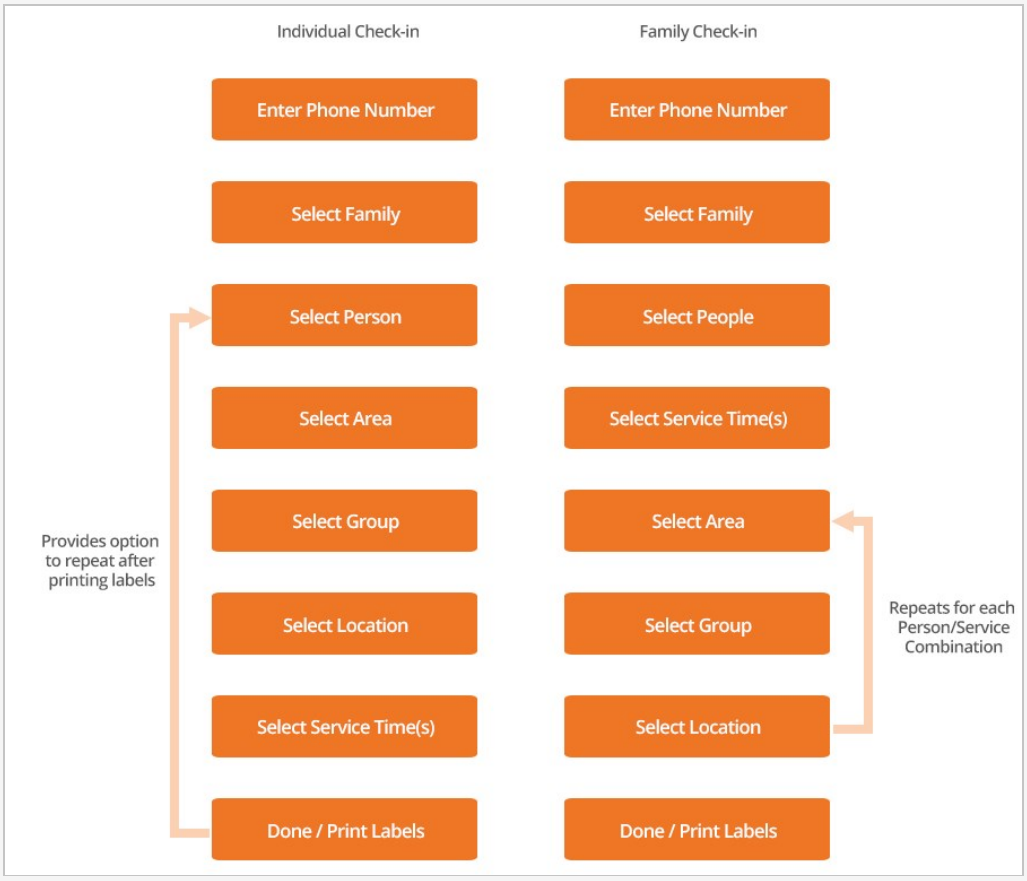
| Term | Definition |
| --- | --- |
| Check-in Configurations | A check-in configuration is what you start with when configuring check-in. All the settings are associated with a particular configuration. When you start a check-in kiosk, one of the first things you'll be asked is which check-in configuration to use. Examples of check-in configurations include Volunteer Check-In and Weekly Service Check-In (for kids).<br><br>These are also sometime referred to as *Check-in Types* or *Check-in Configuration Templates*. |
| Areas | This is a high-level collection of related check-in groups. Typically, these will match your organizational structure. Within an area, you'll probably have several groups that individuals can check into. Areas allow you to organize your groups into collections of similar groups. Example areas in the default configuration include: Nursery/Preschool, Elementary, Jr High and High School. For those who like to know how things work under the hood, areas are simply Rock group types. For everyone else, it's ok... just keep the hood closed. |
| Sub-Areas | If needed you can create sub-areas, which act as a hierarchy of areas. Even though Rock allows it, we strongly encourage you to keep your structure simple. (Some of the largest organizations using Rock do so without the need for sub-areas.) |
| Group | This is the classification unit that a person checks into. A newborn would be checked into the *Infants* group while a second-grader would be checked into the *Grades 2-3* group. Note that these are just examples. You can easily customize your groups.<br><br>Deeper Knowledge: while classification units are called groups, and they are actual Rock groups under the hood, individuals are not added as group members when they check in, since their relationship with the group is not permanent. |
| Locations | If a group is *what* someone checks into, the location is *where*. In most cases this will be a room. Specifying locations makes sense for larger organizations that might have multiple rooms for each group. |

| Term | Definition |
| --- | --- |
| Service Schedule | Groups tell us *what*, locations tell us *where*, and the schedule tells us *when*. Starting to understand the structure? Again, this makes sense if you consider that most churches have multiple services. |
| Labels | In most check-in scenarios, you'll want to print out some form of label or tag. These might be used for a nametag or a check-in/check-out token. Rock allows you to print as many (or few) labels as you want. It's also easy to customize these labels to your liking. |
| Kiosk | A kiosk is the device that is used to process the check-in. |
| Printer | The printer is what prints the labels. Rock allows you to configure where and how these labels get printed. More on that later... |

# Individual and Family Check-In in Rock

Before we get into the more technical aspects of configuration, let's step back and take a general look at how individual and family check-in works in Rock.

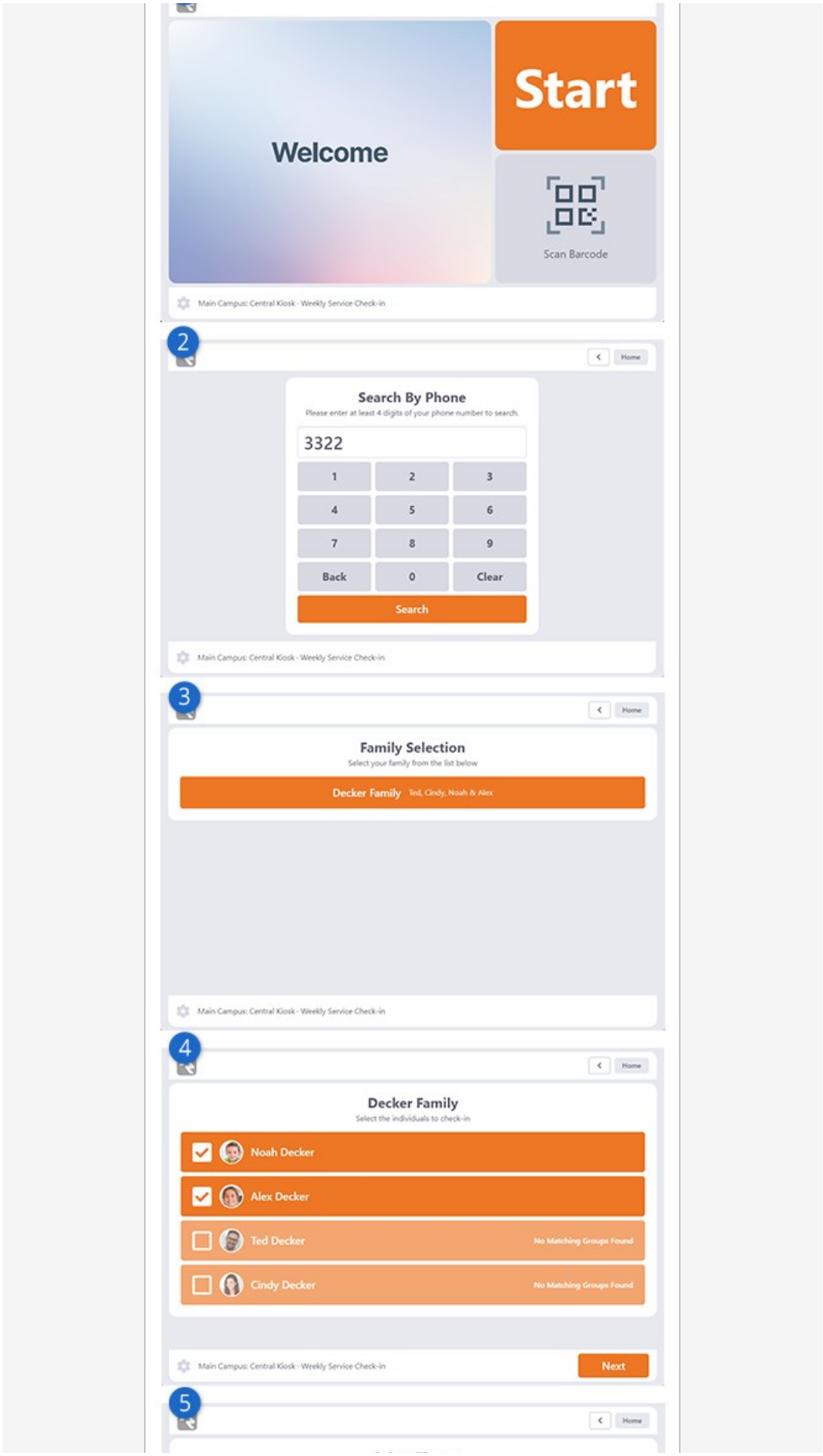
Check-In Overview

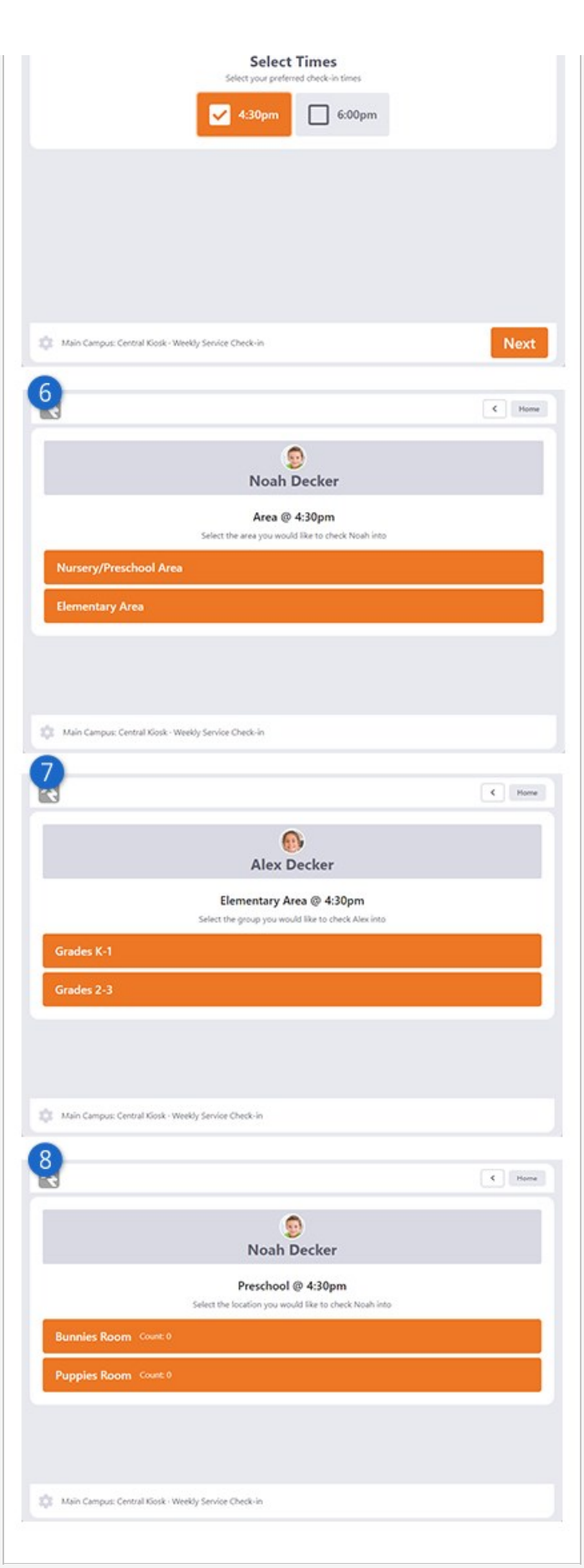



The specific screens the guest will be guided through are based on whether they're checking in an individual or a family, as well as the check-in system settings set up by the administrator. But as you can see, the process is similar for both.

Now let's take a more specific look at the family check-in process. Here, Ted and Cindy Decker are checking in their children, Noah and Alex.

Family Check-In Walkthrough


Welcome
Start
Scan Barcode
Main Campus: Central Kiosk - Weekly Service Check-in
2
Home
Search By Phone
Please enter at least 4 digits of your phone number to search.
3322
1
2
3
4
5
6
7
8
9
Back
0
Clear
Search
Main Campus: Central Kiosk - Weekly Service Check-in
3
Home
Family Selection
Select your family from the list below
Decker Family
Ted, Cindy, Noah & Alex
Main Campus: Central Kiosk - Weekly Service Check-in
4
Home
Decker Family
Select the individuals to check-in
Noah Decker
Alex Decker
Ted Decker
No Matching Groups Found
Cindy Decker
No Matching Groups Found
Main Campus: Central Kiosk - Weekly Service Check-in
Next
5
Home


Select Times
Select your preferred check-in times
4:30pm
6:00pm
Main Campus: Central Kiosk - Weekly Service Check-in
Next
6
Home
Noah Decker
Area @ 4:30pm
Select the area you would like to check Noah into
Nursery/Preschool Area
Elementary Area
Main Campus: Central Kiosk - Weekly Service Check-in
7
Home
Alex Decker
Elementary Area @ 4:30pm
Select the group you would like to check Alex into
Grades K-1
Grades 2-3
Main Campus: Central Kiosk - Weekly Service Check-in
8
Home
Noah Decker
Preschool @ 4:30pm
Select the location you would like to check Noah into
Bunnies Room Count: 0
Puppies Room Count: 0
Main Campus: Central Kiosk - Weekly Service Check-in

1. **Welcome**
   The Welcome screen is the waiting screen your guests will see when they walk up to the kiosk to check in. If no check-in locations are currently active, the guest will see a countdown for the opening time.
2. **Search**
   The Search By Phone screen allows guests to enter their phone number to begin the check-in process. By default, only four digits are needed to perform the search, but like most check-in features, this is configurable. Since entering the last four digits reduces check-in time, you may want to share this tip with your guests.
3. **Results from search**
   The Families screen lists the families that match the phone number entered.
4. **List of Check-in people**
   Rock displays a list of family members and others with a 'Can Check-in' relationship to the family (more on that when we get to the Administration screen). From here the guest can select all of the family members who are checking in.
5. **Select Times**
   The Select Time screen allows the guest to pick the times they are checking into, either a single time or more than one. If only one time is available, this screen will be skipped.
6. **Area Selection**
   The Area Selection screen lists the check-in areas that are available for the current time and individual. This screen will only display if the child's age spans groups in multiple areas.
7. **Group Selection**
   The Group Selection screen lists the check-in groups that are valid for the current time and individual. If only one group is valid, this screen will be skipped.
8. **Room Location**
   The Location Selection screen will list all open locations for the group selected on the previous screen. If only one location is available, this screen will be skipped.

There is also an optional Ability Level screen that is displayed if any areas or groups selected have an ability level requirement (e.g., crawling, walking, potty-trained, etc.). This screen is used to filter the available areas and/or groups. You can learn more about it in the Ability Levels chapter below.

> **Previous Check-Ins**
>
> By default, when accessing the Family Selection screen, family members who have previously checked in within the last 10 days will already be selected. If 10 days is too short (or too long) a timespan, you can change this value in the Check-in Configuration area. See the Setting It all Up chapter below for more information.

The process described above is practically the same for an individual, but the process is only done once rather than cycled through multiple family members.

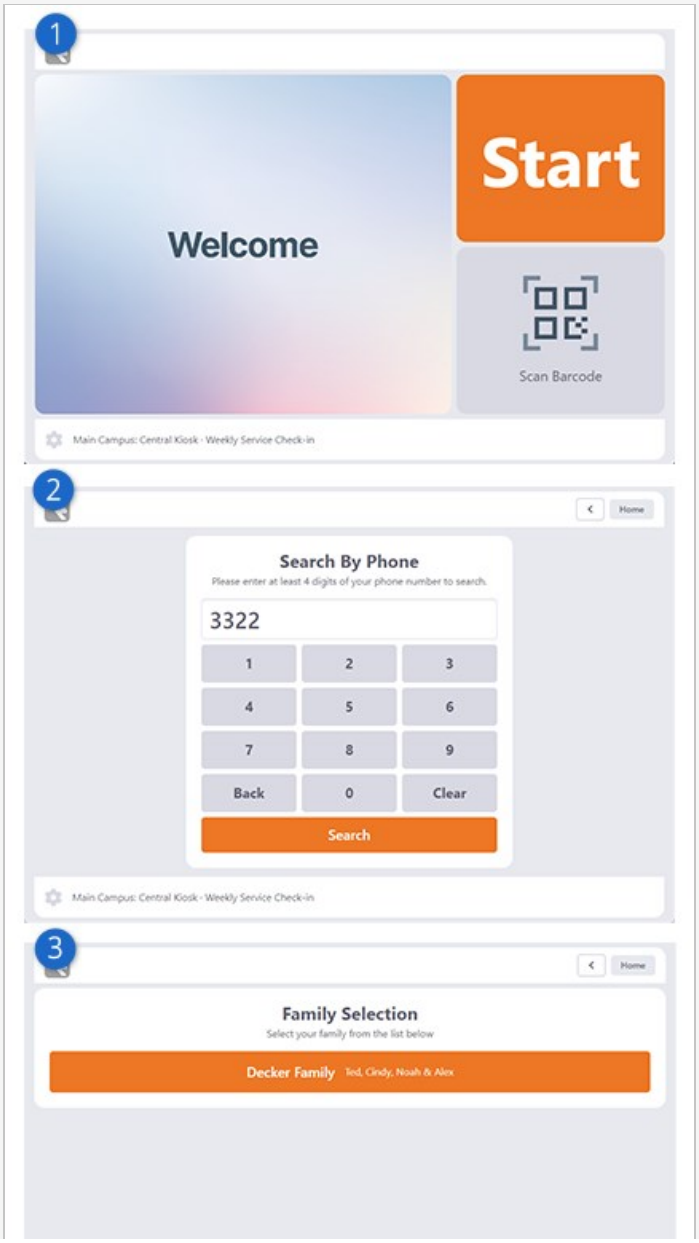
As you can see, many of the screens will be skipped over if there is only one selection. This means if a family only has one teen, for example, they will only have to enter the phone number and select their family. The rest of the screens will be skipped, and their label(s) will print. This makes check-in very quick and simple.

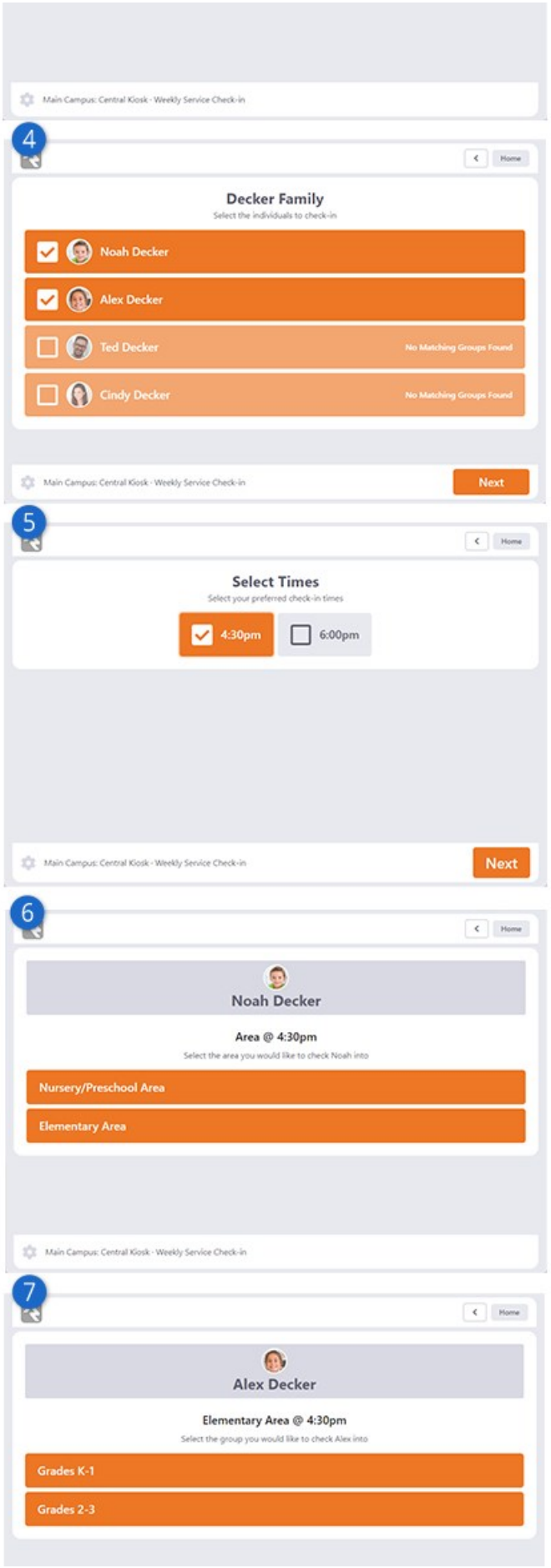
# The Administration Screen

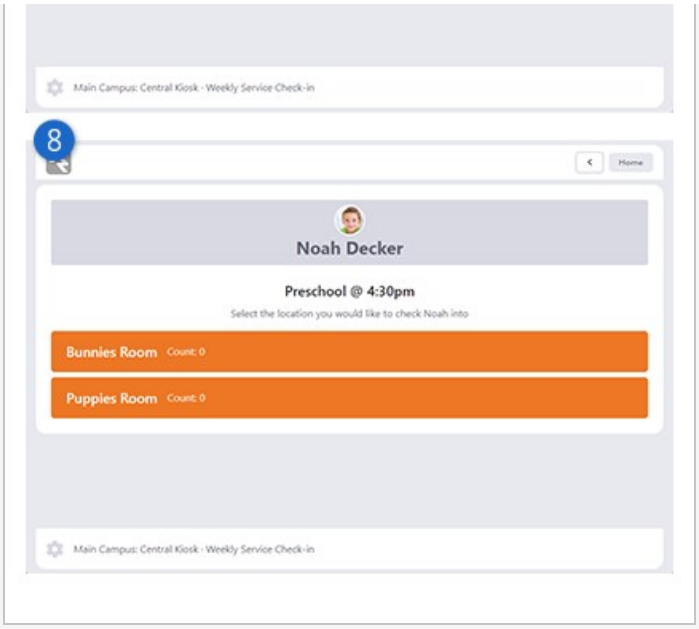
OK, ready to get a little more technical? Let’s take a look at the Administration Screen.

The Administration screen is where you choose your check-in options for the kiosk device you're starting.

Check-in Administration Screen




Main Campus: Central Kiosk - Weekly Service Check-in
4
Home
Decker Family
Select the individuals to check-in
Noah Decker
Alex Decker
Ted Decker
No Matching Groups Found
Cindy Decker
No Matching Groups Found
Main Campus: Central Kiosk - Weekly Service Check-in
Next
5
Home
Select Times
Select your preferred check-in times
4:30pm
6:00pm
Main Campus: Central Kiosk - Weekly Service Check-in
Next
6
Home
Noah Decker
Area @ 4:30pm
Select the area you would like to check Noah into
Nursery/Preschool Area
Elementary Area
Main Campus: Central Kiosk - Weekly Service Check-in
7
Home
Alex Decker
Elementary Area @ 4:30pm
Select the group you would like to check Alex into
Grades K-1
Grades 2-3



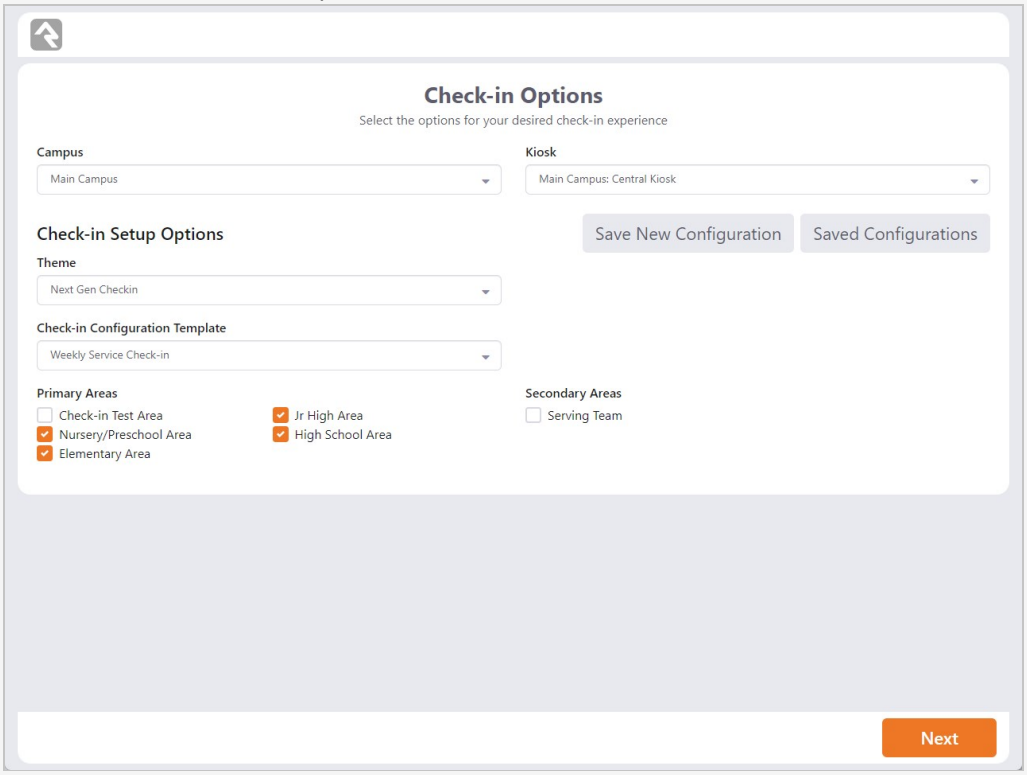

### Custom Configuration

Initially you won't see any *Saved Configurations* but you can use the `Custom Configurations` button to create the ones you want to choose in the future.

The Administration screen is the first screen you come to when you launch the check-in system. From this screen you can configure the check-in session by selecting a saved configuration which represents:

- Check-in Theme
- Kiosk Device
- Check-in Configuration Template
- Areas

Check-in Administration Options




The *Theme* field is where you select which look and feel you want to use for the check-in screens at that kiosk.

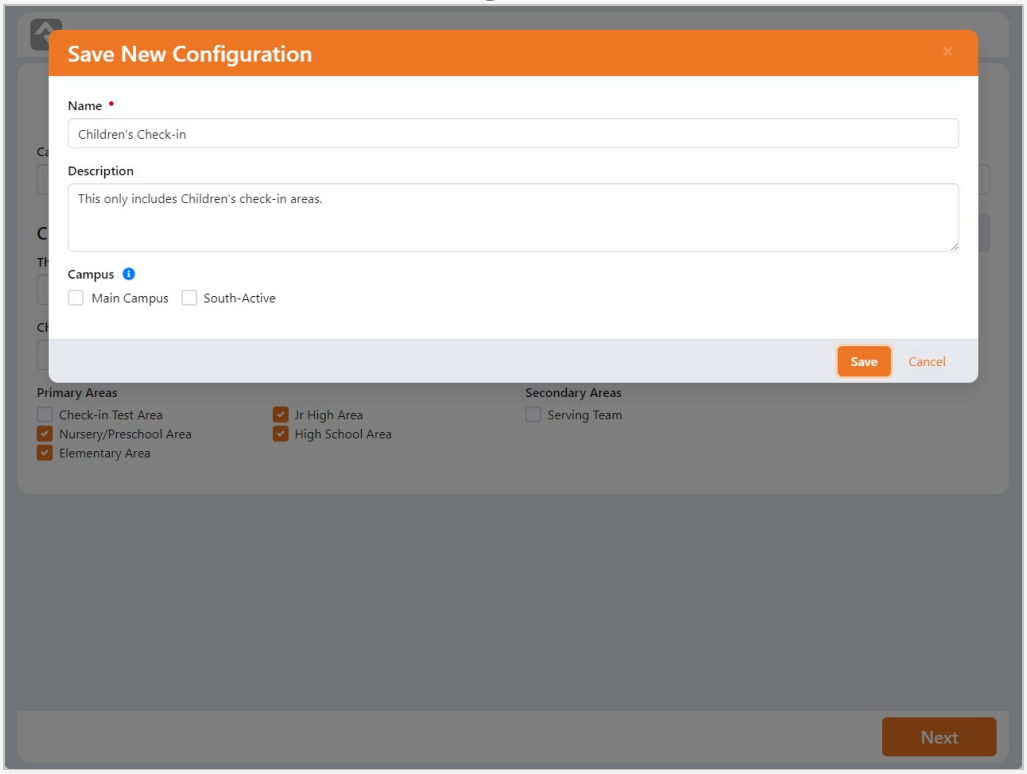
The *Kiosk* field is where you choose which kiosk device to set this kiosk to. Among other things, this sets the location for the kiosk, determining which location-matching groups can check in here.

The *Check-in Configuration Template* field allows you to select which check-in configuration you want to use for the kiosk.

The *Primary Areas* and *Secondary Areas* checkboxes are where you identify which check-in areas you want to enable for the kiosk. Rock's check-in system will allow checking into any area from any number of configurations at the same time, but it can only use one configuration template's settings at a time. Primary Areas are all of the areas in the selected configuration that are allowed to check in based on their location matching the location setting of the kiosk device. Secondary Areas are any other areas also configured to use the selected kiosk device but from different check-in configuration templates.

The selections you make on this screen will be remembered for future sessions. You can also name and save different configurations for quicker future kiosk setup.

Check-in Administration Save New Configuration




> **Tip**
>
> You can bypass this screen by entering URL Parameters.

Let's ramp this up another notch and look at the types of customization you can do with Rock's check-in system. Then we'll dive into planning and configuring the check-in system for *your* organization.

# Types of Customization

We've mentioned several times that Rock lets you customize the check-in process in powerful ways. Here are some details on the different ways you can customize the system and the level of effort needed for each.

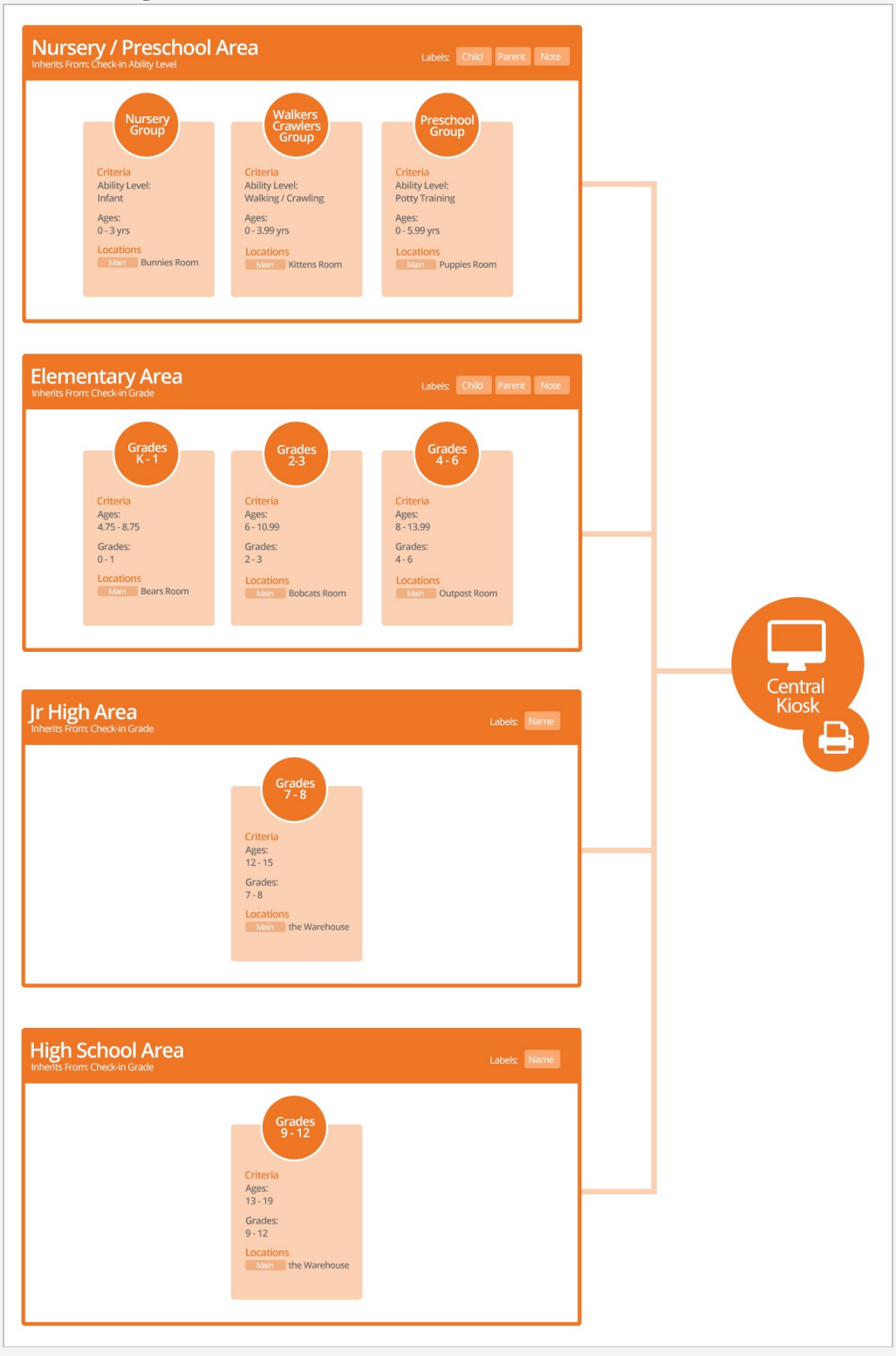
| Type | Level of Effort | Description |
|---|---|---|
| Area, Group and Schedule Structure | Easy | In all likelihood no two organizations will have the same areas, groups and schedules for their check-in. Rock's check-in configuration tools make these changes a simple process. |
| Labels | Easy/Moderate | Depending on the type of customization required, labels can be easy or a bit tricky. Most of this depends on the level of graphics required for your labels. Read below for a deeper discussion about how to modify the labels. |
| Look and Feel | Moderate | While Rock Next-Gen Check-in ships with one check-in theme, you can add your own with some basic knowledge of HTML/CSS and Less. |

# Sample Configurations

Before we get much further, let's stop and take a look at two different check-in configurations. The first is for our fictitious *Rock Solid Church*. It's also the default check-in configuration that ships with Rock. The second is a sample configuration for a larger church, *Boulder Solid Church*, which has two campuses. This second option will give you some ideas about how things can be modified to meet an organization's needs.

## Rock Solid Church Configuration

Default Configuration



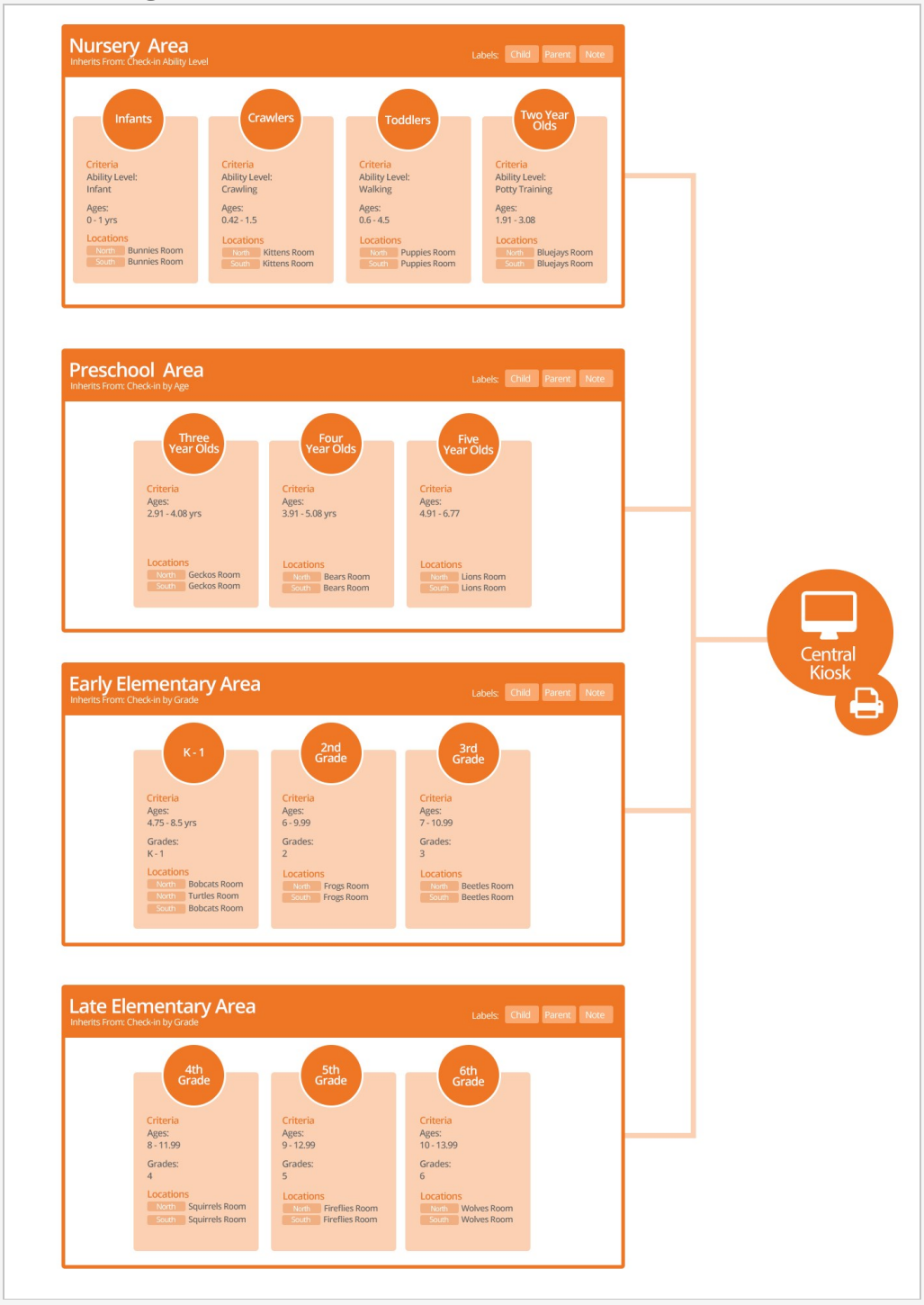

## Points of Interest

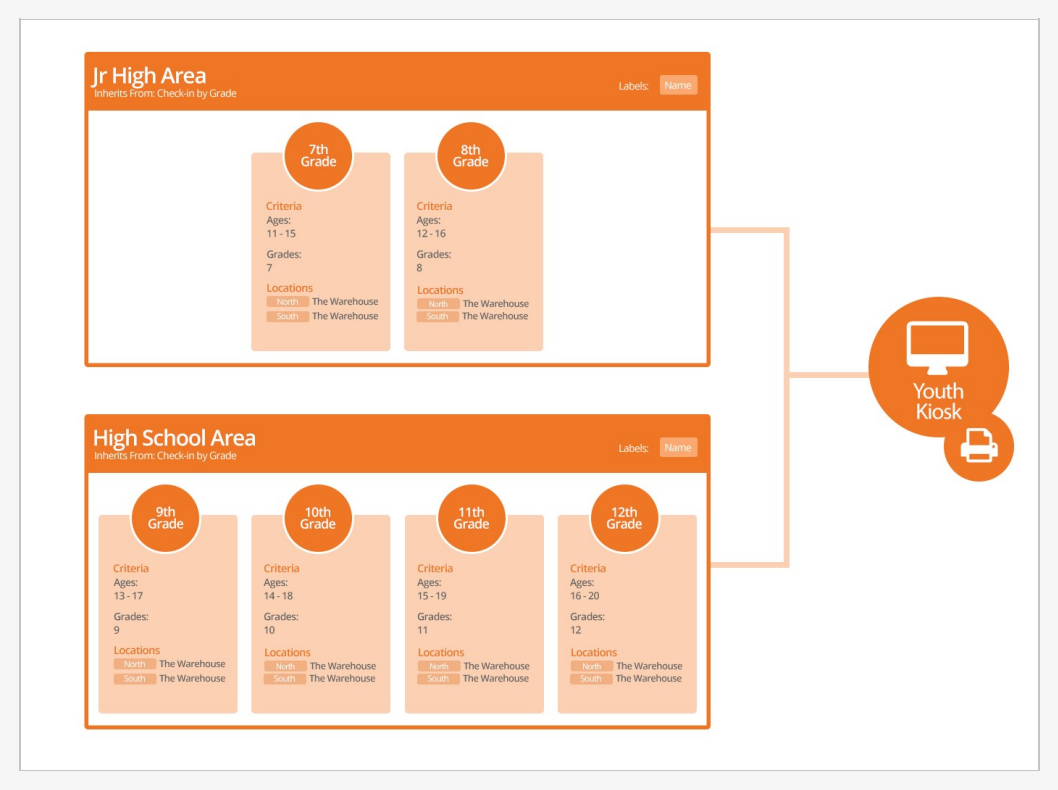
1. Note how Jr High and High School have their own areas with only a single check-in group in each one. This is a preference. You could combine them into a single *Youth Area* and put both groups in it. In this case *Rock Solid Church* has broken them out for reporting reasons.

2. Pay close attention to the age ranges in the groups. Notice how they are fairly wide. Wider ranges tend to work better because they give you some leeway in unique family edge cases. Also note that the age ranges overlap. It's important that there are no gaps in the age ranges.
3. This church has decided to use a centralized kiosk for check-in. They have also defined a printer device for this kiosk.
4. For simplicity's sake, we are not showing the mapping of the check-in schedule (service times) to the various locations (rooms). Keep in mind that each location can determine which service times it's available for.

## Boulder Solid Church Configuration

## Default Configuration






### Points of Interest

1. Notice that Boulder Solid Church has two campuses, *North* and *South*. These two campuses can share the same check-in group, with each location (campus > room) being attached to the group. This is true even if the two campuses have different service times.
2. Note how the *North* campus has two rooms (Bobcats & Turtles) for their K-1 group. By using schedules, they can configure check-in to use the Turtle room for only their most popular services.
3. This church has configured a second kiosk in Rock that is dedicated to their youth ministry.
4. You might be questioning the strategy of a church this size only using two check-in kiosks for the whole church. You'll learn later that a kiosk, as defined in Rock, is a device configuration template that can be used by multiple physical machines.
5. You've probably noticed that this configuration has more areas and groups. In some cases, like the kids' area, this configuration is the best fit for the structure of the buildings. In the teen area, it's more for reporting reasons since the youth are all in the same large room.

# Planning Your Configuration

Before jumping into the configuration of the check-in system, it's important to take a step back and do some planning. No matter how well you know your organization's structure in your head, it's critical that you put it all down on paper. This will help you get the configuration done right the first time and reduce the chance for error. Be sure to consider the following:

- What groups will you be checking into?
- Are they broken down by age, ability, gender or grade?
- How are these groups organized into areas?
- What rooms/locations are used for each group?
- Do these locations vary by:
  - Day of the week (e.g., Saturday vs. Sunday)
  - Service times
- Will you have special events (think Christmas, Easter, etc.) that will impact your normal configuration? If so, briefly write out how these will differ.
- If you have multiple campuses, how does this change by campus?

> ### Consistent Configuration
>
> We strongly encourage multi-site organizations to select just one area/group configuration as a standard. This will greatly simplify the attendance reporting and configuration. Of course, locations and schedules will need to be specific to the campus but do try to keep the groups and areas consistent.

We've provided a Check-in Configuration Worksheet to help you plan your configuration. Use your answers above to complete the worksheet.

# Setting It All Up

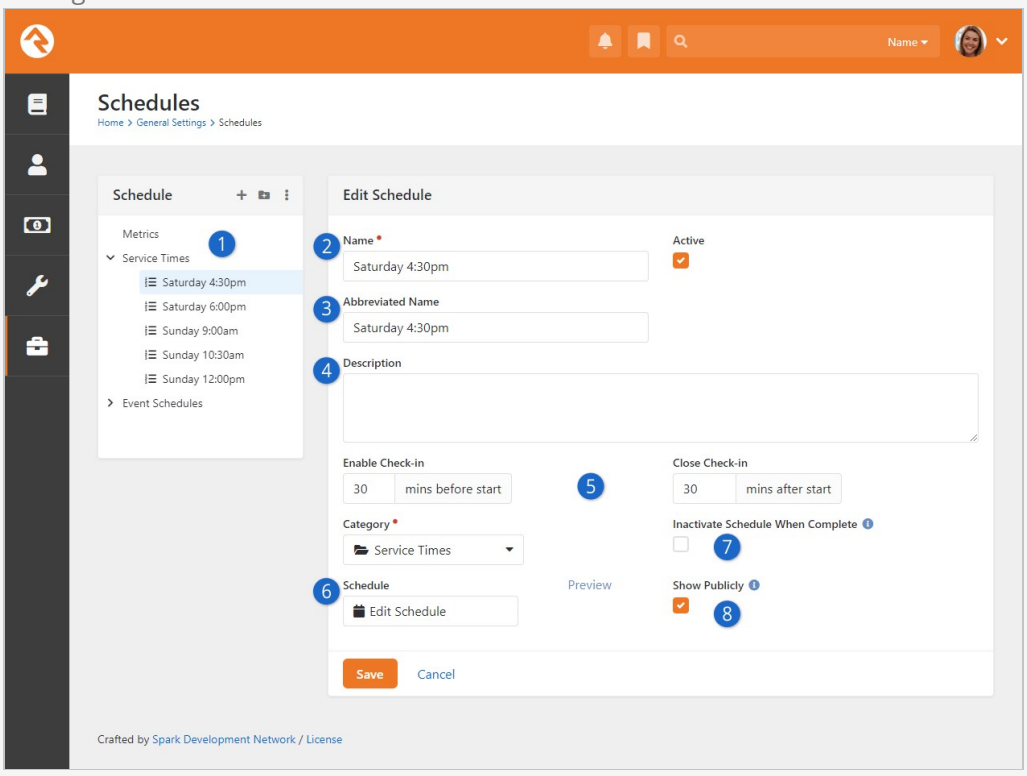
With your configuration all documented (you did document it, right?), let's jump in and start configuring check-in for your organization.

> **Simple Sample**
>
> Keep in mind that sample configurations are already present at installation. Feel free to modify these settings, adding new items as needed.

## Service Times

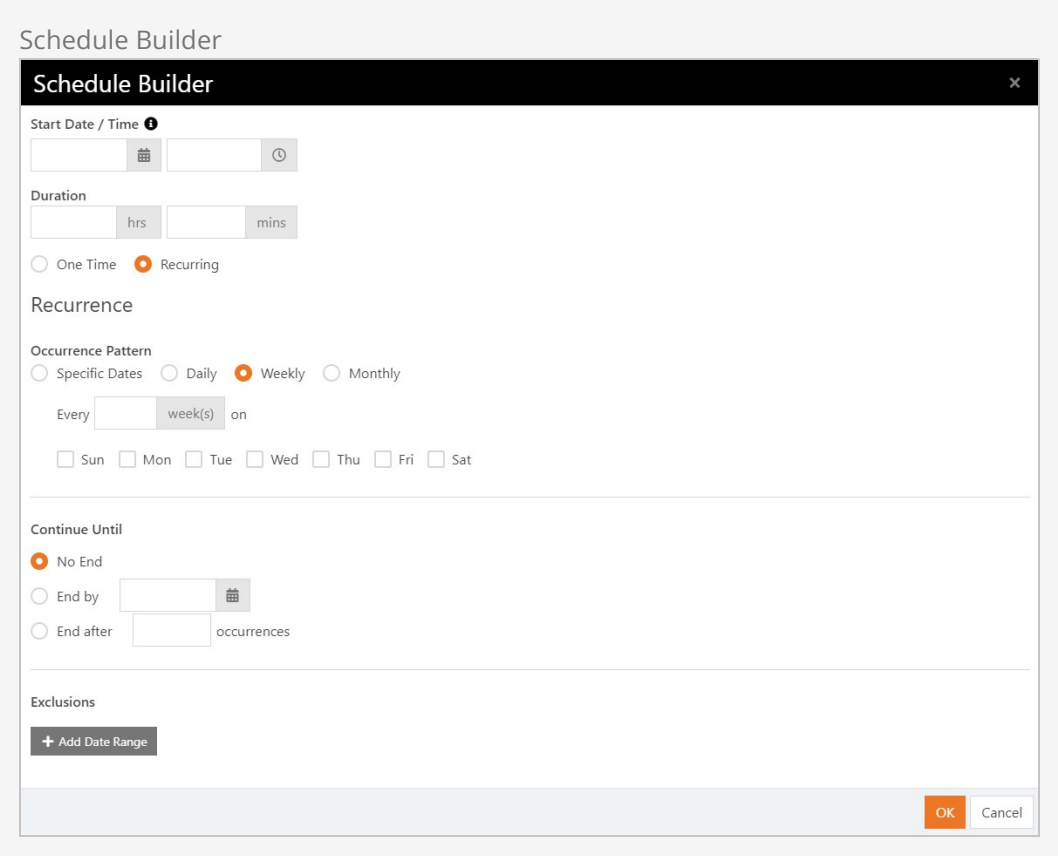
Let's start with something simple by configuring our service times (schedules) under `Admin Tools > Check-in > Schedules`. You'll use the values on this list later in the check-in configuration. They are used to help determine which services are active (allow check-in) at any given time.

Editing A Schedule



1. **Schedule Menu Tree**
   Shows a hierarchical list of schedules defined in Rock. Notice that there are separate categories for Service Times and Event Schedules.
2. **Name**
   The name to use for the schedule item.
3. **Abbreviated Name**
   If present, the *Abbreviated Name* will appear in Group Scheduling areas.
4. **Description**
   A brief description of what the schedule refers to and how it will be used.
5. **Enable/Close Check-in**
   The times check-in will start (before the scheduled time) and end (after the scheduled time). If your *Close Check-in* time extends beyond the length of your service (based on the service's scheduled Duration), check-in will close when the service ends. In other words, if your service is one hour long then check-in will close after one hour even if your *Close Check-in* is set to more than 60 minutes.
6. **Edit Schedule**
   Click to edit the start date and time, event duration, and recurrence pattern.
7. **Inactivate Schedule When Complete**
   You'll probably leave this unchecked for your service times, but you might use it for event schedules. Checking this box will automatically set the schedule to Inactive if the schedule has no more occurrences.
8. **Show Publicly**
   Setting this allows you to filter out schedules that are not public-facing.

1. Configure your weekend service schedules at `Admin Tools > Check-in > Schedules`.
2. Modify, and if needed, add additional services times to the Service Times category. If you have multiple campuses with different service times, add each unique start time to this list. If two campuses share the same start time, you should only add it once. Our suggestion is to put *all* campus weekend service times in this one category, Service Times.
3. Be sure to set the correct check-in start and end times. The built-in example values start check-in 30 minutes before each service begins and end 30 minutes *after the start*. Adjust these values to fit the needs of your organization.
4. Schedules that overlap will present the person checking in with a choice during that overlap period.
5. Click `Edit Schedule` to set the day, time and recurrence settings as pictured below.




## Cloning Schedules

At many churches, adding a new schedule for dedicated events often involves duplicating the setup of regular worship services. Staff must manually check each location to ensure it is included in the new schedule. While this is manageable for smaller churches, larger ones with hundreds of locations face an elevated risk of errors, making the process cumbersome and stressful. New to version 17 of Rock, you can now clone schedules.

# How to Clone a Schedule:

1. Go into `Admin Tools > Settings > Check-In > Check-In Configuration > Weekly Service Check-In > Schedule`.
2. Click the Clone Scheduled Button on the upper right-hand corner.
3. From here a pop up with Copy Schedule will appear. Make sure to add a Source Schedule (the original schedule) and a Destination Schedule (the cloned schedule)
4. This will copy all the enabled locations from the source scheduled into the destination schedule.

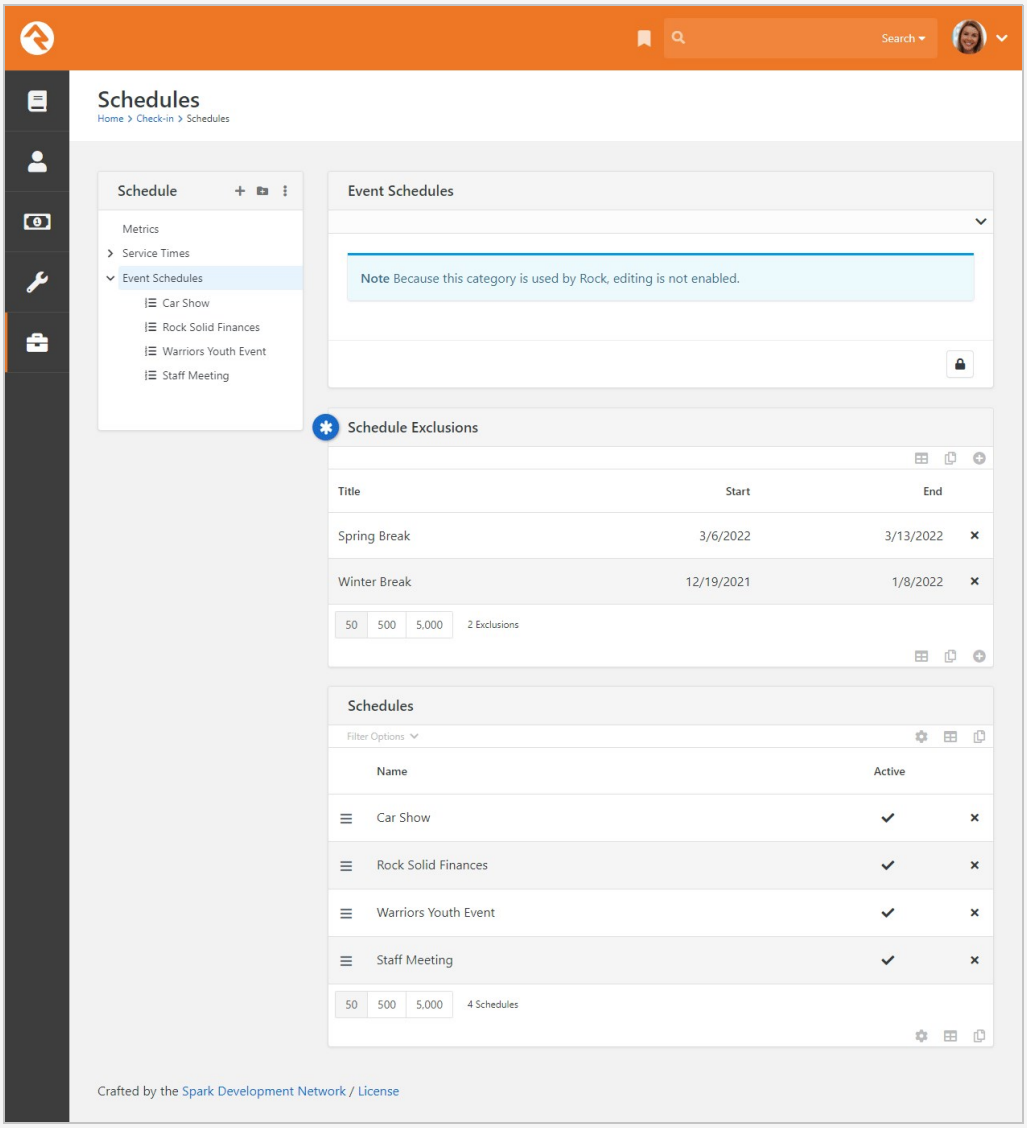
> **Watch for Matching GroupId**
>
> Deleting GroupLocationSchedule records based only on the ScheduleId can cause issues because a single Schedule can be used with different check-in configurations. To delete records safely, you need to ensure that the GroupId in the record matches a group that is part of the current check-in configuration.

## Taking Exception

Of course, there will be times when your regularly-scheduled programming is interrupted by special events or holidays. For example, let's say there are no Saturday services on Easter weekend. You can tell Rock to ignore your regular schedule for that date. This is called an exclusion, and there are two ways to set it up. Let's check them out.

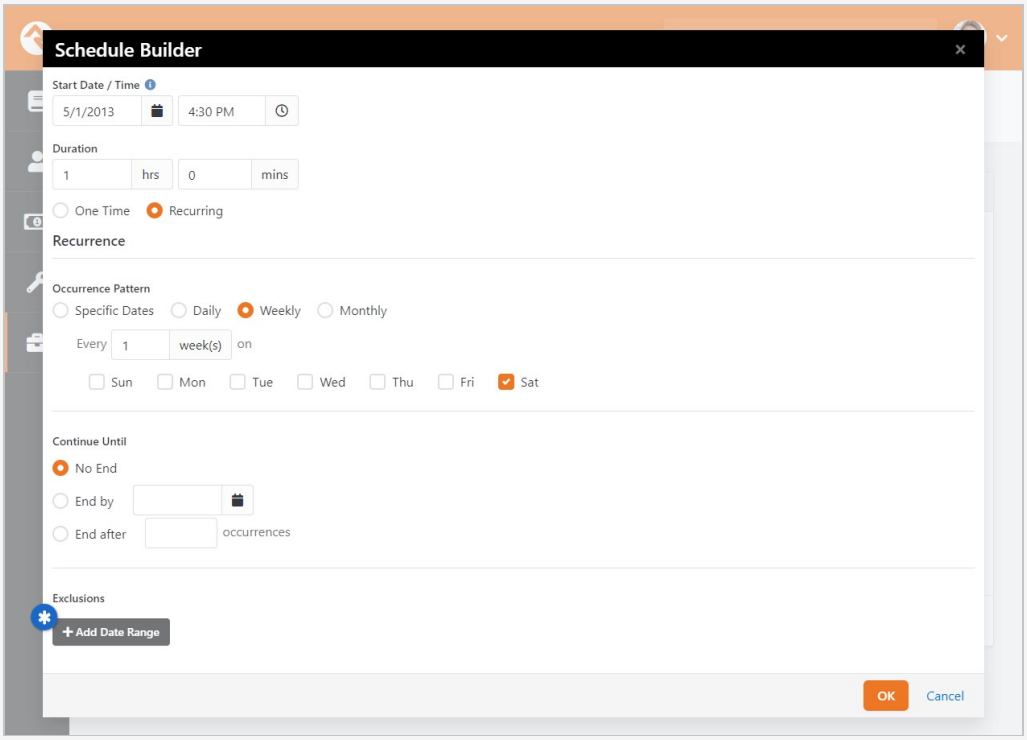
The first way to set up an exclusion is at the schedule parent category level in the main *Schedules* page, found at `Admin Tools > Check-In > Schedules`. This is an easy way to inactivate all schedules in a category for specific date ranges. In the tree navigation, select the parent category for which you want to create an exclusion, such as "Event Schedule" as shown in the screenshot below. Click the `+` to name the exclusion and set the date parameters.

Scheduled Exclusions




The second way to set up an exclusion is at the schedule event (or child) level. From the Schedules page, drill down in the tree navigation to the specific event you want to create an exclusion for. Click the `Edit` button to display the schedule details for the event, then click `Edit Schedule`. In the Exclusions section of the Schedule Builder page, click `Add Date Range` to specify the exclusion parameters as pictured below.

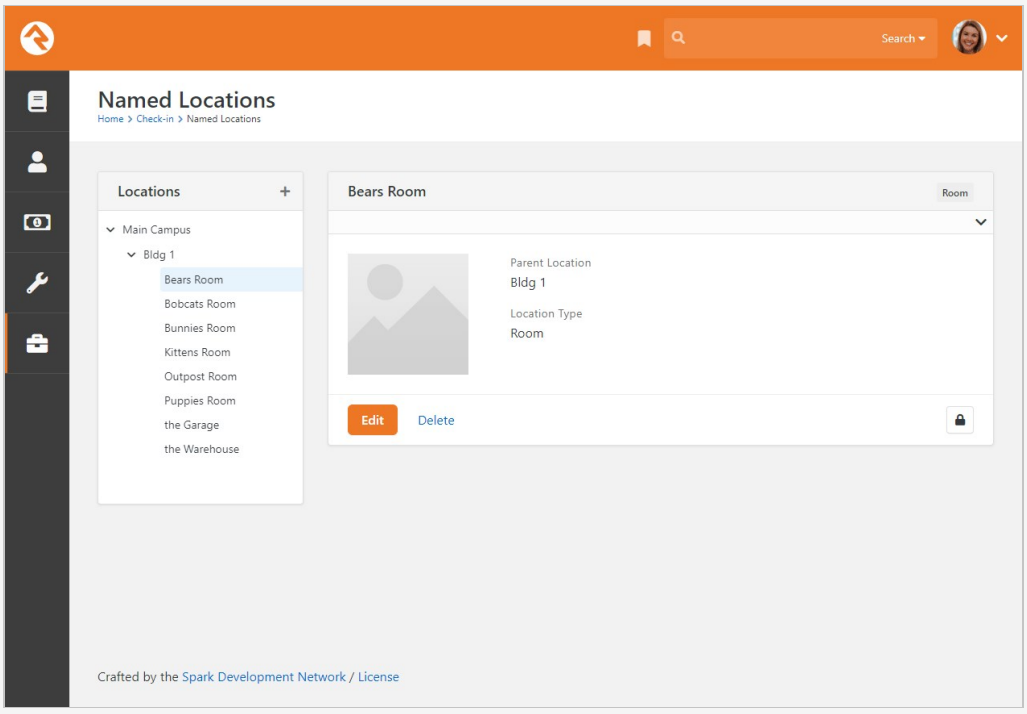
Schedule Builder




## Locations

Next, let's configure the locations where our children meet.

Location Details




1. Navigate to `Admin Tools > Check-in > Named Locations`.

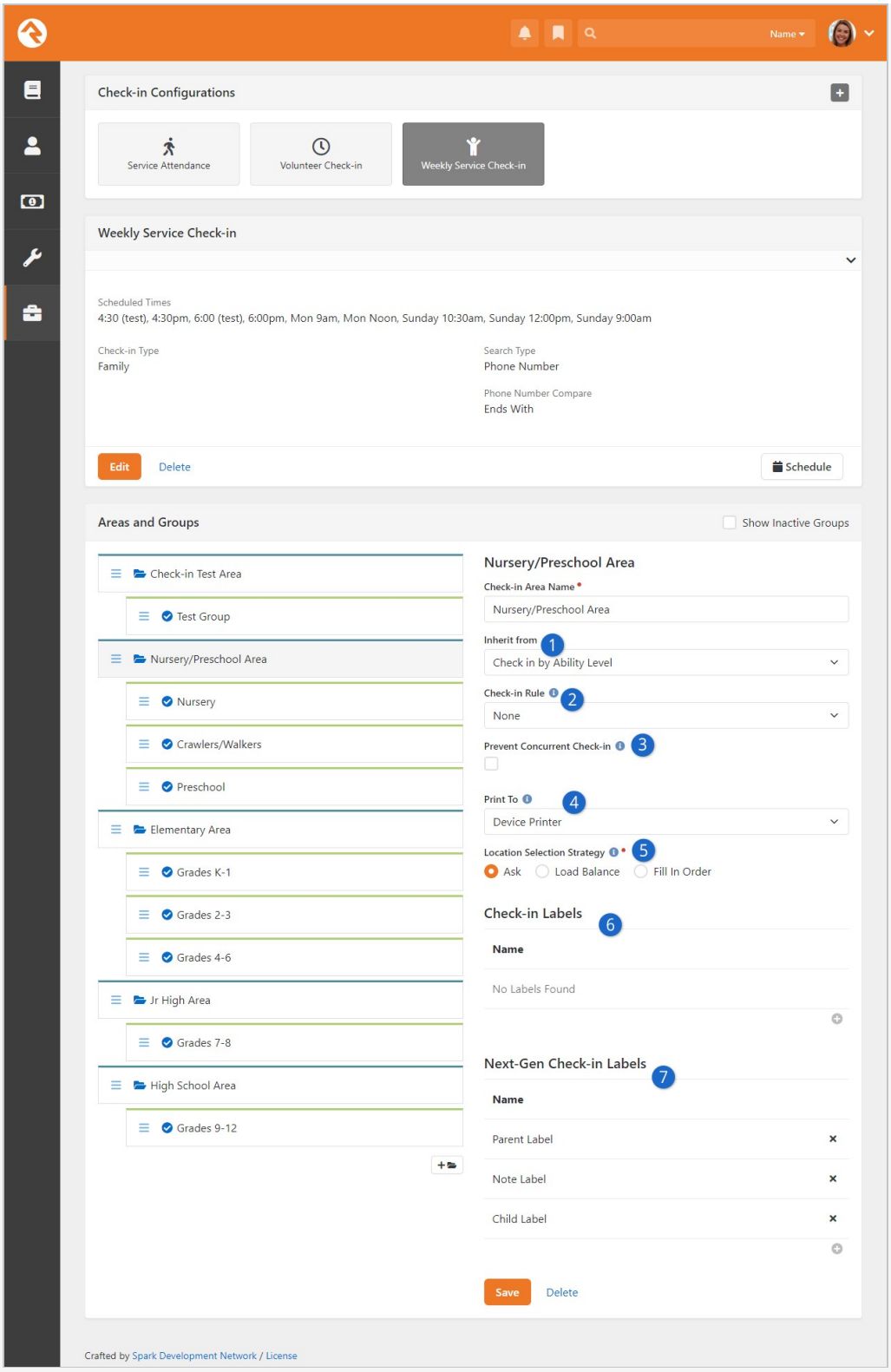
2. Start by renaming the top-level campus.
3. Next enter each building on your campus.
4. Finally, add locations (or modify the existing ones) for each room that will need to be set up for check-in.

## Areas and Groups

Rock comes with several pre-configured check-in types. Most organizations should be able to simply tweak what is already there using the following steps.

Start by navigating to the check-in configuration screen at `Admin Tools > Check-in > Check-in Configuration` and then select *Weekly Service Check-in*. You'll see the sample configuration for check-in. Note that area headings are blue, with their associated groups indented below in green. If your structure is vastly different, you may want to check with other Rock organizations to ensure that you're on the right track.

Check-in Configuration (Area)




### 1 Inherit From

This setting determines what options you have available in your check-in group configuration as described below. For instance, if you want to check in children by their grade then you would want to select *Check in by Grade*. For more details on how Rock handles grades and promotion from one grade to the next, see our `Person and Family Field Guide`.

2 **Check-in Rule**
This setting relates to the check-in groups within this area.

- **None:** The person won't be added to a group and doesn't need to belong to a group in order to check in.
- **Add On Check In:** The person will be added to the check-in group when they check in.
- **Already Enrolled In Group:** When this is selected, the *Matching Logic* field appears with the below options. Keep in mind that you can allow check-in for only certain group member roles (see the `Rock Your Groups` manual for details on the *Can Check In to Group* setting).
  - **Must Be Enrolled**: The person must already be in the group to check in.
  - **Prefer Enrolled Groups**: If the person is enrolled in a matching group, other groups are ignored/removed as options.

  You can read more about this feature in the Advanced Options chapter.

3 **Prevent Concurrent Check-in**
By default, when you enable the *Prevent Duplicate Check-in* option for a check-in configuration template, it affects *all* groups under that template. If you find yourself in a situation where you really only wanted one specific area to be affected, don't check that option and instead check this one.

4 **Print To**
Here you'll select whether check-in labels should be printed to the *Device Printer* or the *Location Printer*. You can set printers for either Devices or Locations under `Admin Tools > Check-in > Named Locations` and `Admin Tools > Check-in > Devices`.

5 **Location Selection Strategy**
Select how you want locations (typically rooms) to be filled during check-in. There are three options to select from:

1. **Ask:** This is the default setting. The person checking in will be asked which location to check in to.
2. **Load Balance:** This will automatically pick the check-in location according to how many people are already checked in to each available location. This helps ensure each location has roughly the same number of people.
3. **Fill In Order:** The first location configured in the check-in group will be filled before the next location starts having people added to it.

The Location Selection Strategy options are only available when the *Inherit from* setting is either Check in by Ability Level, Check in by Age or Check in by Grade. The order of the locations matters, particularly if you have multiple campuses. If you have multiple campuses in your location list, group the locations by campus. For instance, you would list the second campus's locations second, then the third campus's locations third, etc.

6 **Check-in Labels**
These labels are not used by Next-Gen Check-in.

7 **Next-Gen Check-in Labels**
Select which labels you want to print for the groups in these areas. More information on configuring labels can be found below in the All About Labels chapter. The Settings section below also talks about some label configuration options within the *Check-in Configuration*.

### About Load Balancing

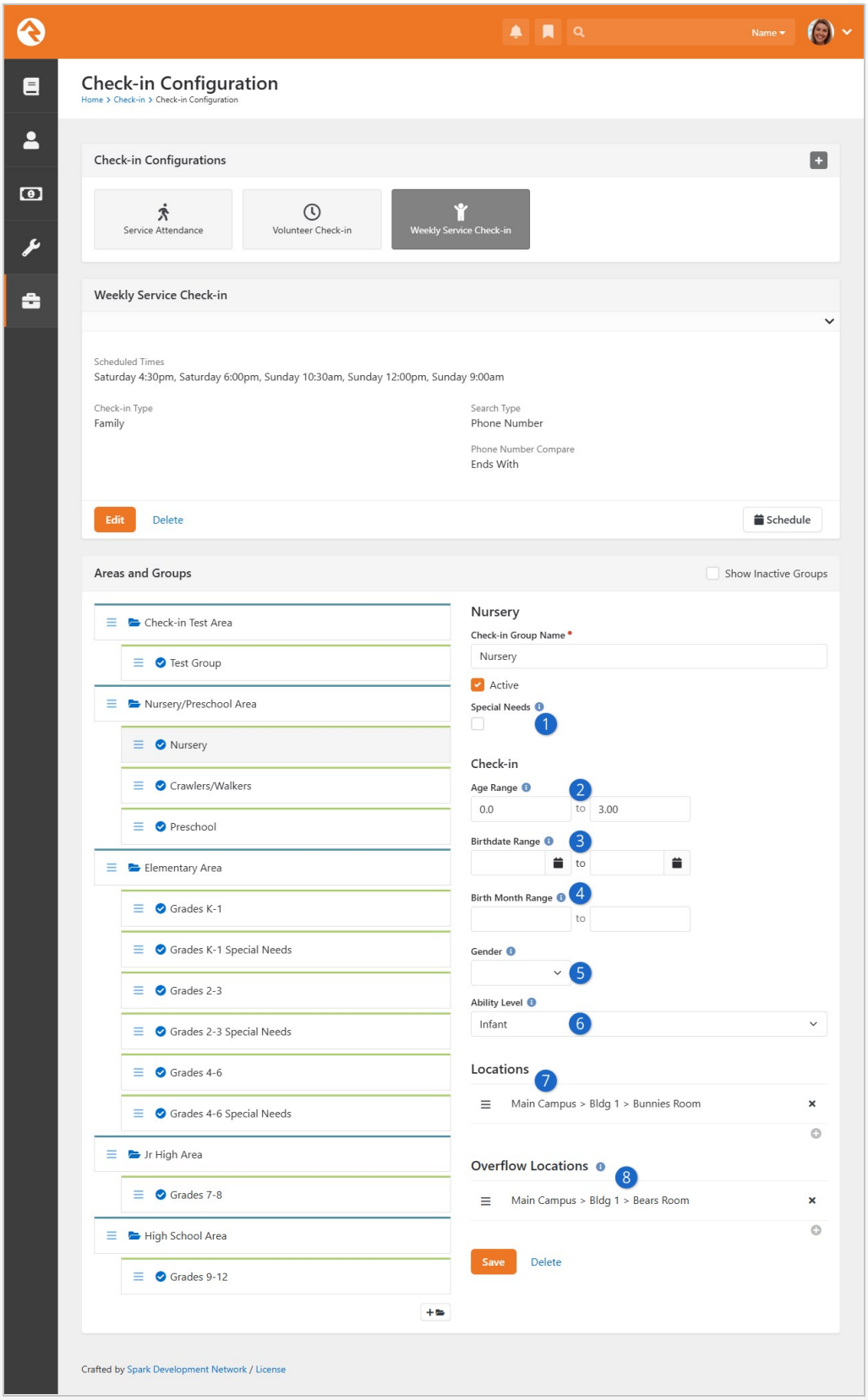
When the Load Balancing option is used, Rock strives to keep family members who belong to the same check-in group (such as twins or a family member with their guest/friend) together in the same location or room within a single family check-in session. To help prevent unwanted splitting, it is recommended to order your rooms by largest capacity first. Additionally, Rock respects each location's capacity (soft threshold) when balancing the load. Consequently, rooms may not always be perfectly balanced when Load Balancing is in use.

### No Labels

If for some reason you do not want labels, just delete them from the Area. It's that simple.

Once you have your areas configured, move down to the groups under each area. You'll notice that groups have a green top border. Under each area, configure the groups that are needed for your organization.

Check-in Configuration (Group)




**1 Special Needs**

If the group is for a special needs population, be sure to check this box. This is part of ensuring that special needs guests have access to the appropriate groups. For details see Configuring for Special Needs.

2. **Age Range**
   These are the ages of the people who should be allowed to check in to a group.

   When a person checks in, Rock reads the age in their profile and compares it to the group's configured age range. For the first number in the range, Rock looks for a "greater than or equal to" condition. For the second number in the range, Rock looks for ages "less than or equal to" numbers *starting with* the second number. So, a child of age 3.9 would still match your "0 to 3" age group, since their age starts with a number less than or equal to the upper range you've configured ("3").

   You can get creative with decimals if you want to be really specific, such as specifying half ages. For instance, one group configured with ages 2 to 2.4 and another group configured with ages 2.5 to 2.9 would put children who've already had their second birthday, but who are not yet 2 1/2 into the first group, and children older than that but who are not yet 3 into the second group.

3. **Birthdate Range**
   This is very similar to the *Age Range* setting and will only allow check-in if the person's birthday falls within this range.

4. **Birth Month Range**
   You can use this range to group people together who were born in the same month. Note that this is only available as part of Next-Gen Check-in.

5. **Gender**
   Groups may be configured by gender. If a gender is selected, only individuals of that gender will be able to check in to the group.

6. **Ability Level**
   Depending on your check-in Area settings, you may see *Grade Range* here instead of *Ability Level*. Depending on your configuration, the person checking in will either need to be at the selected *Ability Level* or must be in the selected Grade.

7. **Locations**
   Select all of the locations where this group will meet. For multi-site organizations, you can use a single group to cover all campuses by adding the appropriate locations for each campus.

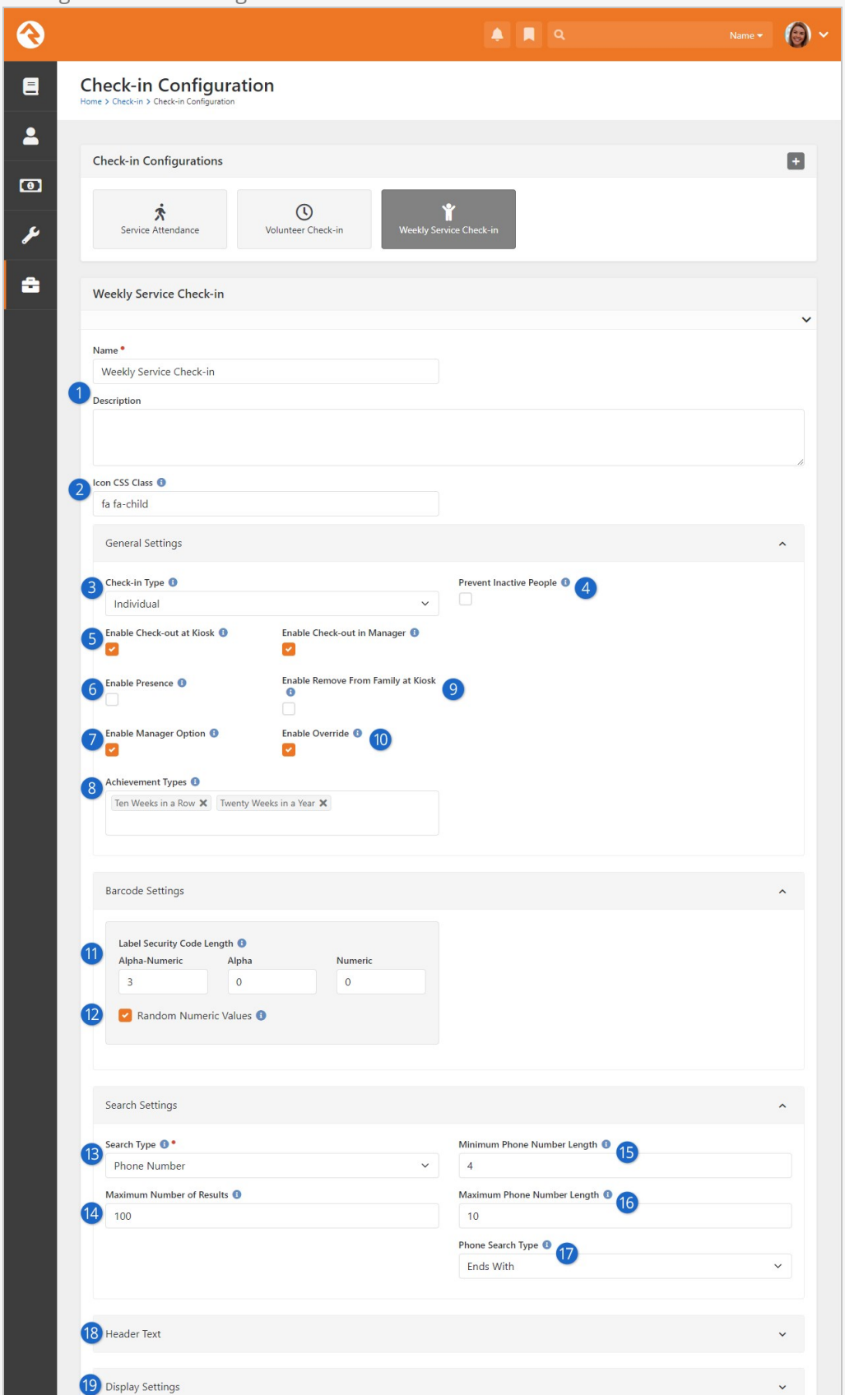
8. **Overflow Locations**
   Part of Next-Gen Check-in, locations listed here will only be used after all of the *Locations* (from the setting above) have been filled. In order for Overflow Locations to be used, they must be scheduled in the check-in Schedule Builder.

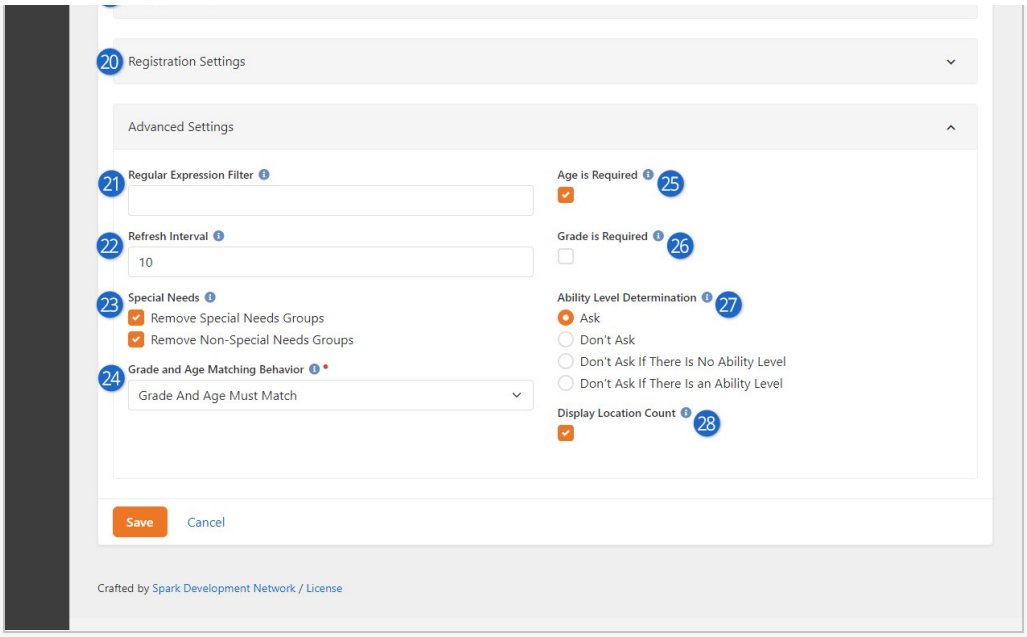
## Settings

There are several settings that can be configured for the check-in type that control the behavior of check-in. While the default values are probably sufficient for most installations, you can change any of them to suit your particular needs. These are

updated by selecting the `Edit` button on the Check-in Type. You get there from `Admin Tools > Check-In > Check-in Configuration`.

## Editing Individual Settings






1 **Name/Description**
Be sure to add a detailed description. Your future self will thank you.

2 **Icon CSS Class**
You can set or change the icon associated with this check-in configuration.

3 **Check-in Type**
This is where you select Individual vs. Family. As described in the sections above, this controls the screen flow when a family checks in. Using the Family check-in type allows a family to check-in multiple family members at one time.

4 **Prevent Inactive People**
Select this option if you do not want people who have an inactive record status to be able to check in. This area of the screen will have additional fields if the Check-in Type is Family (see next screenshot below).

5 **Enable Check-out**
Here you can select if check-out should be allowed on the kiosk, or in Check-in Manager, or in both places. If neither of these are selected, then check-out is disabled entirely.

6 **Enable Presence**
The *Presence* feature allows staff or volunteers to mark a person as 'present'. This is the next step after being checked in and indicates that the person has physically arrived at the room or location. This is a great way to identify how many people are actually taking up a seat, as opposed to people who are checked in but not in the room.

7 **Enable Manager Option**
By default, the Welcome screen in check-in displays a gear that can be used by a manager to close/open rooms, override age limits, etc. If you don't want this to be available, unselect this option.

8 **Achievement Types**
This is where you can add one or more achievement types to be used for check-in celebrations. Each achievement type you add will trigger a

celebration if the check-in results in the achievement being earned. See the Check-in Celebrations chapter below for details.

9. **Enable Remove From Family at Kiosk**
   When enabled, individuals with a "Can Check-in" relationship to a family can be removed at the kiosk without requiring a supervisor login. This action will remove *all Can Check-in* relationships for that person to the family. This means if you have "Can Check in" checked on a *Grandchild* role in the *Known Relationships*, pressing the Remove button will remove that Grandchild relationship from that family's records.

10. **Enable Override**
    If the manager option is enabled, you can still turn off the ability to override age and grade constraints by unselecting this option.

11. **Security Code Length**
    When Rock creates new security codes for labels, it will create the codes using the number of characters you specify in these fields. It will show the alpha-numeric characters first, then alpha characters, and then numeric characters. Typically, you would configure just alpha-numeric characters or a combination of alpha and numeric (typically, you wouldn't use all three). We would recommend using codes that contain at least three characters, as you would be limiting the number of available codes with anything less than that. A three character alpha-numeric provides a total of 13,744 codes to assign in one day, so larger churches who may be expecting to check in more people than that should use at least four characters.

12. **Random Numeric Values**
    When using numeric values as part of the security code, should those numbers be randomly generated? If not, they will be generated in numeric order starting with "1" every day.

13. **Search Type**
    Select how you'd like your families to search for their family (Phone Number, Name, Name & Phone, or Family Id). Remember, using anything besides Phone Number will require that a keyboard is available at each check-in kiosk. Also keep in mind that barcode scanning, RFID check-in and any other keyboard wedge technology is ready to use from the Welcome screen regardless of which option you choose here.

14. **Maximum Number of Results**
    When searching for a family, this is the maximum number of families that will be returned.

15. **Minimum Phone Number Length**
    Individuals will be required to enter this many digits of their phone number before being able to search.

16. **Maximum Phone Number Length**
    Individuals won't be able to enter any more than this number of digits when searching.

17. **Phone Search Type**
    When searching for families with a matching phone number, you can elect for Rock to search for phone numbers that end with the digits that were entered, or search for any phone numbers that contain those digits

(anywhere in the number). The best choice probably depends on the size of your database. If you are a large organization with tens of thousands of phone numbers, you probably want to use the "ends with" option. This will require that your families know they need to enter the last digits of their phone number.

18 **Header Text**
These settings are not used by Next-Gen check-in.

19 **Display Settings**
These settings are not used by Next-Gen check-in except for the Hide Photos option. If you've selected a *Check-in Type* of Family, you'll see this option to hide the family member photos that are shown after a family is selected.

20 **Registration Settings**
This is an advanced setting that is explained in the Check-in Registration section.

21 **Regular Expression Filter**
Used only with phone number search, this is an advanced setting that can be used to remove any special characters from the search string before using it to search the database. This would only be needed if your kiosks have a keyboard that can be used to enter special characters or if you needed to strip off a unwanted prefix value. For example, `[0](\d*)` would remove a 0 prefix from the entered number.

22 **Refresh Interval**
This setting is not used by Next-Gen since kiosks are notified about configuration updates in real-time.

23 **Special Needs**
This advanced setting is explained in the Configuring for Special Needs section.

24 **Grade and Age Matching Behavior**
This advanced setting is explained in the Grade and Age Matching Behavior section.

25 **Age is Required**
If a family member doesn't have a birthdate entered in Rock (i.e., age) should they still be able to check-in to group types and groups that have an age restriction?

26 **Grade is Required**
If a family member doesn't have a graduation date (i.e., grade) should they still be able to check in to group types and groups that have a grade restriction? For more details on how Rock handles grades and promotion from one grade to the next, see our `Person and Family Field Guide`.

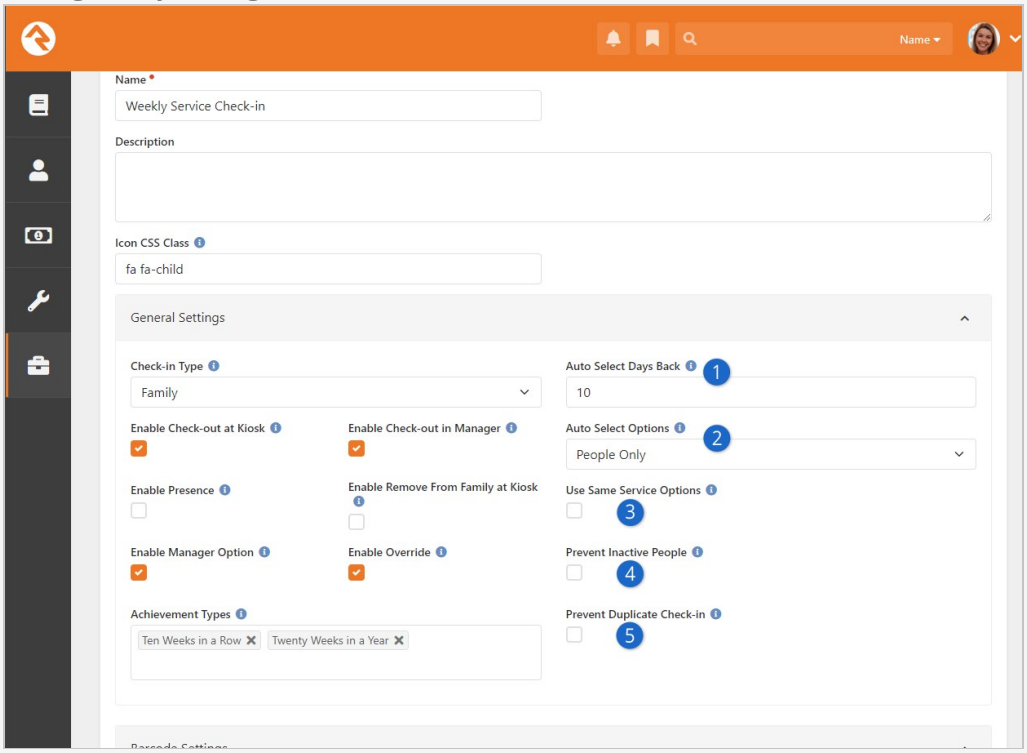
27 **Ability Level Determination**
This controls whether or not the Ability Level Selection should be shown during check-in. You would set this to *Don't Ask* if you don't want parents to select the ability level for their child because you have an outside/external system in place to gather that information. Choosing *Don't Ask If There Is No Ability Level* will allow a person with a set ability level the opportunity to update it, while a person without an ability level

set will not be asked to select one. Lastly, Choosing *Don't Ask If There Is an Ability Level* will *only* ask if the person does *not* already have an ability level.

28 **Display Location Count**
When the Location Selection screen is displayed for families to choose a location to check a family member into, should that location listing display the current count of people already checked into that location?

The General Settings have a few extra options if the *Check-In Type* is set to Family. Below we have descriptions for those settings that only apply if you are using the Family Check-In type.

Editing Family Settings




1 **Auto Select Days Back**
This is the number of days back that Rock will look for a previous check-in when deciding whether a family member should be selected by default when using the Family check-in type.

2 **Auto Select Options**
You can choose to auto select people only, or people and the location they are being checked into, based on their previous check-in data. See the Auto Check-In section below for more details.

3 **Use Same Service Options**
When using the Family check-in type, people will be asked to select the area, group and location for each person and each service time they selected. If you would like families to only have to select these options once for each person (i.e., not for each service), select this option. When selected, Rock will automatically select the same area, group, and location for the other service times assuming the same options are available.

4 **Prevent Inactive People**
Select this option if you do not want people who have an inactive record status to be able to check in.

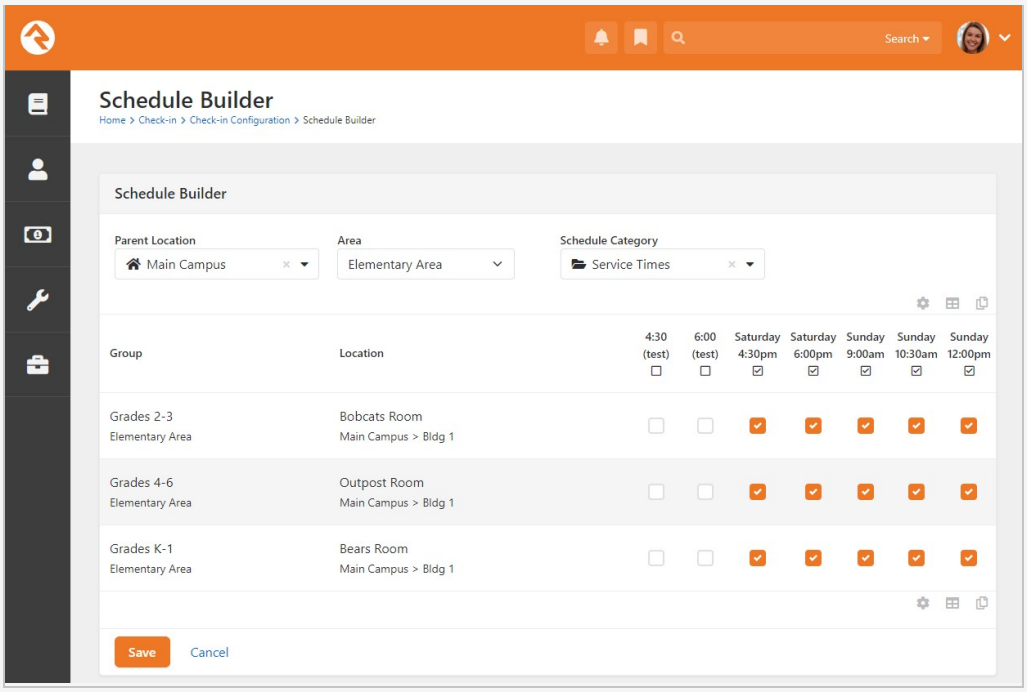
5 **Prevent Duplicate Check-in**
Selecting this option will result in people not being allowed to check in during a particular service time if they have already checked into any group/location already for that same time. See also the *Prevent Concurrent Check-in* in the Areas and Groups section.

## Location Schedules

Now that we have many of the details covered, we can schedule the locations and their availability. This allows you to configure check-in to only allow certain rooms to be used at specific times. We'll do this from the Schedule Builder.

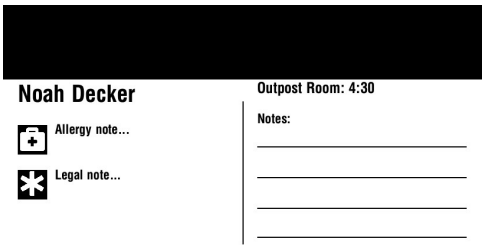
1. First head to `Admin Tools > Settings > Check-in Configuration`.
2. Select the `Schedule` button in the lower right corner of the check-in configuration screen.
3. Now you'll see a large grid. Each combination of location/group will have a row, while each possible schedule time will have a column. To make configuration easier, you may wish to filter the locations by a specific campus or building, check-in area, or schedule.
4. Check the check box for each schedule time when you wish to allow check-in for the specific location/group.
5. Don't forget to click the `Save` button at the bottom of the screen.

Schedule Builder



# All About Labels

Out-of-the-box, Rock comes with a sample set of labels for use with check-in: Child Label, Note Label, Parent Label and Name Tag. There are five different types of labels, each suited to different scenarios: *Family*, *Person*, *Attendance*, *Checkout*, and *Person Location*-based. To learn more about label types, see the Appendix - Label Types

| Label Description | Sample |
|---|---|
| **Child Label:** This is the label that will be placed on the child. It uses the *Person* label type. |  |
| **Note Label:** This label highlights any allergy or legal notes as well as providing a place for writing custom notes. It uses the *Person Location* label type. |  |
| **Parent Label:** This is the label that will be handed to the parents at check-in to be used as a token for checking the child out. It uses the *Family* label type. |  |
| **Name Tag:** This label can be used as a name tag for volunteer or event check-in. It uses the *Person* label type. |  |

### A Note On First Visit

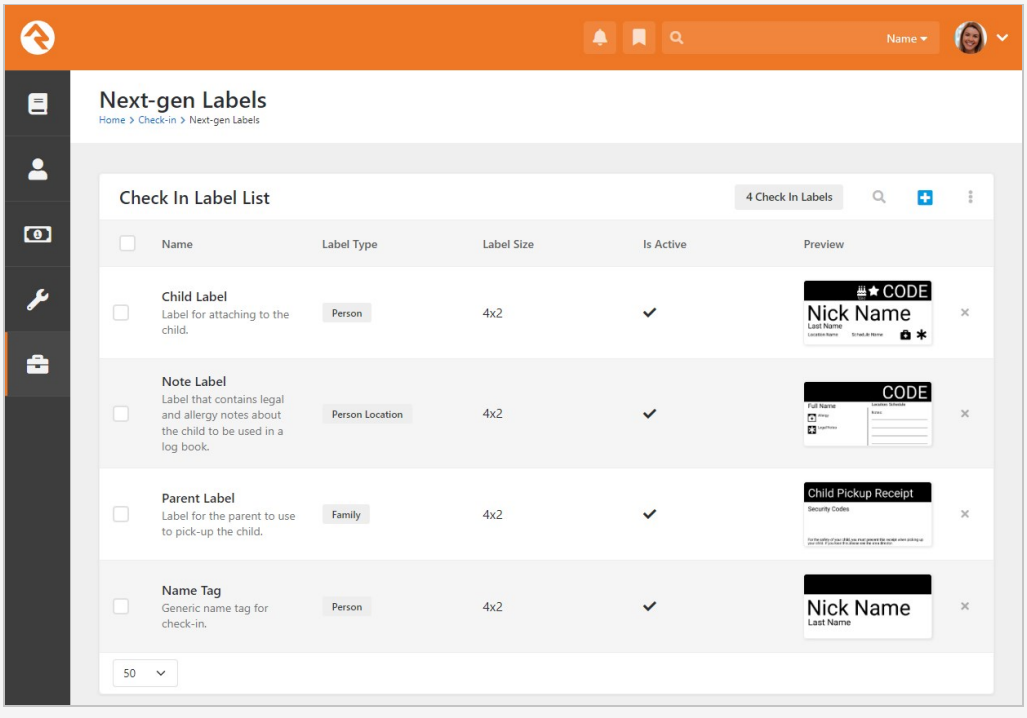
The first visit check-in icon will display if it's the child's first time checking into a group of any type (they've never checked into any group before). The flag does not look at the 'First Visit' person attribute, instead it solely uses group attendance data.

# Label Designer

The Label Designer feature in Rock offers a straightforward interface for creating custom labels tailored to different check-in scenarios. In the past, you may have needed to code labels using ZPL, which required significant technical expertise. Now, the Label Designer eliminates the need for complex coding, allowing you to add elements like text, icons, and security codes to your labels with just a few clicks. This feature is an incredible improvement, whether you're designing labels for children, volunteers, or attendees.

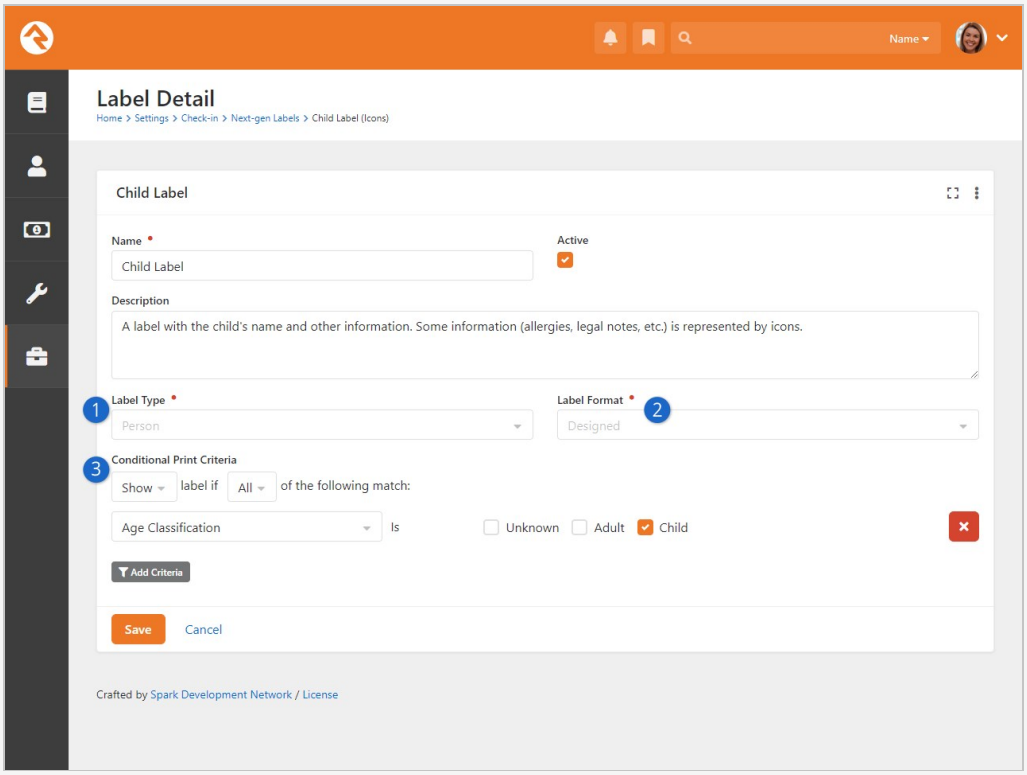
When designing a label, there are two main steps to the process: giving the label a name and filling out essential details, and then designing the actual label. You can access the first step by navigating to `Admin Tools > Settings > Check-in > Next-gen Labels`. Let's walk through these steps to understand what's involved.

Working with Label Setup




## Label Setup

Next-Gen Labels




1. **Label Type**
   Rock offers five label types to choose from, each suited to different scenarios.
   - **Family:** Prints once per check-in, regardless of how many individuals are checked in.
   - **Person:** Prints for each individual.
   - **Attendance:** Prints for every attendance record, such as when checking a person into multiple services.
   - **Person Location:** Prints for every person at each location, meaning if the person checked into two different rooms for two two services they would get two labels, but if they checked into the same room for two services they will get one label.
   - **Checkout:** Prints for each person during check-out.
2. **Label Format**
   You can opt to use the Label Designer or revert to ZPL coding for compatibility with older label formats. While you generally can't directly copy your legacy ZPL code, you can get close. The Lava merge fields are different but should provide the same data.
3. **Conditional Print Criteria**
   In certain cases, you may want the label to print under specific conditions. This section lets you define those conditions so that the label only prints when appropriate.

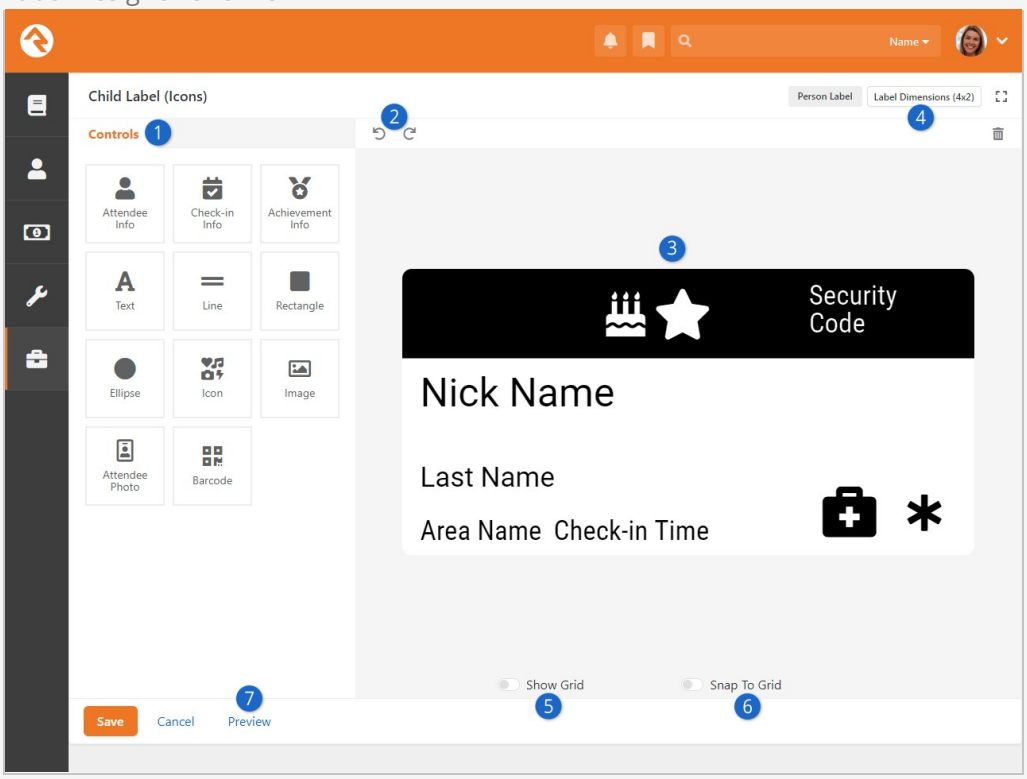
With the basic setup complete, you can now start designing the label itself. After creating a new label, click on the Label Designer button to begin customizing your

label's layout.

## Creating Custom Labels

The Label Designer provides a blank canvas and a panel of controls on the left, which you can drag and drop onto the label. Adding images, security codes, or text is as simple as selecting the desired control and positioning it on the label. Let's explore a few key features to help you get the most out of this design tool.

Label Designer Overview




1. **Controls**
   The Controls panel on the left side of the screen is where you'll find various elements, such as text, images, and icons. Simply drag the control from the panel onto your label to include it. Each control offers unique customization options, like font size and alignment, so you can fine-tune the label to your needs.

2. **Undo and Redo**
   Mistakes are easy to correct. You can undo any action with [CTRL+Z], and if you change your mind, redo it with [CTRL+Y]. These familiar keyboard shortcuts work within the Label Designer, making the design process more flexible.

3. **Label Designer Canvas**
   The canvas is the area where you'll arrange your controls. It offers a blank space for creativity, with options to add and modify various elements.

4. **Label Dimensions**
   Most labels are typically 4x2 inches, but you can adjust the dimensions to whatever size you need. Since there's no predetermined list of sizes, you

have complete flexibility here.

5 **Show Grid**
If you want to align your label elements more precisely, you can enable a grid overlay. This helps ensure that text, icons, and other components are positioned neatly and consistently.

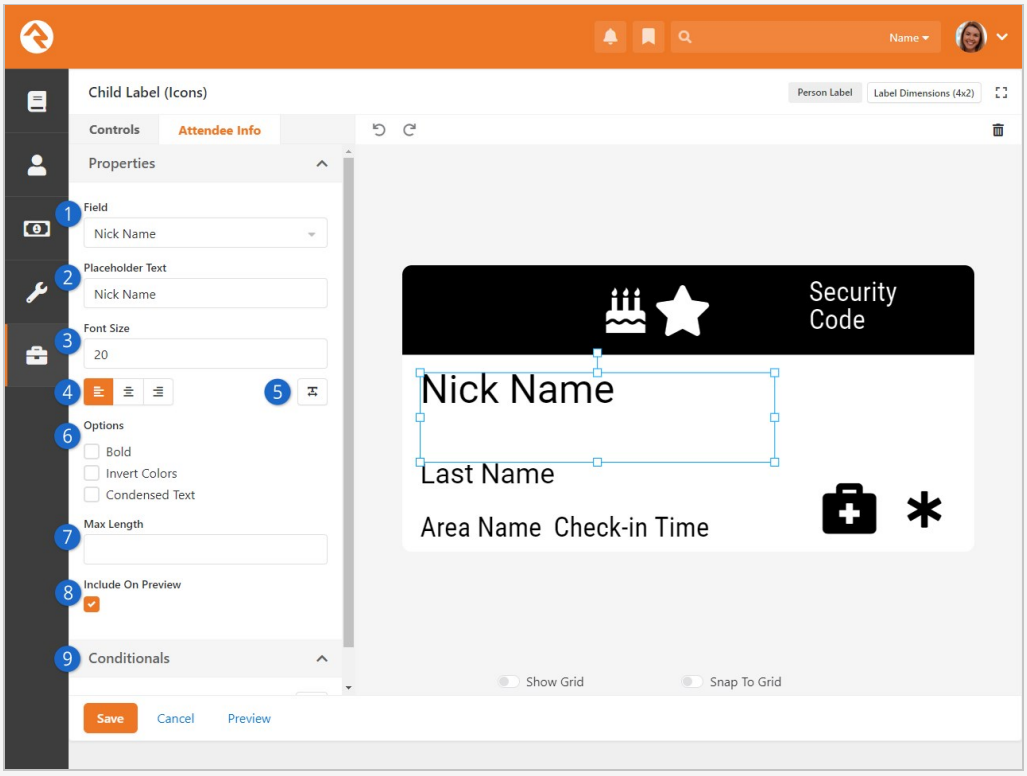
6 **Snap to Grid**
Enabling the Snap to Grid feature forces all elements to align with the grid, further enhancing the professional appearance of your label.

7 **Preview**
Before finalizing your label, use the Preview feature to test how it looks with real data. You can even preview labels for different check-ins by providing an Attendance ID. Previewing is essential to catch potential layout issues before finalizing your design.

## Customizing Controls

Every control you place on the label comes with its own customization options. For example, the Attendee Info control lets you display attendee-specific details such as name, birth date, or custom attributes. As you design your label, it's a good idea to review these settings to ensure the final product looks exactly how you want.

Customizing Controls




1 **Field**
This option determines what data is shown on the label. You can choose from a variety of person properties like name or graduation year, or even

attributes like allergies.

2. **Placeholder Text**
   Placeholder text provides a preview of what will be displayed on the label. For instance, you might want to replace the default placeholder with specific names like "Noah" and "Decker" to see how the final label will appear.

3. **Font Size**
   Adjust the font size to fit the available space. Use the Preview feature to make sure your font size works for names of different lengths.

4. **Alignment**
   You can align text to the left, right, or center of the label. For example, you might align items on the right side of the label differently than those on the left.

5. **Adaptive Font Size**
   To ensure longer names fit on the label without cutting off or overlapping, the Adaptive Font Size feature will adjust the font size based on the length of the text according to the configuration you add here.

6. **Options**
   You can bold the text, invert the colors, or enable condensed text. These customization options are helpful when trying to fit more information onto a label or create a visually striking design.

7. **Max Length**
   This feature limits the length of the text, adding an ellipsis when the text exceeds a certain number of characters. For instance, setting a max length of 10 for a name like "Christabella" would display "Christa..." instead.

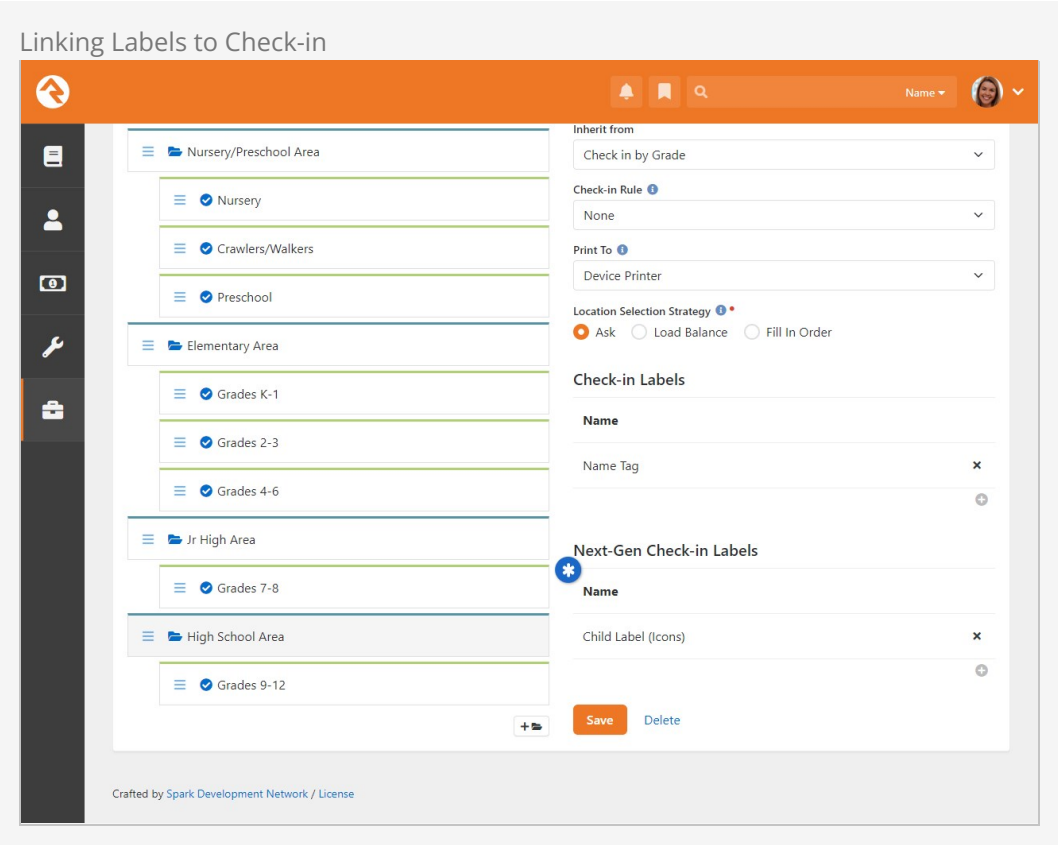
8. **Include on Preview**
   If certain controls overlap but shouldn't appear at the same time (e.g., birthday icons for today vs. this week), this option lets you hide specific controls in Preview to avoid confusion.

9. **Conditionals**
   The conditional feature allows you to show or hide a control based on certain criteria, such as a person's birthday or check-in location.

Finally, you can right-click on any control to manage its layering. This enables creative designs by allowing elements to overlap and appear in front of or behind other elements, like the cake and star icons in the example shown above.

## Linking Labels to Check-in

Once your labels are designed, you'll need to link them to the appropriate check-in configurations under `Admin Tools > Settings > Check-in Configuration`. Make sure each label is correctly assigned to its corresponding check-in area, just as you would with legacy labels. This is done under the *Next-Gen Check-in Labels* section as pictured below.




If you've been using labels in Rock prior to v16.7, you'll need to replicate those labels in Label Designer. So, if a check-in area previously had a Parent Label and a Child Label, you'll need to create a matching Parent Label and Child Label in the Label Designer.

# Kiosks

Kiosks are the hardware devices used to check-in. Setting up kiosks allows you to specify the check-in configuration for a specific device or set of devices. This is helpful if, for example, you have a set of kiosks in your youth area and only want them used for the services in that area.

The two main configuration points for the kiosk are:

1. **Locations:** Kiosks are assigned to allow check-in for selected locations.
2. **Printing:** Kiosks also help manage how and where printing takes place. See the Printing section for more options for label printing.

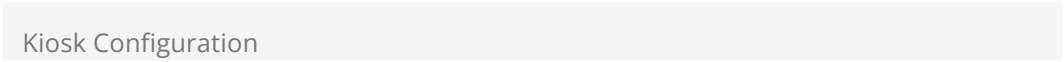
## Configuring Kiosks

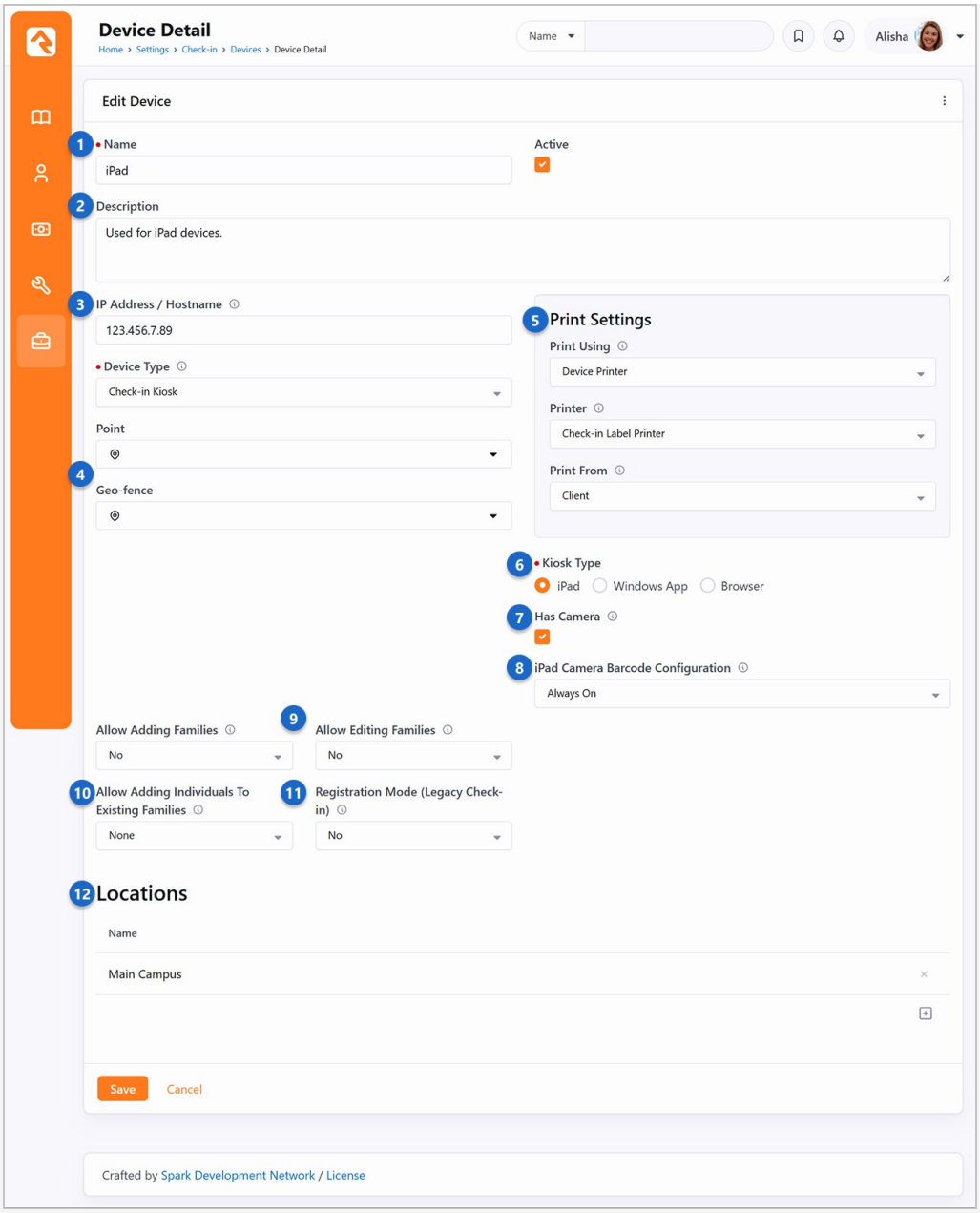
You can manage your check-in kiosks under `Admin Tools > Check-in > Devices`. Keep in mind that Rock supports multiple types of devices. Check-in kiosks are just one type. (Printers are also configured here.)

When the check-in system starts up, it lists the kiosk devices so the attendant can select which kiosk configuration to use.

It's also helpful to know that when you define a check-in kiosk configuration, it can be used on multiple physical machines at the same time. This means that when you define a check-in kiosk for use in your youth building, that definition can be used for each check-in computer or tablet in that area. Think of these configuration definitions as kiosk templates, not physical machines.

Whether you are adding a new kiosk or editing an existing one, you'll use the screen below to manage the configuration.






1 **Name**
The name is used at check-in startup to select the kiosk device to use for that session.

2 **Description**
A brief description documents the details of the configuration.

3 **IP Address**
Provide an IP address here if you want that address to be available for identification purposes. The *Check-In Admin* block checks for devices configured with the same IP address as the device being used for check-in. If it finds one, it automatically selects that device and all of the group types associated with it. Because this process is automatic, in this scenario the attendant would be taken directly to the *Welcome* screen, bypassing the *Check-In Admin* screen. On a related note, the *Enable Kiosk Match By Name* field in the *Check-In Admin* block settings searches for devices based on both IP address and hostname when looking for a matching

kiosk.

4. **Point/Geo-fence**
   This allows you to define the latitude/longitude and geo-fence of the kiosk device. The geo-fence setting is used by [Classic] Mobile Check-in. The latitude/longitude settings will be used to support future applications.

5. **Print Settings**
   These three settings define how printing will work. Be sure to read more in the Printing section.
   a. **Print Using:** Tells the kiosk how to determine which printer to use.
      i. **Device Printer:** Uses the printer defined in the Printer setting below
      ii. **Location Printer:** Uses the printer defined for the location
      iii. **Group Type:** Uses the print logic defined by the group type
   b. **Printer:** If you selected *Device Printer* above, you will need to select a printer to print to.
   c. **Print From:** While the previous two settings helped define where to print *to*, this setting determines where to print *from*.
      i. **Client:** This is the best option, but it assumes that you will be using the iPad application or Windows application. If you are running check-in inside a web browser, you won't be able to print from the client.
      ii. **Server:** With this option, the printing will be done from the web server. This requires the web server to be on the same network as the printer. If you are hosting Rock on an external webhost, printing from the server requires Rock Cloud Printing.

6. **Kiosk Type**
   Select the type of kiosk that will be used for check-in. This will depend on the type of device you're using. Each of the three Kiosk Types support QR code scanning to identify the person, provided the device has a camera. The QR code scanning feature requires using the Aero theme if you're checking in using the Windows App or a browser. Scanning of QR codes generated by [Classic] Mobile Check-in is still limited to iPads only.

7. **Has Camera**
   This option must be enabled to use a device's built-in camera for scanning barcodes or QR codes.

8. **Camera Barcode Configuration**
   Select the camera configuration setting that applies best to how the *Device* will be used. See the iPad Application section for a description of each Camera Barcode Configuration option. This setting only applies to iPads.

9. **Allow Adding/Editing Families**
   Add new families or update existing ones during check-in, including managing household members. To protect data quality, it's usually used at volunteer kiosks, where trained helpers can make accurate updates. See the Check-in Registration chapter to learn more.

10. **Allow Adding Individuals to Existing Families**
    Controls who can be added to an existing family during check-in, regardless of whether *Allow Adding/Editing Families* is enabled. This provides finer control over which kiosks can link new people to existing

households.

11 **Registration Mode (Legacy Check-in)**
This setting allows you to turn the kiosk into a volunteer assisted, walk-up registration station where your volunteer can quickly add a person or guest to an existing family. See the chapter on Check-in Registration below for details. Note this mode is only used for legacy check-in.

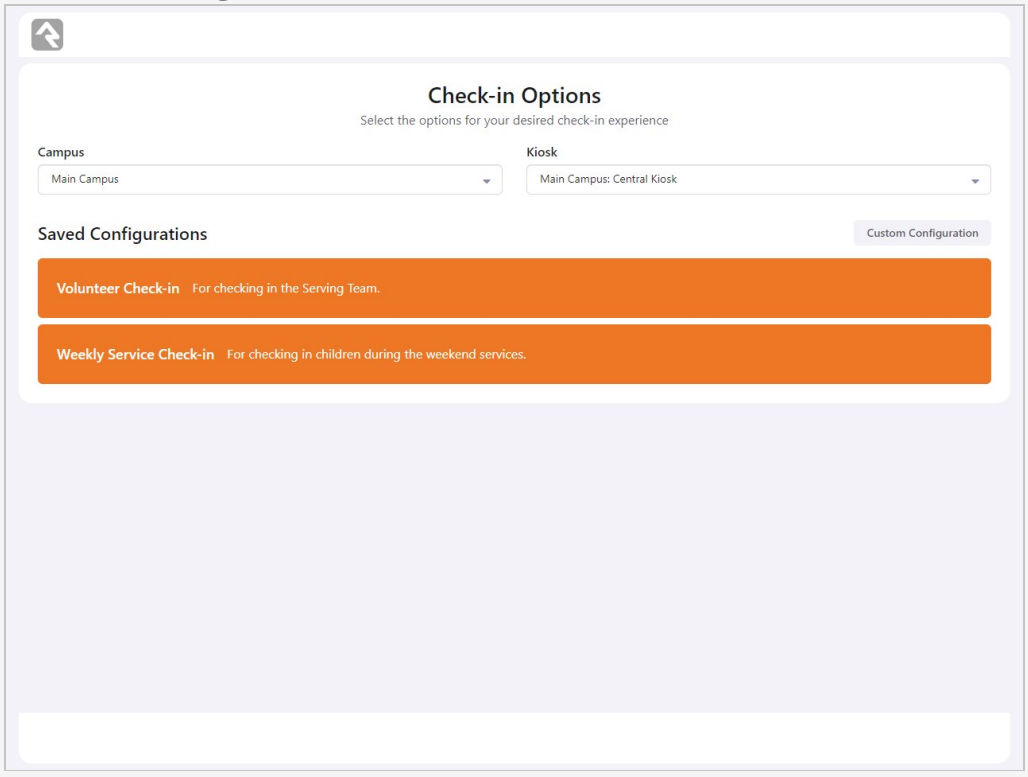
12 **Locations**
This setting allows you to define which locations the kiosk is serving. This will limit the location options that are displayed to the guest. For centralized check-in you will want to enable all locations. Since locations are hierarchical in nature (they have parent and child locations), you can select a parent location and all of its children will also be automatically selected.

## Next-Gen Kiosk Setup

When setting up your kiosk you can save your choices, so you don't have to provide the theme, configuration template, and area selections every time the kiosk starts. You can even have multiple saved configurations if the kiosk is used for different purposes. When the kiosk is turned on, simply tap the button for the desired configuration, and everything will immediately be ready to go.

> **Next-Gen Check-In**
> The ability to save kiosk configurations is only available with Next-Gen Check-in and requires Rock v16.7 or later.

Kiosk Saved Configurations



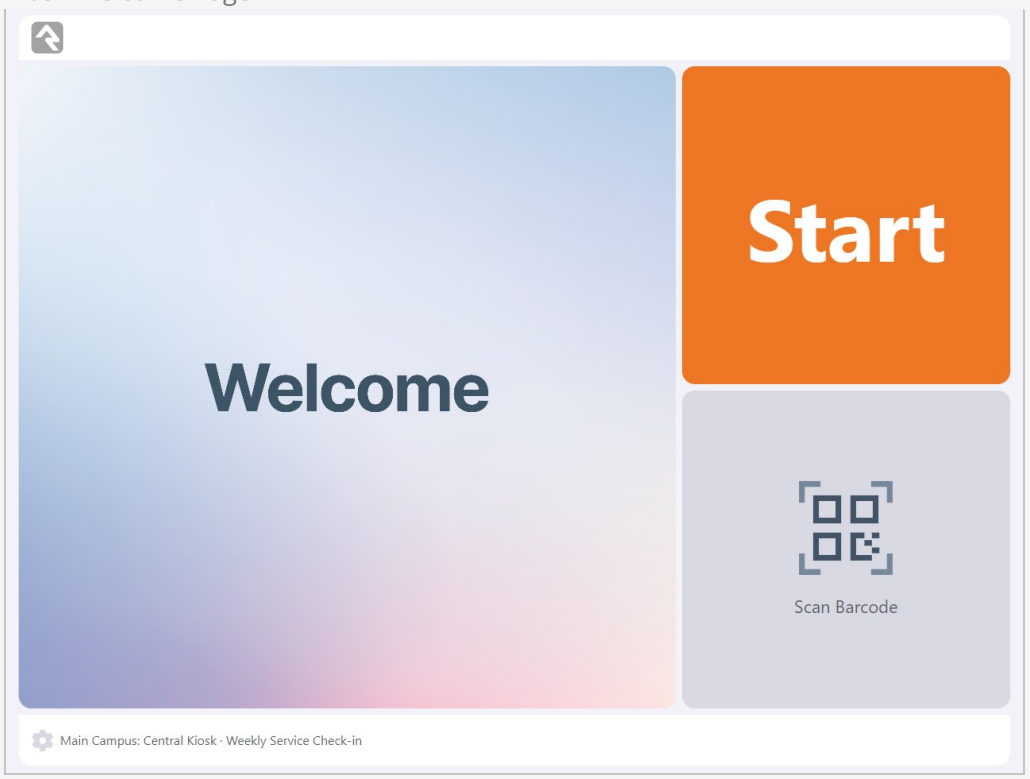

The saved configurations are simply Defined Values. If you need to delete one and start over, you can do so under the *Saved Check-in Configurations* Defined Type.

For setup, you'll use the following URLs:

- **Setup Page:** `/nextgen-checkin/setup`
- **Kiosk Page:** `/nextgen-checkin`

If you need to change your kiosk's settings often, point it to the setup page. Otherwise, you can set it to go directly to the kiosk page. The very first time you go to the kiosk page it will take you to the setup page. After that, it will remember your settings and go straight to the kiosk page.

Kiosk Welcome Page




## Kiosk Ads

Rock's check-in system provides a convenient and welcoming experience, often with kiosks set up for parents to easily check in their children. When a parent approaches a kiosk, they simply press the "Start" button or use the QR Code button. From there, the kiosk guides them through the check-in steps and prints out the appropriate labels for their children.

When the kiosk isn't in use, it displays a "Welcome" screen. By default, this screen has a large central "Welcome" image, with Start and QR Code buttons off to the side. But rather than just a simple greeting, Rock offers a way to make this screen space more impactful through Kiosk Ads.

With Kiosk Ads, you can replace or complement the default image with one or more of your own. This lets you promote your organization's events, make an announcement, or highlight volunteer opportunities—all front and center. Simply upload your custom images at the recommended size of 2200x1400, and you're ready to capture attention and share what matters most.

> **Next-Gen Check-In**
>
> The Kiosk Ads feature is only available with Next-Gen Check-in.

> **Kiosk Ad Permissions**
>
> Permissions set on individual *Content Channel Items* are **not enforced** for Next-Gen kiosk ads. All ads in the assigned Content Channel will display on the kiosk welcome screen, regardless of item-level security settings.
>
> If you want to control which ads appear, you can create multiple ad channels and assign them to different check-in areas. You can also filter by campus in the check-in configuration to tailor the ads for each location.

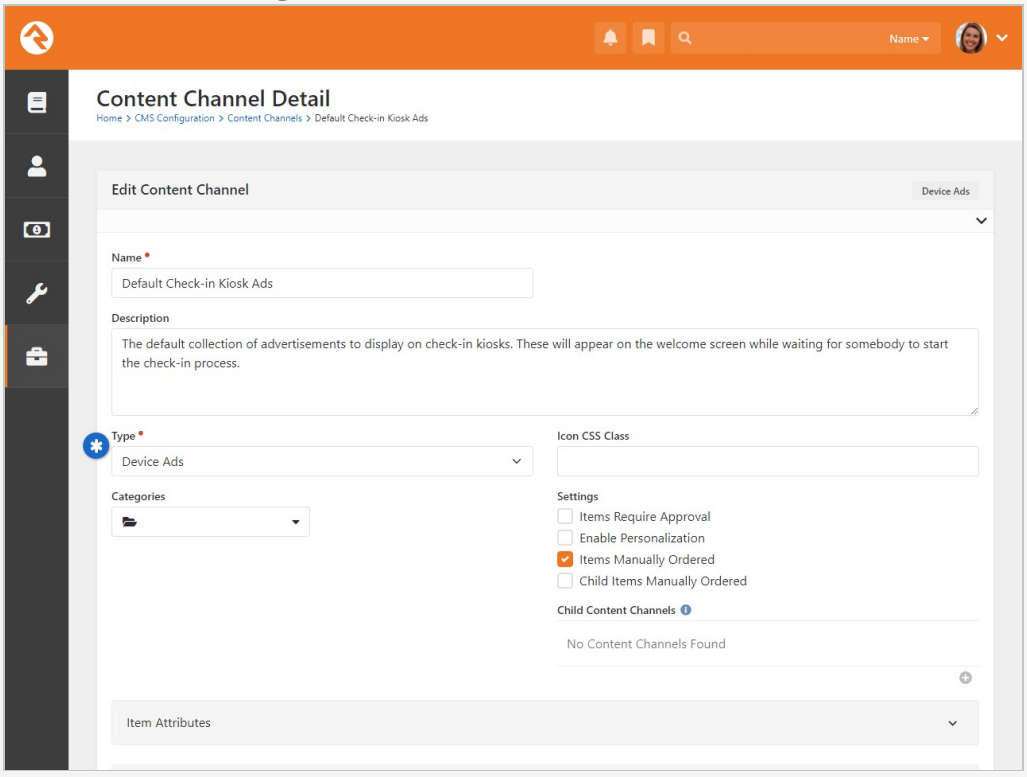
### Setting Up Custom Kiosk Ads

To set up Kiosk Ads in Rock, you'll use Content Channels. Each ad displayed on the kiosk is a Content Channel Item. Rock provides a pre-configured Content Channel specifically for these ads, called "Default Check-in Kiosk Ads."

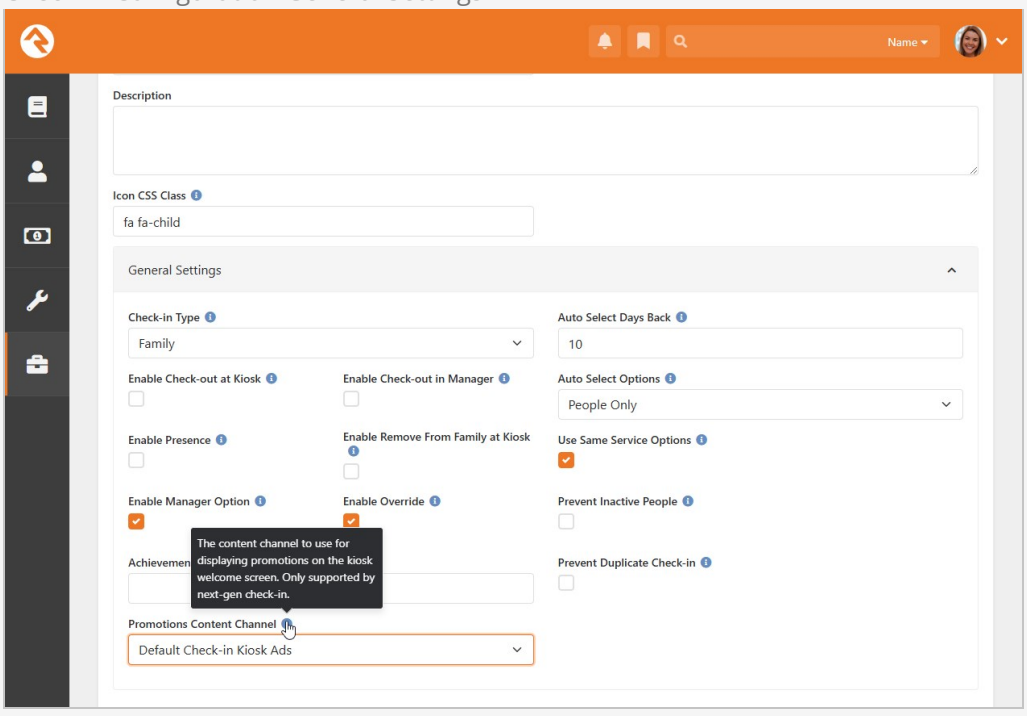
To get started, navigate to `Admin Tools > Content Channels` and select the "Default Check-in Kiosk Ads" Content Channel. You'll see a list of existing ads (Content Channel Items) available to your kiosks.

As pictured below, if you decide to set up a new Content Channel for kiosks, just remember to select "Device Ads" as the Channel Type. This ensures compatibility with the check-in kiosks. After it's created, you'll need to update the Check-in Configuration Type's *General Settings* for the welcome screen to show items from your new Content Channel.

Content Channel Configuration

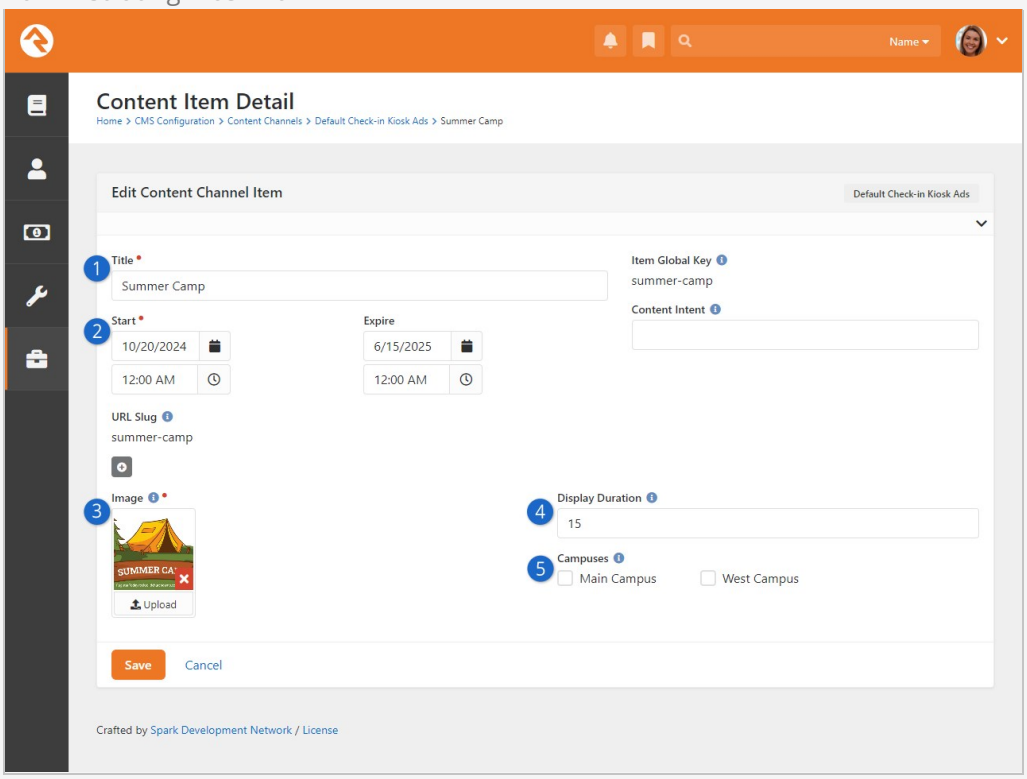



Check-in Configuration General Settings




Next, let's take a closer look at a Kiosk Ad Content Channel Item. Pictured below you can see a custom Item that's been created.

Administrating Kiosk Ad




1. **Title**
   Add a clear, descriptive title so you can easily tell your ads apart.
2. **Start/Expire**
   You can set start and end dates for when the ad appears on kiosks. Neither field is required, so feel free to use one without the other.
3. **Image**
   Upload your image here. The recommended size is 2200x1400 to ensure it displays properly on kiosks.
4. **Display Duration**
   Specify how long the image stays on screen. You can assign unique durations to each ad; it can be 5 seconds for one and 30 seconds for another, or 10 seconds for all of them. Each image has its own timing.
5. **Campuses**
   For churches with multiple locations, you can choose which campuses should display the ad, tailoring the content to each audience.

And that's it! With the above Content Channel Item in place, your welcome screen (located at `/nextgen-checkin`) will automatically pick up the new image and display it according to your configuration.

# Locations

Locations configure where individuals can check in. Think of them like buildings or rooms for your check-in. Locations are tied to check-in groups and enabled through schedules. Let's take a look at an example to see how they work.

Sample Configuration

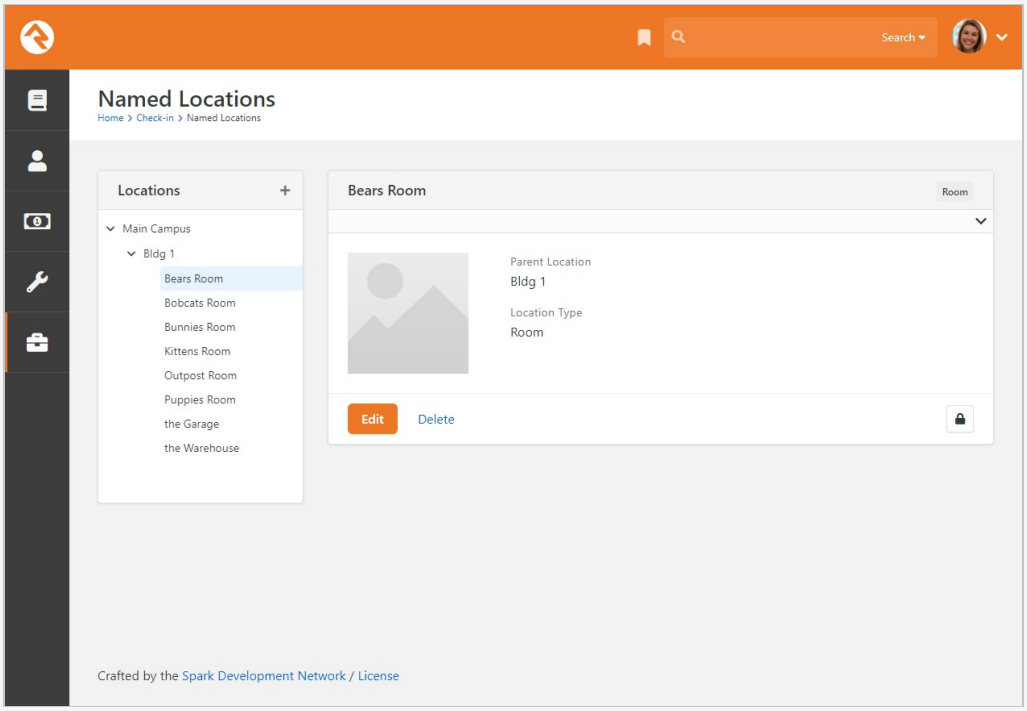

The diagram above shows a configuration for a large church's *Three Year Olds* check-in group. As you can see, the church has two campuses it calls *North* and *South* and each of these campuses has multiple locations (aka, rooms) for their three-year-olds. Based on attendance patterns, all of these rooms are not needed during all services. In this configuration, the *Crickets Room* is not set up to be used during the second service of the day.

## Editing Locations

Locations are edited under `Admin Tools > Check-in > Named Locations`. Locations are

hierarchical in nature, so build them out to match the structure of your buildings.

Named Locations




## Scheduling Locations

Group/Location pairs are matched to schedules at `Admin Tools > Check-in > Check-in Configuration` (click the `Schedule` button.)

## Opening / Closing Locations

We've seen how you can enable or disable a location based on a schedule. Each location also has an open/closed state. Say for instance you want the *Bears Room* to be used for your 9:00 am service but need to be able to close it if it reaches capacity. Once it reaches capacity, you can close the room from the Check-in Manager or the Device Manager (more info on these below) and it will no longer be available as an option for check-in.

Of course, you probably don't want to keep the room closed forever. If you've closed the *Bears Room* for your 9:00 am service, you'll want it open again for your 10:30 am service. You can manually open rooms the same way that they were manually closed, or you can configure the Auto Open Locations job to reopen them for you automatically at certain intervals.

## Location Thresholds

In addition to simply closing rooms manually, you can also configure locations to have threshold limits for the number of people that can be checked into the location at once. These limits are evaluated during check-in and once they are reached, the location will automatically stop being available as an option for people to check into.

1. **Threshold:** If this number is reached, check-in will not allow people to check into the location unless an attendant overrides the threshold.
2. **Threshold (Absolute):** Once this number is reached, check-in will not allow people to check in to the location unless an attendant performs an override check-in.

# Printing

As we mentioned in the Welcome section, Rock's check-in is very flexible. This is especially true when it comes to printing. What printer you print to and where the printing takes place (client or server) is completely customizable. While this is very powerful, it can be a bit confusing. To help get you started, we have outlined a simple approach that should work for most organizations. We'll also dive a little deeper for those who want more options.

## A Simple Approach to Printing

The recommended approach to printing is to always print from the client using the printer defined on the client. While this is a simple approach, it should meet the needs of most organizations.

- We recommend that you use either the iPad or Windows client application for running check-in.
- On your check-in kiosk device configuration set the *Print Using* setting to *Device*, leave the *Printer* setting blank and choose *Client* for the *Print From* setting. See the Kiosks chapter for more on these settings.
- Configure the iPad/Windows application to print to a specific printer.

> ### Printers with DPI Settings Other Than 203
>
> Rock assumes your printer's resolution is 203 Dots Per Inch (DPI) by default. If your printer uses a different DPI—like 300, which is common—you'll need to take additional steps. You'll define a printer with the correct DPI settings and connect it to your Kiosk. Details are provided below.

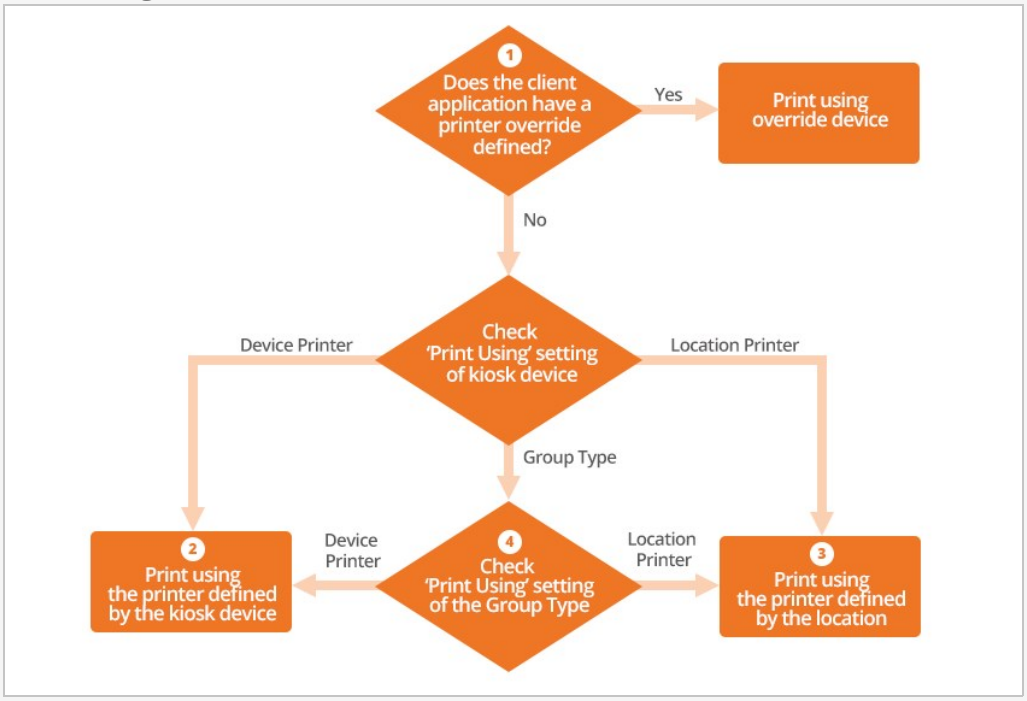
## Diving Deeper Into Printing

Ok, so the simple approach doesn't work. Never fear, we have many more options for you. When we break down the printing process, there are two bits of information that need to be determined: where to print and how to print. Let's look at each in detail.

### Where to Print

The flowchart below breaks down the logic of how Rock determines where to print the check-in labels.

Determining Where To Print




1. **Override**
   If using the iPad or Windows application, you can set a printer override that diverts all printing to the printer you define on the client.
2. **Devices**
   If the kiosk device's *Print Using* is set to *Device Printer*, the printer defined by the kiosk device will be used. These settings can be found under `Admin Tools > Check-in > Devices`.
3. **Location**
   If the *Print Using* is set to *Location*, then the printer defined by the group's location will be used. The location's printer is defined under `Admin Tools > Check-in > Named Locations`.
4. **Group Type**
   Finally, if the *Print Using* is set to *Group Type*, then the *Print Using* setting of the Group Type will be considered. This setting can be configured to get the print device from the Location or the Kiosk Device. This is set under `Admin Tools > General Settings > Group Types`.

### Quick Shortcut

This may seem a bit complex. You might be wondering why all this is needed. If you want to get creative, these features will allow you to customize label printing so that some groups print at the device and other groups print inside the actual room. Remember to keep it simple. You can define the printer on the kiosk and forget the chart above. It'll be there when you need it.

### How to Print

Determining *how* to print is much easier than figuring out *where* to print. You can print either from the server or the client. This is determined on the kiosk configuration under `Admin Tools > Check-in > Devices`. But wait, there are a couple of considerations for each of these options:

- **Client:** To be able to print from the client you must use either the iPad or Windows applications. This is the method you will use when your Rock server is hosted externally.
- **Server:** To print from the server you must be sure that the server is on the same network as the printers (or more accurately, the server must be able to route IP to the printers). If you are hosting Rock externally, you won't be able to print from the server unless you do something crazy like a VPN between your hosted server and local printers. Or, since you're not crazy, you can use the Rock Cloud Printing feature covered in a later chapter.

> #### Label Size?
> Before you get too far into printing labels, we should probably mention that the *size* of the default labels that ship with Rock is 4 x 2 inches. If you plan on using the built-in labels, this is the size you should purchase.
>
> You can of course create your own labels to work on any size stock you choose (as often happens when switching from another system and you already have a bunch of, say, 3 x 2 stock) but more about that in the Creating Custom Labels section.

## Reprinting

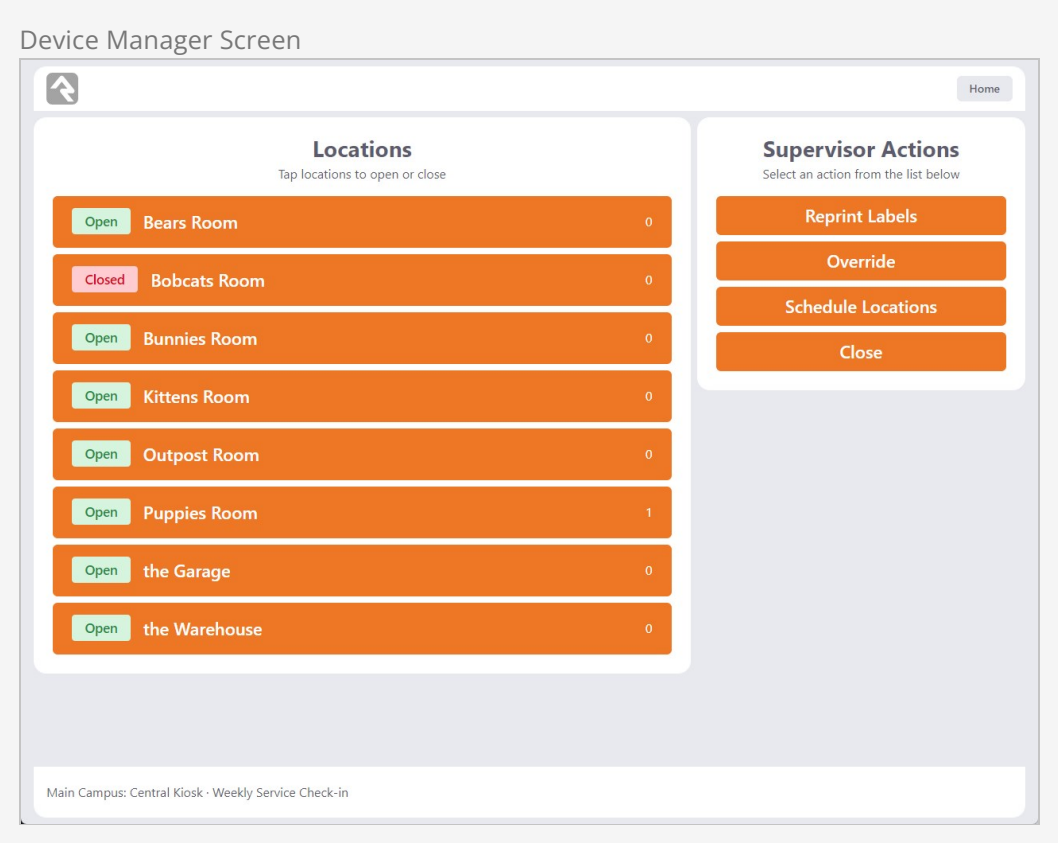
We've all worked with that one volunteer or staff member whose ability to tear off the labels from the printer might not be, shall we say, their calling in life. Okay, maybe it's you...so you have a torn name tag, and we can come up with many reasons why that is an issue. Possibly you can't read a child's name, or the security pick up code is not legible. Either way, you need a solution, and we have just the thing. That's right: label reprinting.

There are two ways to reprint labels. One is through the check-in kiosk device manager (accessed by clicking the gear on the check-in Welcome page), and the other is in Check-in Manager. We will walk through both and show how to enable this option.

> #### Restrictions on Reprinting
> Due to web browser restrictions, Check-in Manager reprinting only works with server printing, while Kiosk Device reprinting works with either server or device printing. Reprinting is not available for mobile check-ins.

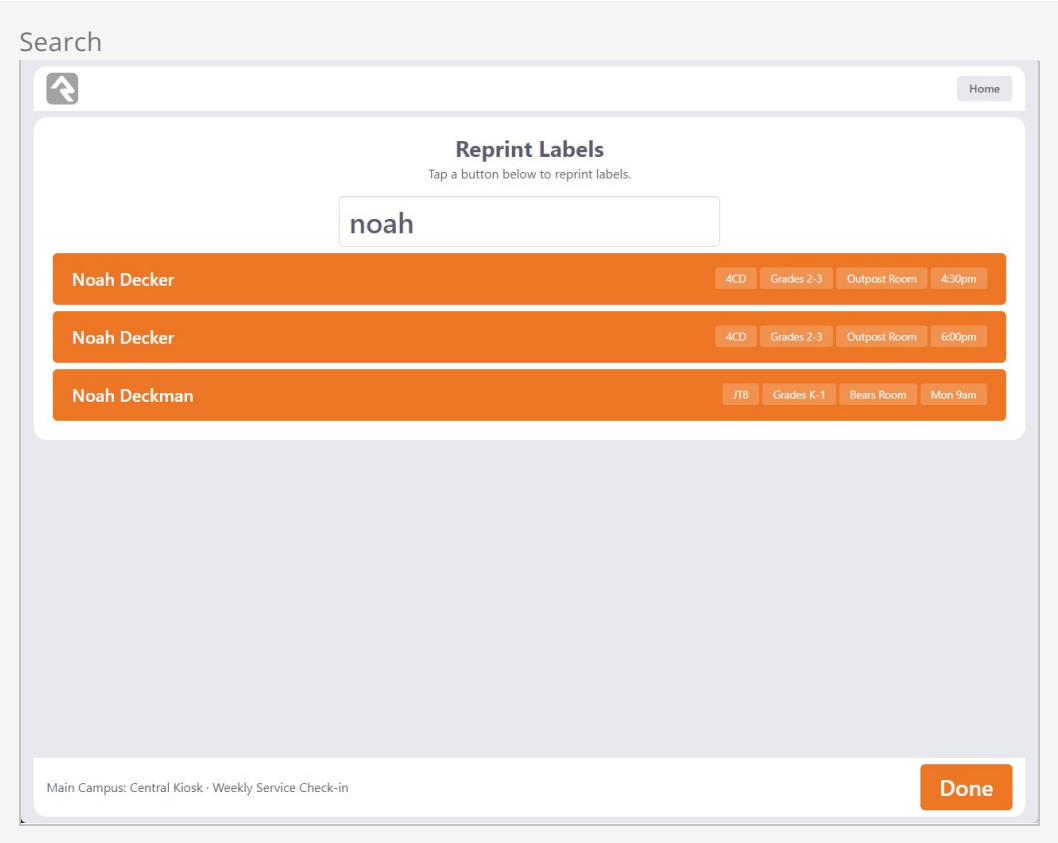
# Check-In Kiosk Device Manager

After logging into the Check-In Kiosk Device Manager with a PIN, you'll see a *Reprint Labels* button.




Clicking on *Reprint Labels* takes you to a screen to filter by the person's name.

In some cases, you might get more than one result. Simply click on the desired name to reprint.



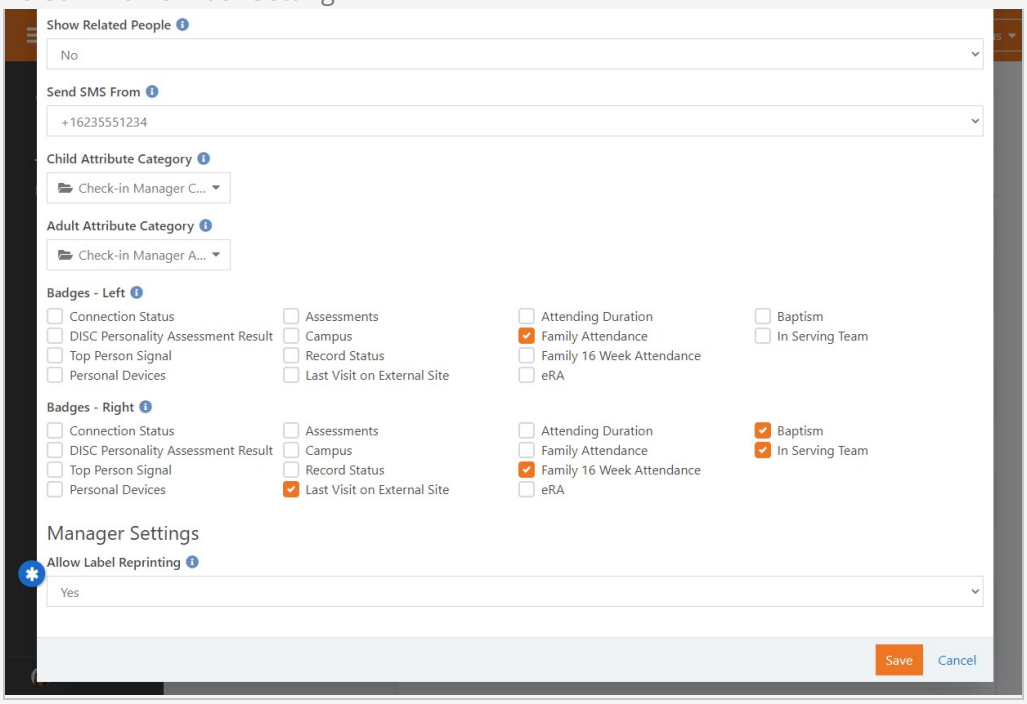

Check out the Device Manager section of this guide for additional kiosk device manager information.

# Check-In Manager

Now let's take a look at using Rock's convenient and oh-so-mobile-friendly Check-in Manager option.

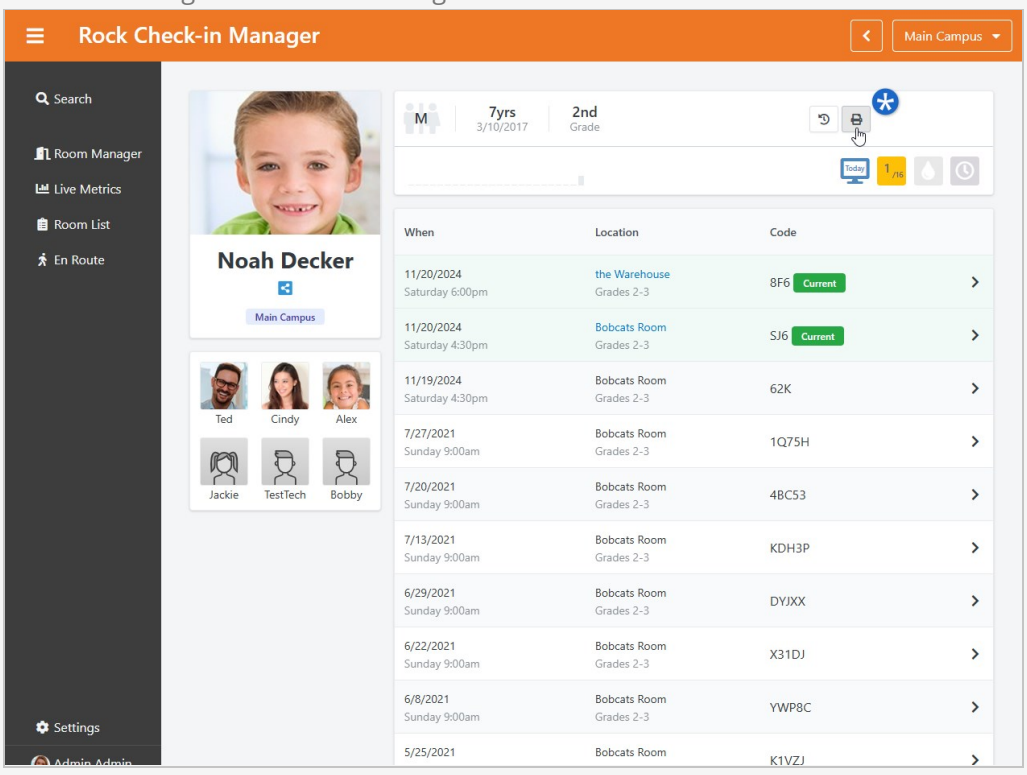
Reprinting is not enabled by default for the Check-In Manager. You'll need to enable *Allow Label Reprinting* from the Check-In Manager Person Profile page, Person Profile block setting, located at `CMS Configuration > Pages > Check-in Manager > Person Profile`. After enabling, you'll see a reprint button on the Check-In Manager person profile screen.

Person Profile Block Setting




With the above setting enabled, you'll now see the reprint button on the person profile as shown below.

Check-In Manager Person Profile Page




When you click the *Print* button, a popup will appear to let you know if/when the labels

were printed.

Check out the Check-in Manager section of this guide for additional Check-in Manager information.

## Label Cutting

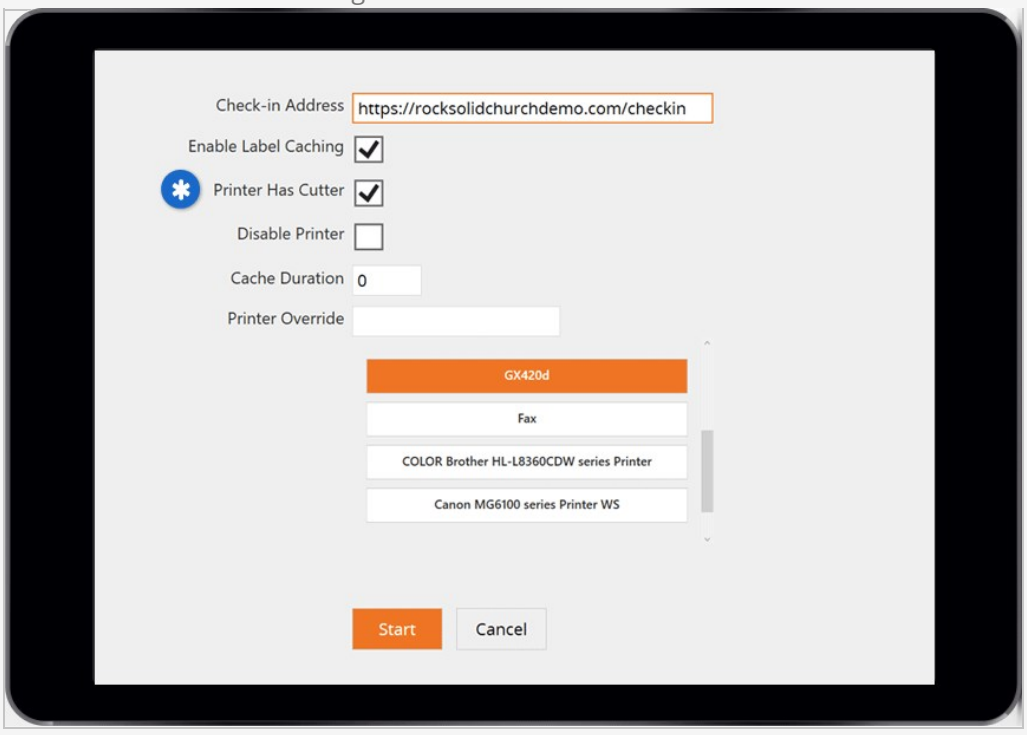
You can easily configure your cutter-enabled label printer to automatically cut at the end of the set of labels. So, if there are a set of three kids checking in, it will automatically cut once after all labels for each child have been printed. As you'll see later, you can take this to the next level and control cutting to a great extent.

> ### Printers with Cutters
> If you're in the market for a label printer with a cutter, see the Printers chapter below for some models we recommend.

Enabling automatic cutting is easy. All you have to do is let Rock know that your printer has a cutter. There are different ways to configure this depending on what you use for check-in. Automatic cutting works with the latest versions of the iPad and Windows Client apps and can also be used with server-side printing.

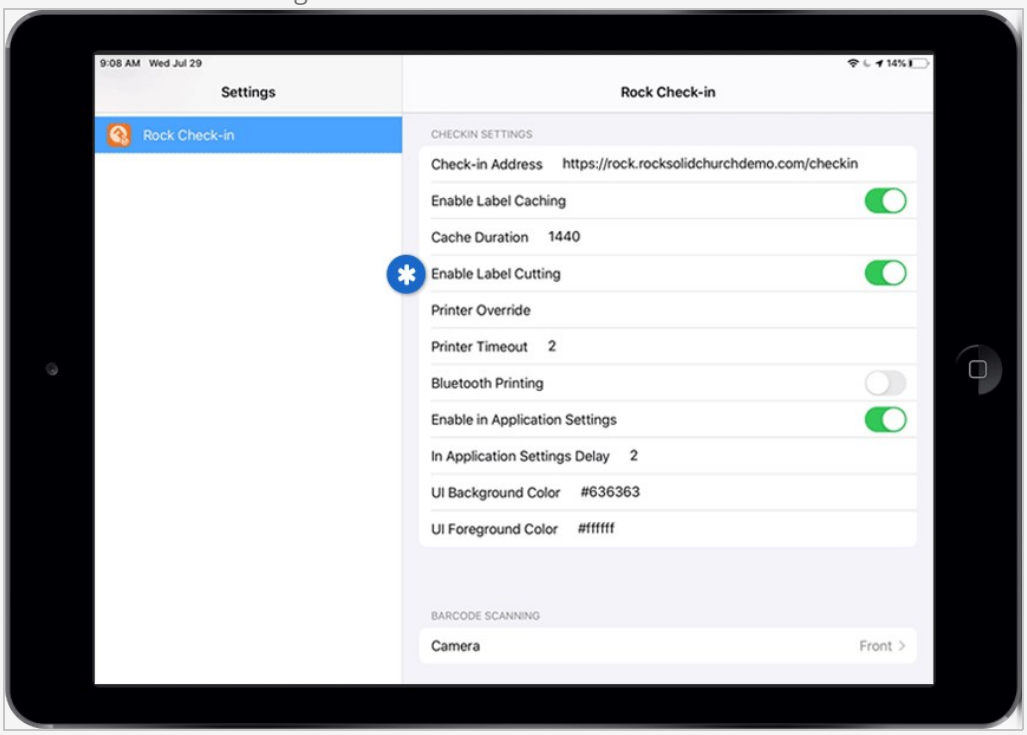
If you're using the Windows app, simply enable the *Printer Has Cutter* option in the app settings.

Enable Windows Label Cutting



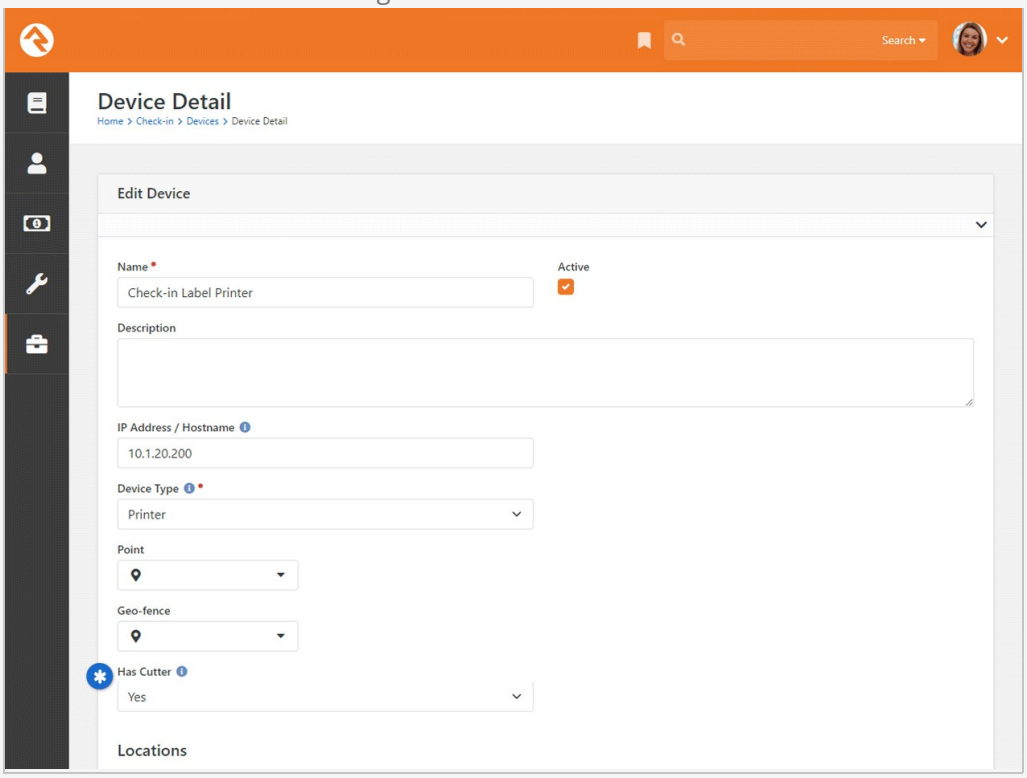

For the iPad application, you'll need *Enable Label Cutting* turned on. To do this, go to *Settings* on your iPad and access the *Rock Check-in* application settings.

Enable iPad Label Cutting




If you're set up for server-side printing, you'll use the *Has Cutter* option in the Check-in Device configuration. In Rock, navigate to `Admin Tools > Check-in > Devices` and select your label printing Device.

Enable Server Side Label Cutting



### One Cut Per Person, Not Per Label

Want one clean cut after each person's labels? Just switch both settings to *On*:

*Has Cutter* — tells Rock your printer has a cutter ( `Admin Tools > Check-in > Devices` then choose your printer).

*Enable Label Cutting* — tells the Check-in app to bundle each person's labels into one print job.

If *Has Cutter* is *Off*, nothing cuts. If *Enable Label Cutting* is *Off*, the printer snips after every label. Flip them both *On* for a smooth cut between each person's label, even if there are many labels per person.

# Rock Cloud Printing

One of the most important parts of check-in is label printing. When labels print without a hitch, your check-in experience stays as fast and easy as it should be. But if your Rock server lives in the cloud, a firewall might keep your server from connecting directly to your label printer. That's where Cloud Printing steps in! With Cloud Printing, your labels print directly from the server, keeping check-in smooth and frustration-free, no matter where your server is hosted.

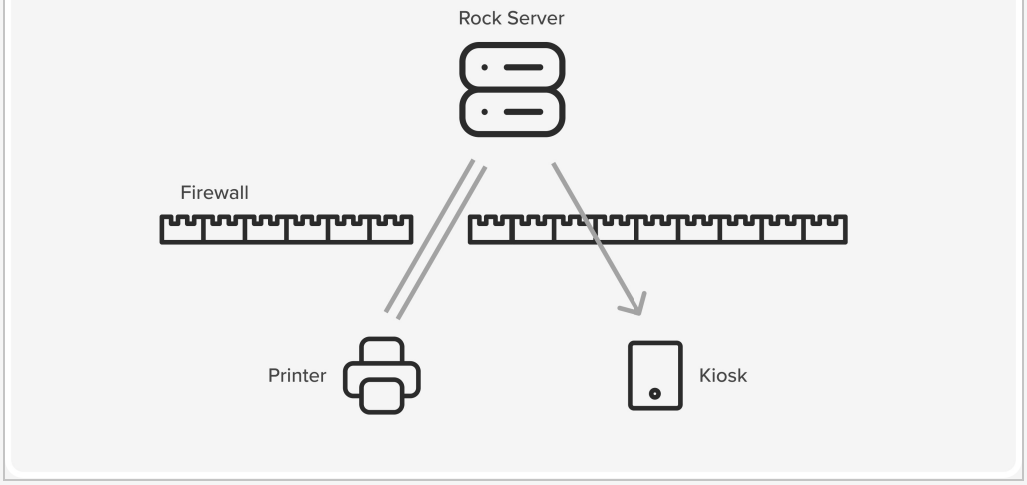
## Options for Printing Labels

Before we dive into Rock's Cloud Printing solution, let's look at all the options you have available.

### VPN Tunnel

One way to get around the firewall is by using a VPN tunnel. This would open a secure pathway between your printer and your server, which would enable the server to print straight to the printer.

VPN Tunnel Printing




While this method allows communication through the firewall, it has several downsides:

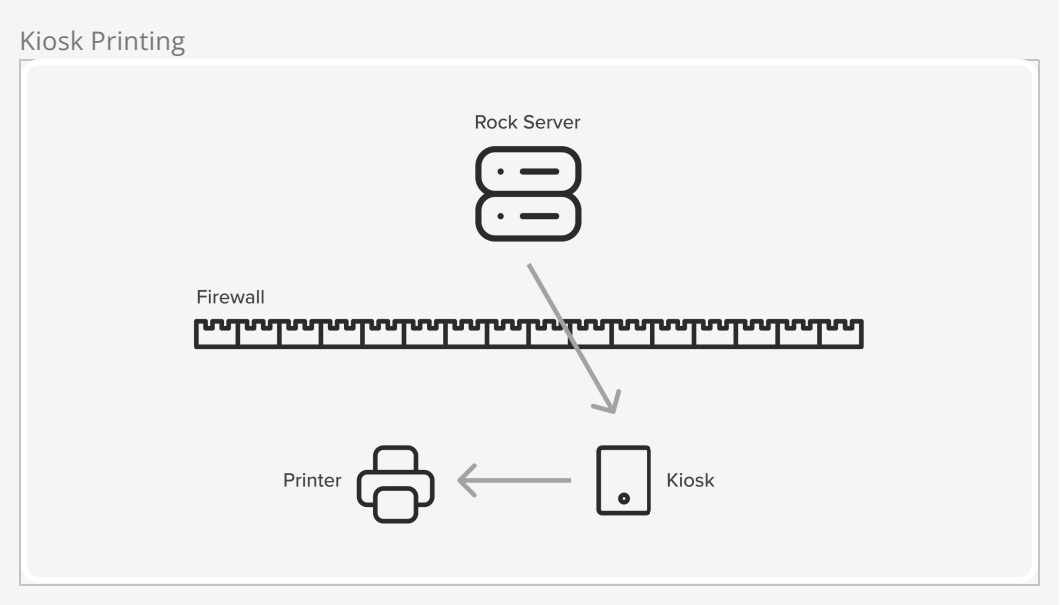
- **Complex Setup:** VPN tunnels can be difficult to configure, requiring technical expertise.
- **Reliability Issues:** They can be prone to interruptions, which can cause delays in

printing.

- **Cost:** VPN services can be expensive, especially when factoring in ongoing maintenance.
- **Security Risks:** VPN tunnels, while secure, can introduce vulnerabilities if not properly managed.
- **Maintenance:** Regular upkeep and troubleshooting are often required.
- **Possible Delays:** Printing may take longer, which isn't ideal during busy check-in times.

### Kiosk Printing

Another option is printing directly from the kiosk. This method allows you to print labels without needing to connect the printer to your Rock server.

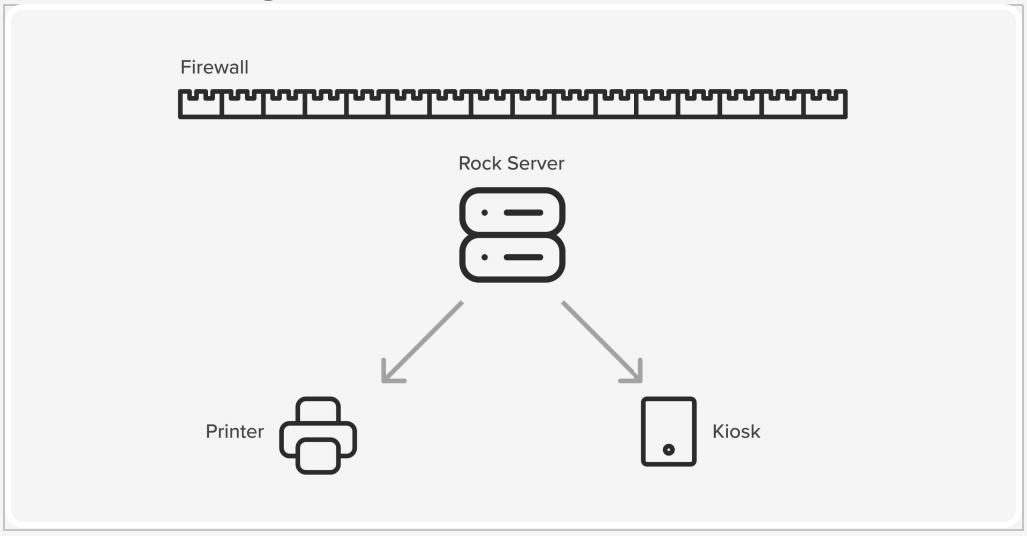



While this is a valid and simple solution, it also comes with limitations. You need to download special kiosk software for kiosk printing to work.

### Local Network Printing

If your Rock server is locally hosted (i.e., not in the cloud), you can print labels easily because your server and printer are on the same network.

Local Network Printing



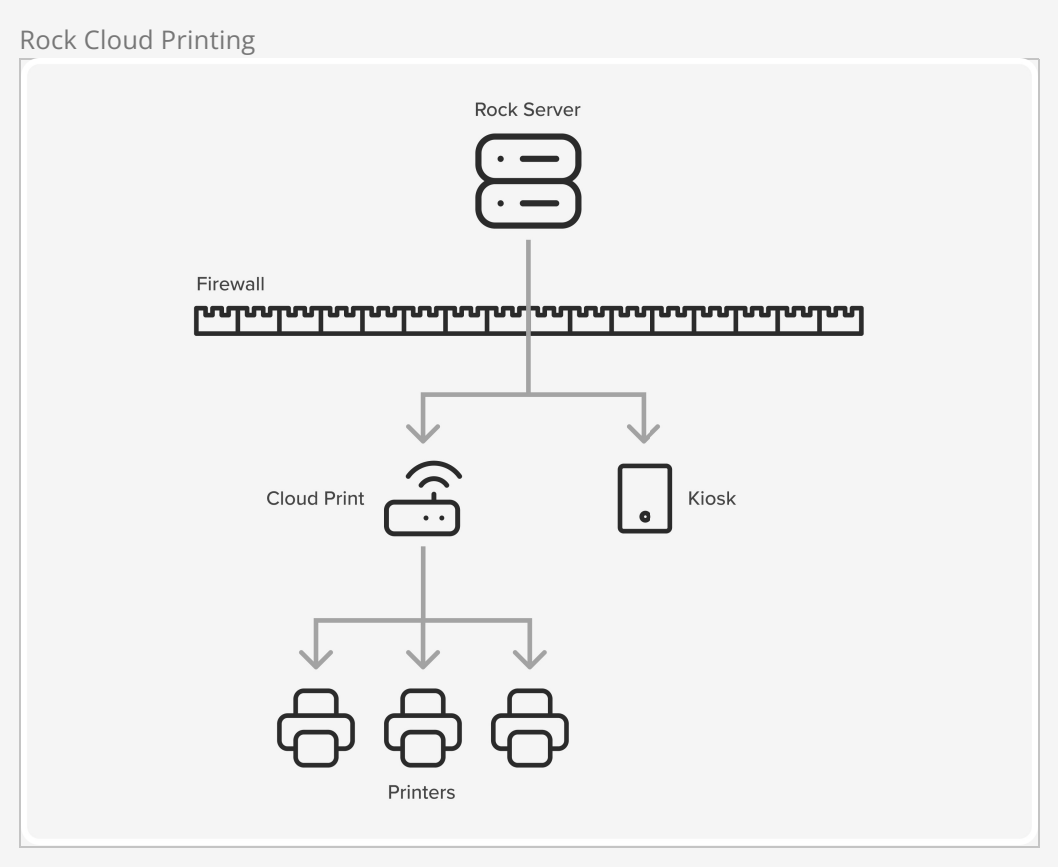

This is another straightforward and easily configured method. However, this approach has its own challenges.

- **Difficult Scaling:** As your organization grows, scaling a local network setup can be expensive and complicated.
- **IT Requirements:** Running a local network may require dedicated IT staff for maintenance, backups, and support.
- **Physical Risks:** Local servers are more vulnerable to physical damage, like natural disasters or power outages.
- **Bandwidth:** Your server's connection to the internet is limited to your local provider's connection to your building.

### Cloud Printing: A Better Solution

Now that you've seen the challenges of other options, here's the good news: Rock Cloud Printing makes label printing much simpler and more reliable. With Cloud Printing, you don't have to worry about complex networking setups or direct communication between your server and printers. It's all managed for you through a *proxy device* and a *proxy service*, two components we'll introduce here.

Let's start with the *proxy device*. This is a physical device that handles communication between your Rock server and the printers on your internal network, bypassing any need for direct access to your local IP addresses, as pictured below. The proxy device can be any Windows check-in device you already have, or a small, dedicated computer like an Intel NUC. We recommend a dedicated device. Remember, you can always start small with a single device and scale up as needed, adding more based on performance requirements or redundancy goals.




Now, what about the *proxy service*? The *proxy service* is a small program running on your *proxy device* that keeps an open line of communication with your Rock server. Think of it like a web browser. When you visit a page, your browser opens a connection to the website. But unlike a typical browser, the proxy service keeps this connection open continuously. This persistent connection allows the server to send commands to the proxy device in real time. Commands like “please print this label on Printer A.”

The *proxy device* then relays the command to the printer(s) on your local network. For example, Rock might send a message to the *proxy service* saying, “please print this label on Printer A.” Since the *proxy service* is on your local network, it can reach Printer A, send over the label data, and voilà—your label prints without any direct connection between Rock and your internal printer network.

That's a lot of "proxy" talk. It's not critical that you distinguish between *proxy device* and *proxy service*. Going forward, we'll simply refer to them both as *Cloud Print Proxy*.

### Why Cloud Printing Is a Game-Changer

With Cloud Printing, you can say goodbye to complex network configurations. Since the Cloud Print Proxy takes care of all communication, there’s no need for extra VPNs or complicated setups. This feature is flexible and grows with you—one Cloud Print Proxy can handle multiple printers, making it a breeze to expand as your needs increase. And here’s the cherry on top: for larger organizations, adding multiple Cloud Print Proxies builds in a layer of reliability, so if one device goes offline, another jumps right in to keep check-in running without a hitch.

### How Many Cloud Print Proxies Do I Need?

If you're running a smaller campus with just a few check-in printers, a single Cloud Print Proxy will do the job. But realize that if this device goes down you'll no longer be able to print.

For a larger campus with, say, 30 check-in printers, things are a little different. More printers mean more people checking in, which means lots of labels. If the Cloud Print Proxy goes offline in this scenario, all 30 printers stop printing—a much bigger hassle for your staff and volunteers! This is why it's helpful to have multiple Cloud Print Proxies.

With multiple Cloud Print Proxies running, one can pick up the load if another goes down. Rock automatically balances the load across all active instances, so no single proxy has to handle everything on its own.

In environments with multiple Rock servers (i.e., a Web Farm setup), Cloud Print Proxies can connect to different servers to create redundancy across the whole setup. If one Rock server fails, Cloud Print Proxies connected to other servers will seamlessly keep things running.

So, how many Cloud Print Proxies should you have? There's no one-size-fits-all answer; it's a balance of cost and risk. The cost includes any extra hardware and time to maintain it. The risk is the potential disruption in label printing if a Cloud Print Proxy fails. For a small campus, probably not much of a problem. The traffic is probably such that you can just handwrite labels quickly. A larger campus might not have that option, so may want to invest in multiple Cloud Print Proxies.

### Setting Up Rock Cloud Printing

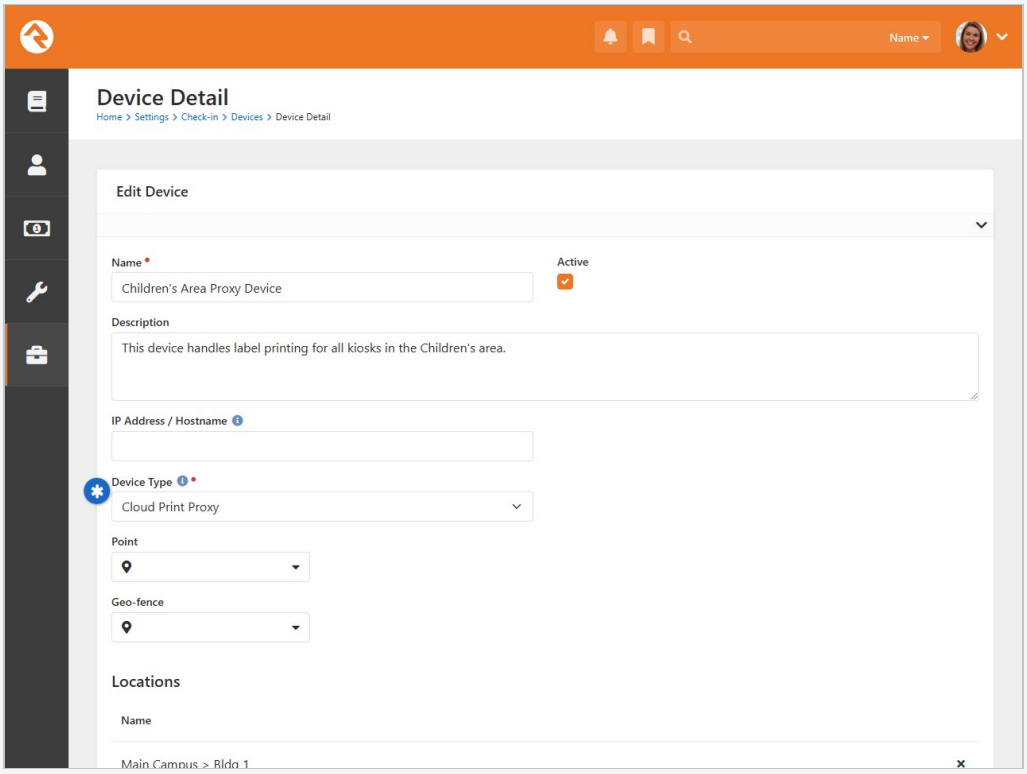
> #### Ensure WebSockets Are Enabled
>
> Be sure to review your IIS server configuration if it's been a while. *WebSockets* must be enabled for *Rock Cloud Print* to function. The `Internal Hosting` guide explains exactly how to configure this. If you're using a *Rock Cloud* server, WebSockets are already enabled for you.

Ready to set up Cloud Printing? Here's how to get everything up and running.

To set up Cloud Printing in Rock, you'll need to add a Cloud Print Proxy for each campus or network. Multiple instances of a single Cloud Print Proxy can run on different PCs for load balancing and failover, but you only need one Cloud Print Proxy in Rock per network. For example, if you have three campuses, you'll need three Cloud Print Proxies in Rock—one for each network—even if each campus has multiple PCs running Cloud Print Proxies.

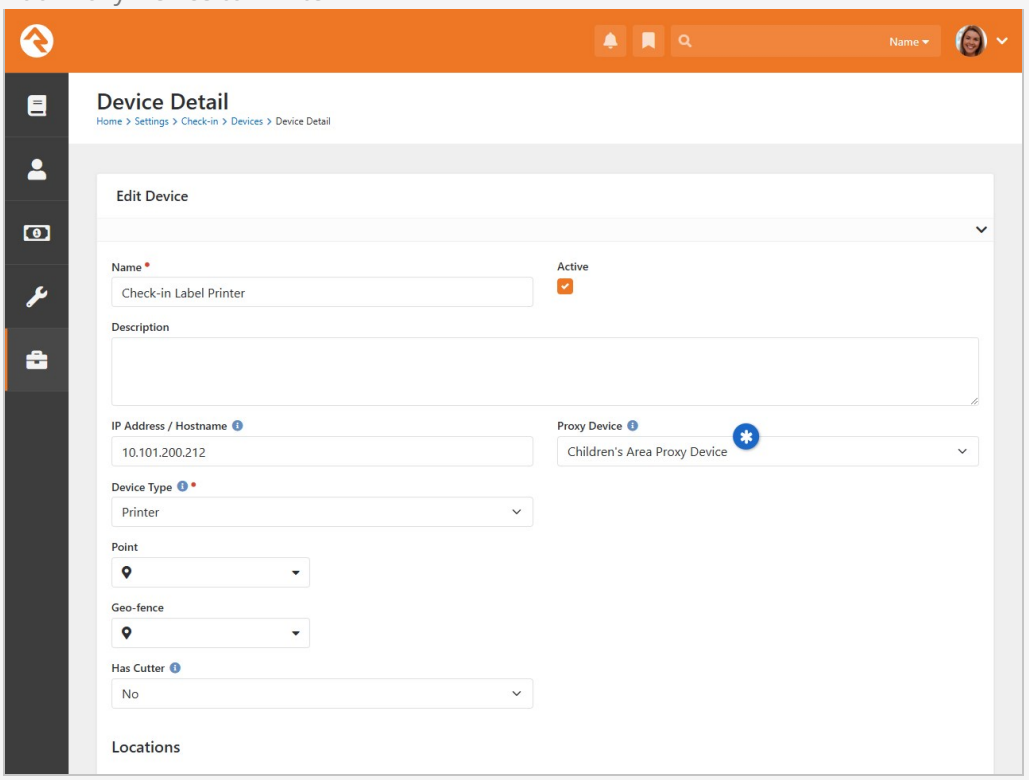
To add a new Cloud Print Proxy to Rock, go to `Admin Tools > Settings > Check-in > Devices`. There, create a new device and set the Device Type to "Cloud Print Proxy." Note, you don't need to specify an IP address; the Cloud Print Proxy will report its own address to the server.

Set Up Proxy Device



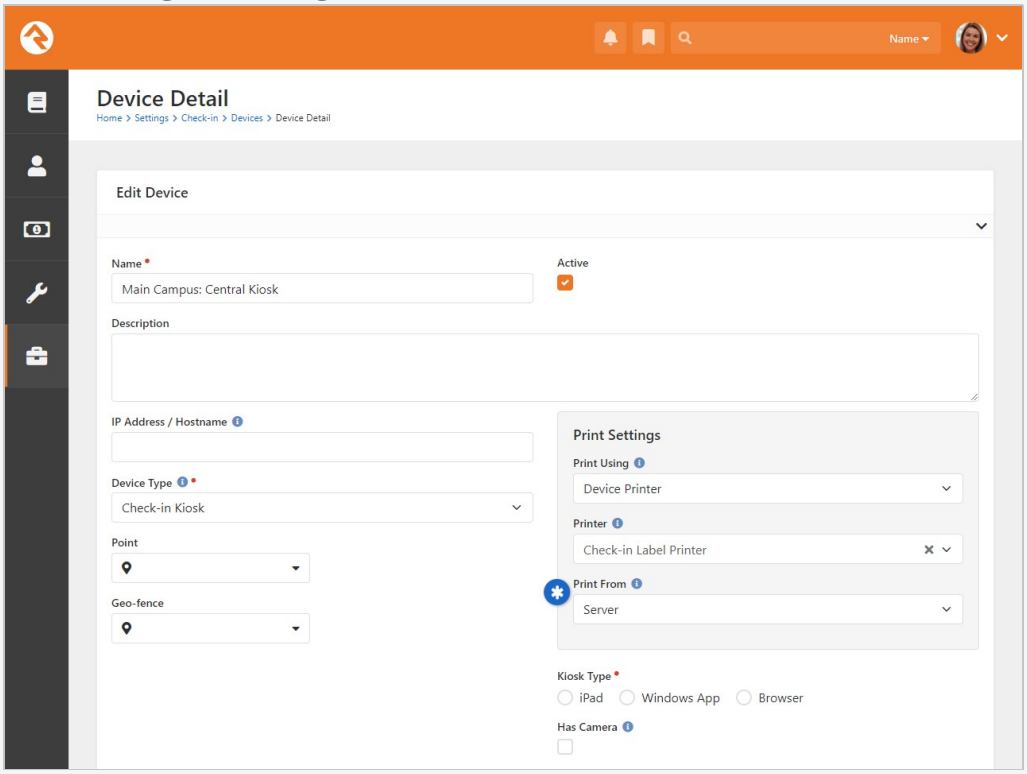

Next, update each printer you'll be routing through the proxy. Find the proxy device setting in the printer's configuration and set it to the proxy device you just created. This lets Rock route printing tasks through the proxy for seamless communication with your printers.

Add Proxy Device to Printer




Finally, confirm that your kiosk configuration is set to use *Server* printing instead of *Client* printing. This ensures that all printing requests are handled by the server through the proxy device.

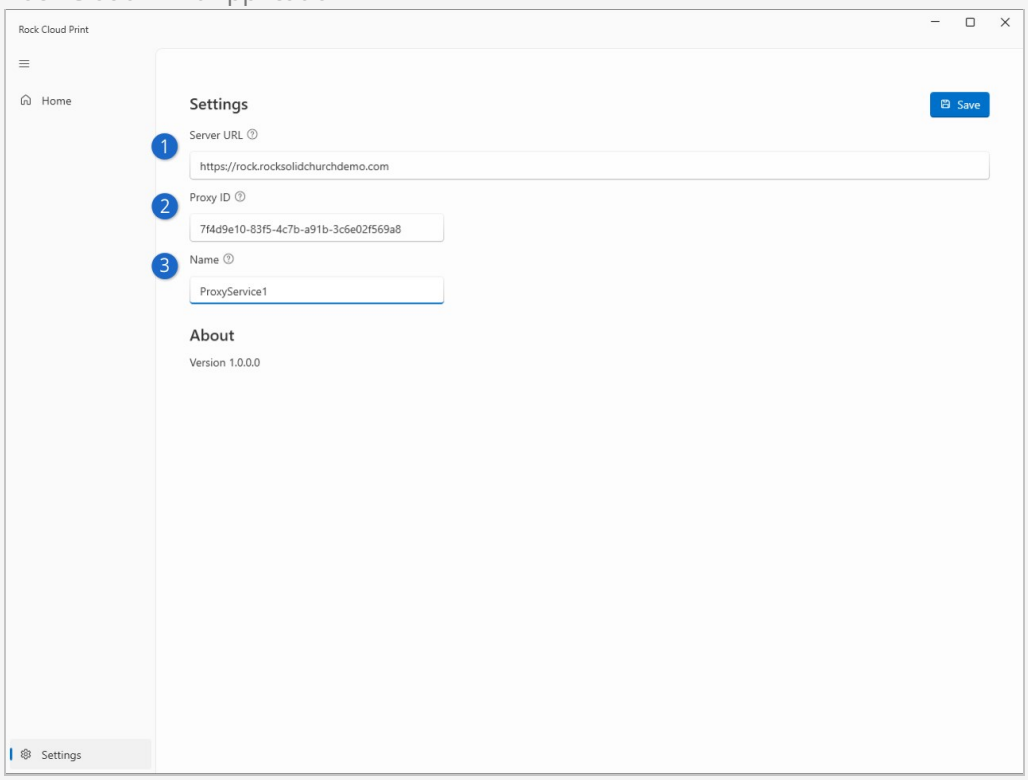
Cloud Printing Kiosk Configuration




## Setting Up the Cloud Print Proxy

To set up the Rock Cloud Print application on the Windows machine you'll use as the proxy, start by downloading the installer from `Admin Tools > Settings > Power Tools > External Applications` in Rock. Run the installer, and once it completes, you'll find the Rock Cloud Print application in your Start Menu, within the Spark Development Network folder. Open it, select Settings, and complete the information shown below.

Rock Cloud Print Application




1. **Server URL**
   Enter your server's URL, making sure it points directly to your Rock instance and bypasses any CDN that might be configured for your public-facing site. The Cloud Print Proxy requires direct access to Rock to function properly.
2. **Proxy ID**
   Add the Proxy ID, which can be either the GUID or IdKey of the proxy device you created in Rock. You can find these values on the device's detail screen under the Audit panel.
3. **Name**
   Finally, choose a name for the Cloud Print Proxy. It’s helpful to make this name descriptive, especially if you plan to use multiple proxies. The name will be displayed when you check the status of your connected proxies, making it easier to identify each service.

After saving these settings, navigate back to the Home tab to monitor the connection. It may take a minute or two for everything to sync.

Once you confirm the proxy is connected, you can close the Rock Cloud Print application. The Proxy Service will run in the background and automatically start with Windows, so there’s no need to reopen the app unless you need to change configurations.

# Allergies and Legal Notes

Watching over someone else's child is a big responsibility and knowing specific details about a child's allergies or legal situations is especially important. Rock lets you easily store these details in a child's record and have them displayed at check-in. Here's how.

## Setting Allergy and Legal Notes

To set an allergy or legal note on a child's record, first bring up their *Person Profile* page in Rock and click on the *Extended Attributes* tab. There you will see a section of attributes labeled *Childhood Information*. Click the ✎ icon to edit the values for allergies and legal attributes.

> ### Note To Self
>
> The text you enter for these attributes will print on the child's note label (see below), so keep the message short and appropriate for volunteers to view. If you get carried away, Rock will automatically truncate it to a reasonable length when printed.

## Viewing Notes at Check-In

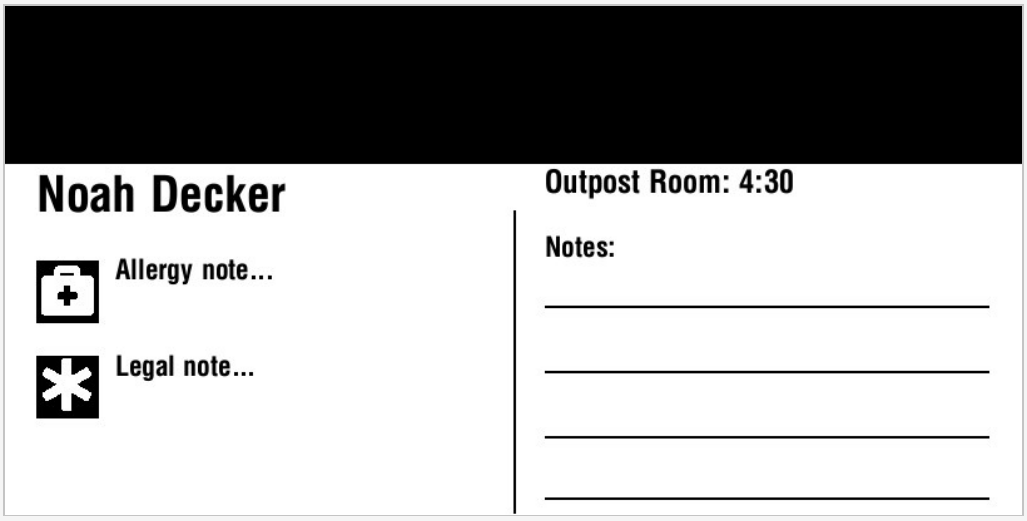
The notes you enter above will be printed at check-in in two ways.

On the *Child Label* you'll see a notation that the child has an allergy or legal note in the system. This label will be worn by the child and does not show the details of the allergy or legal note, for privacy reasons.

Child Label


The note label will print the complete note entered above for the benefit of the volunteer assisting with child check-in.

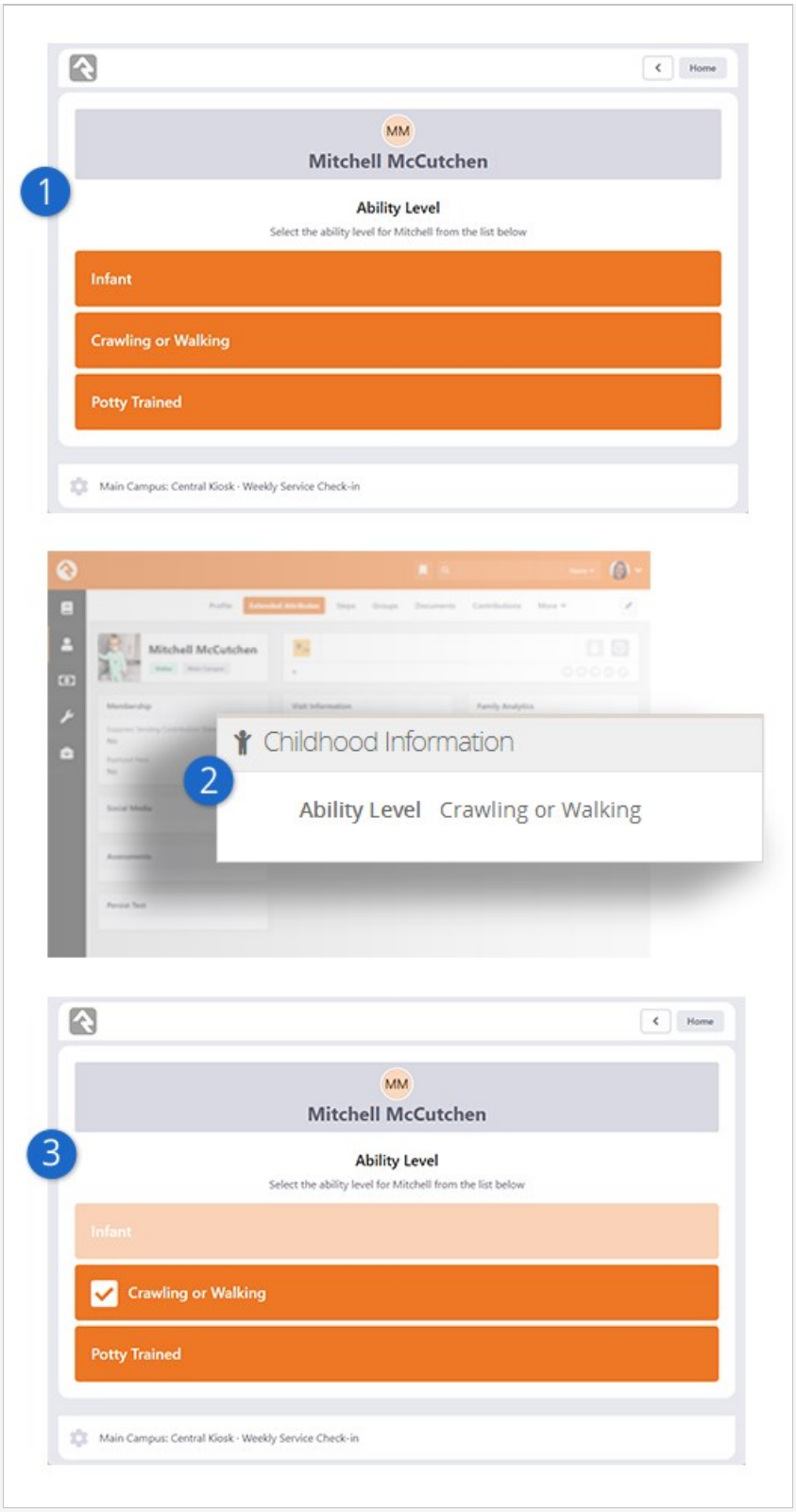
Note Label



# Ability Levels

We've already seen that you can filter groups by age ranges and grades. There's one more criterion you can use: ability levels. It's common for infants and preschoolers to stay in certain rooms until they achieve a special milestone activity such as crawling or potty-training. Rock can help you track and select these levels within the check-in process. Let’s see how it works.

Ability Level Walkthrough




1 **Initial Level Set**
The first time a child who matches the age range of ability levels checks in they will be asked which ability-level they meet.

2 **Ability Level Set**
When the parent selects the ability level for their child it will be stored in the *Ability Level* person attribute on their *Person Profile*. Feel free to

update their level here if needed in the future.

3. **Subsequent Check-Ins**
   Future check-ins will display their current ability and fade out previous levels. Parents can update the setting at any time. They can even select from the previous levels if needed.

## How Ability Levels Are Stored

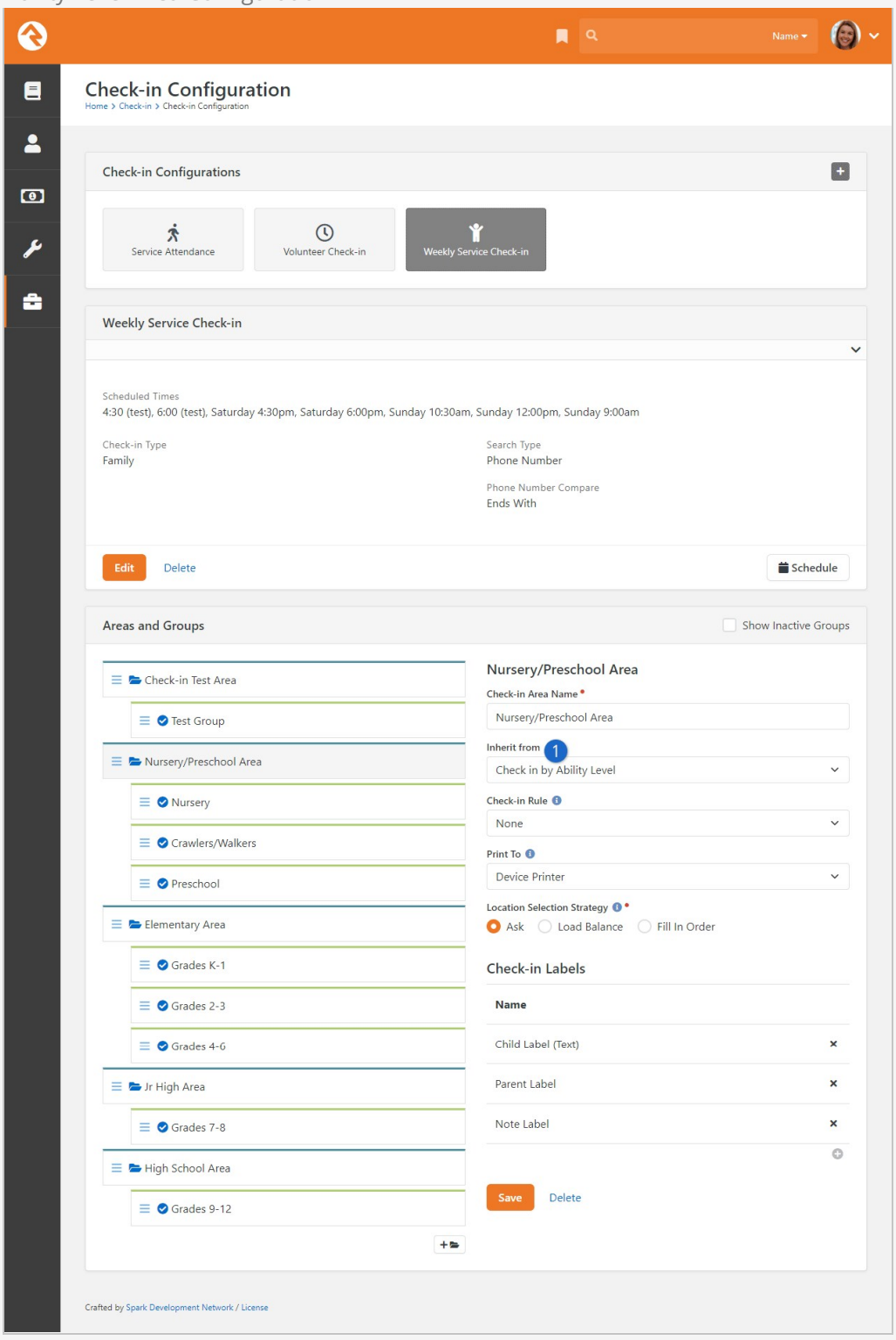
Ability levels are simply a person attribute that can be used as a filter to select a check-in group. If you go to the *Extended Attributes* tab of a *Person Profile* page, you'll see the *Ability Level* attribute in the *Childhood Information* section. This is the attribute that will be considered when filtering groups. Rock comes with three ability levels configured: Infant, Crawling or Walking and Potty-Trained. You saw in the walkthrough above that an individual, or more likely their parents, could update this ability level during each check-in. You can also change the ability level behind the scenes on the *Person Profile* page.

## Configuring Ability Levels

Not all check-in groups care about ability levels. Once you leave the preschool area, they aren't that useful. (Imagine the responses you'd get if you asked high school students if they were potty-trained!) To enable ability levels, first you need to set your check-in area (the default configuration is *Nursery*) to inherit from *Check-in by Ability Level* under `Admin Tools > Check-in > Check-in Configuration > Areas and Groups`. This will tell all the groups in this area that they can define an ability level.

A key to ability levels is that you need to configure groups with overlapping age ranges. A child will only be able to check into the groups whose age criterion she meets, even though the parent will be presented with a list of all ability levels.

Ability Level Area Configuration

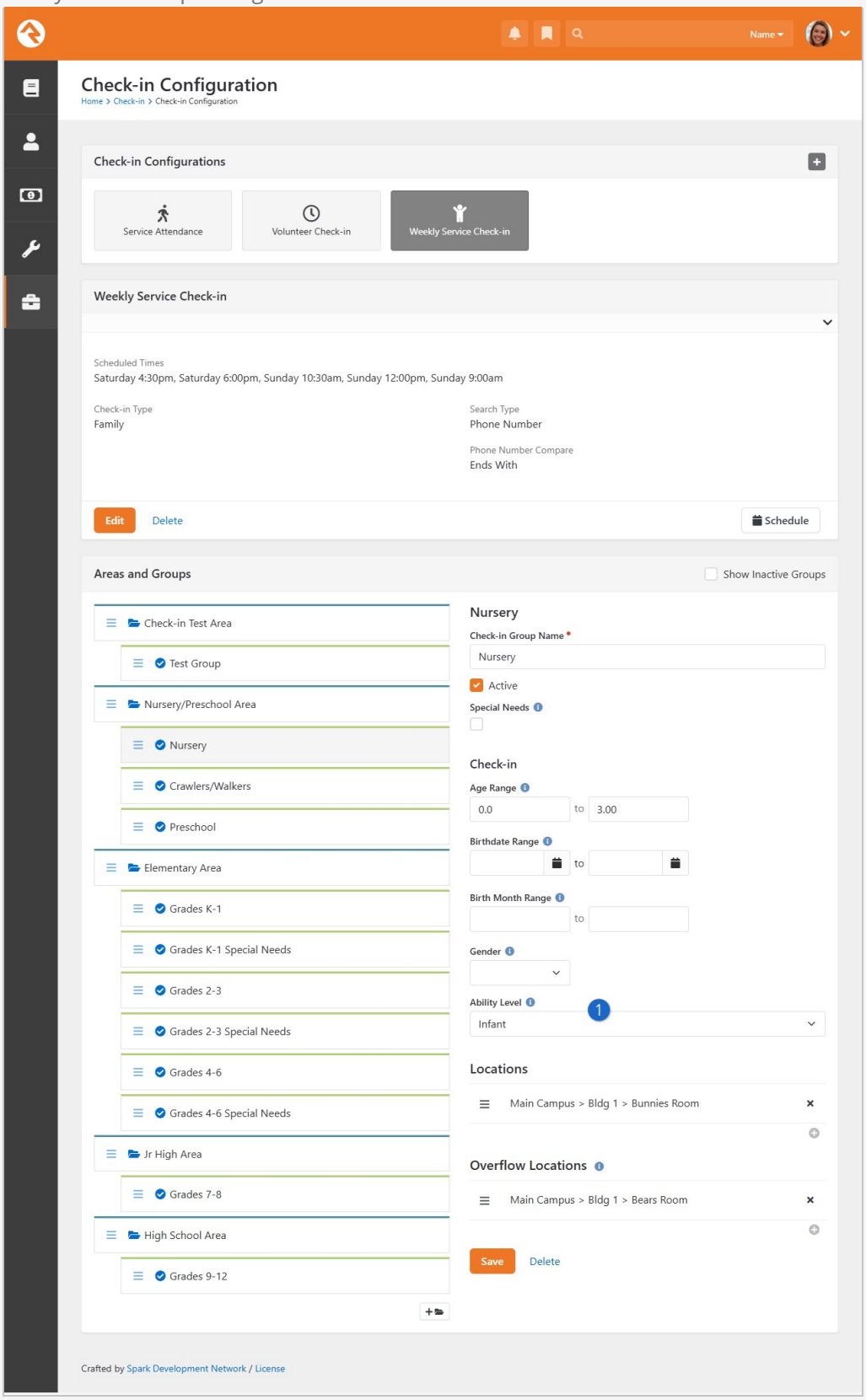



1 **Inherit From**
Set the group's *Inherit From* property to *Ability Level* to enable the check-in for ability levels.

Once an area has been configured to inherit from *Check-in by Ability Level*, you'll see

that the groups assigned to that area now have an *Ability Level* setting.

Ability Level Group Configuration




1 **Ability Level**

Select the group's ability level. This will be the filter that is used to present options to the individual during check-in.

## When Ability Levels Are Shown

Due to the potential awkwardness of the ability level selection with older children you might be wondering when the selection screen is shown. This screen is only shown when the following criteria are met:

1. The kiosk is configured to check-in for an area that inherits from *Check-in Ability Levels*.
2. The individual being checked in matches the age ranges of the groups with ability levels.

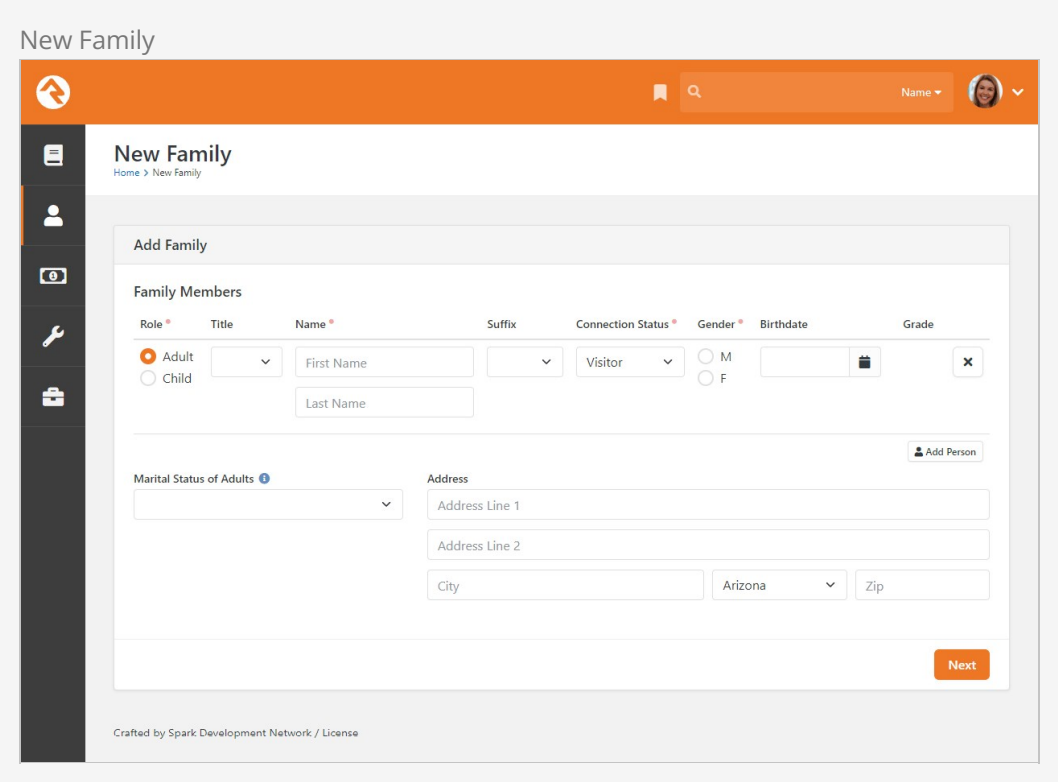
## Adding Ability Levels

Adding additional ability levels is a simple process. But you should refrain from adding too many levels because it can confuse your guests. To edit or add levels simply edit the *Ability Level* Defined Type `Admin Tools > Check-in > Ability Levels`.

> **Note**
> The order of the levels is very important. The order that they are shown in the Defined Type is the order they will be displayed on the check-in screens.

# First Time Registration

When new people show up for the first time, you'll need to enter them into the system before they can check in. The best way to enter these families is under `People > New Family`.




If you are using a paper registration card and entering the data into the system, keep in mind you don't need to enter all of the data right away. You only need to enter these six key points to get started:

- Parents' names
- Children's names
- Children's birth dates
- Children's grades (if in grade school)
- Phone numbers
- Allergies and legal notes

You can enter other contact information like addresses and emails later. This really helps speed up the registration process for first time guests.

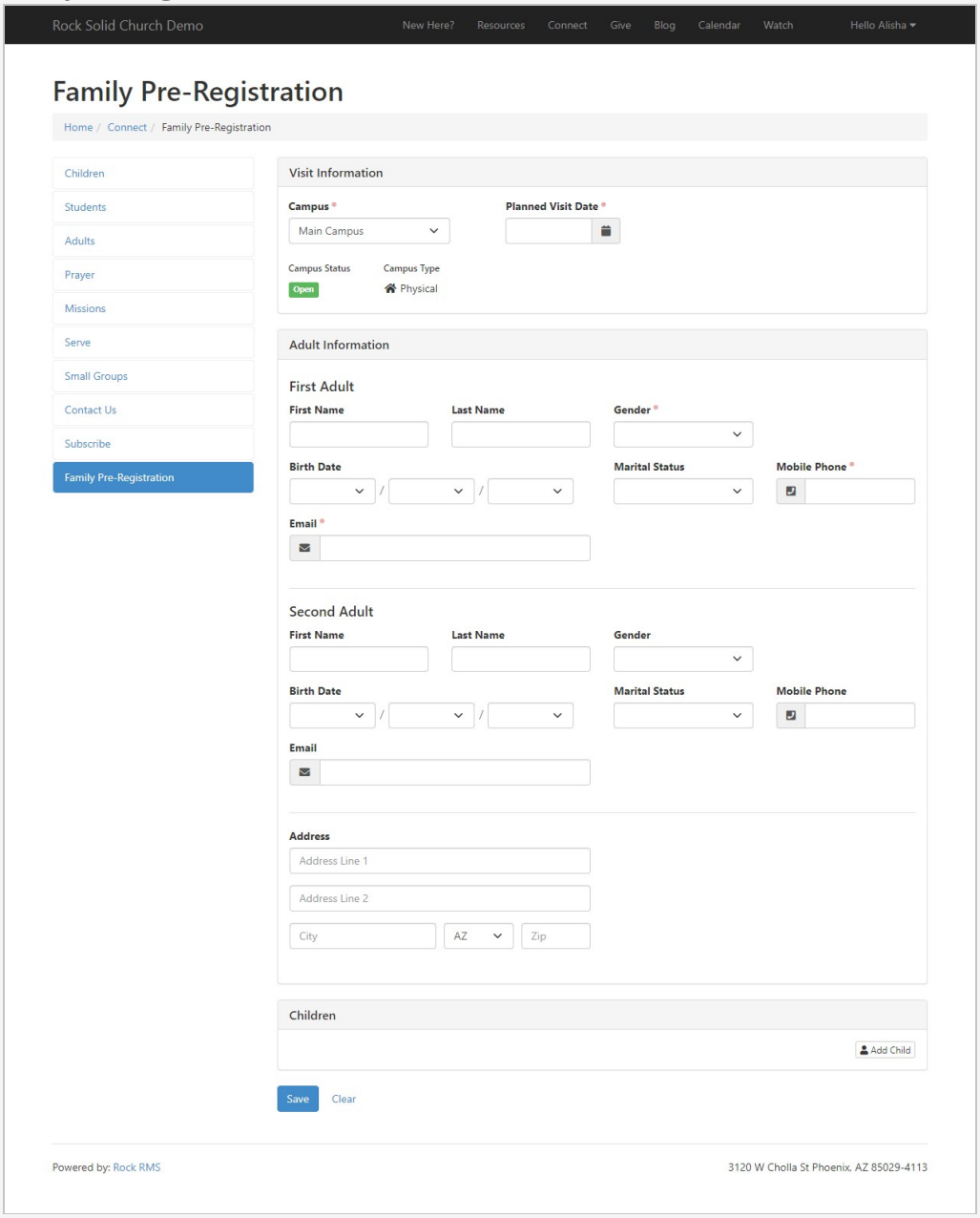
> **Important**
>
> It's critical that you enter a child's birthdate before the family attempts to check in. Without a birthdate none of the age filters will work. Also, if you've configured your check-in groups to filter on grade, it's highly recommended that you enter those right away. If you don't, it will fall back to using age, but the grade is usually a better (read: narrower) filter.

> **Self-Service Coming Soon**
>
> The *New Family* screen does not allow you to enter some fields, like allergy/legal notes. This must be done on the *Person Profile* screen. We hope to add specific *registration* screens soon to streamline the entry process and even allow a *self-service* capability. Stay tuned.

## Family Pre-Registration

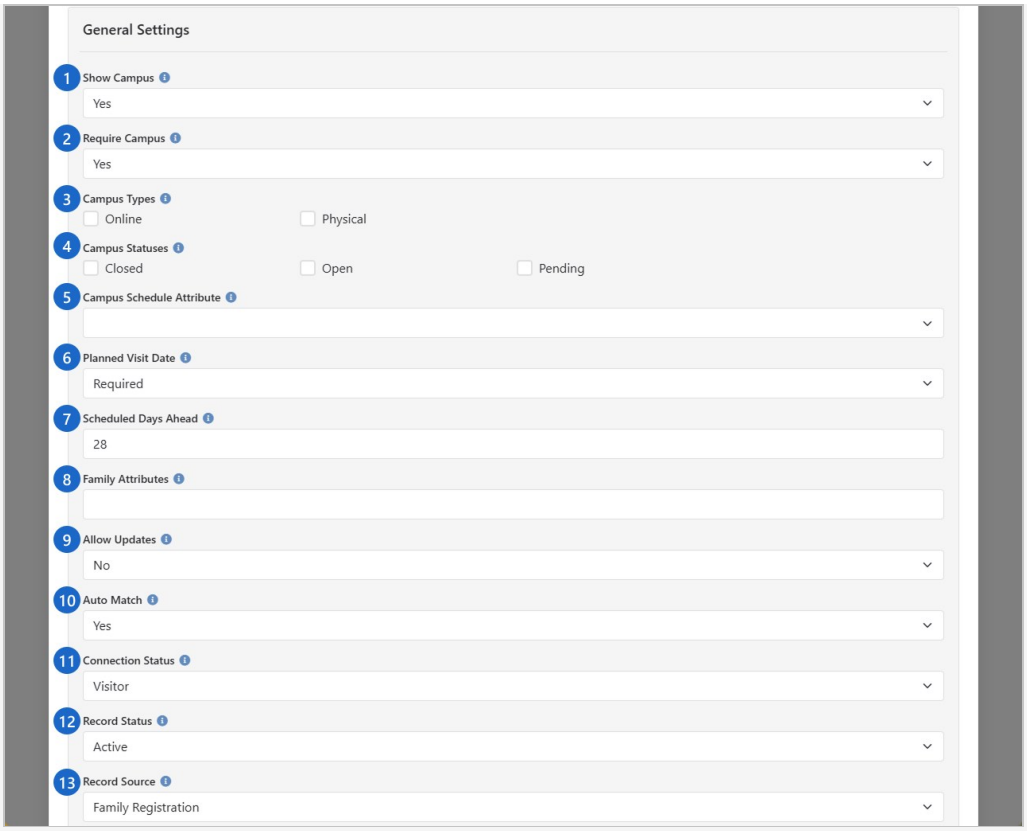
The *Family Pre-Registration* block can be used by families to pre-register before attending a service for the first time. Registering ahead of time makes the check-in process faster and easier. By default, the *Family Pre-Registration* block is included in the external site on the Connect page.

## Family Pre-Registration Screen




You can customize the Family Pre-Registration page by changing the block settings on the external site. There are a lot of settings here, so we're going to break it up into pieces.

## Family Pre-Registration Block Settings




1 **Show Campus**
Select 'Yes' to display the *Campus* selection field.

2 **Default Campus**
If the *Campus* selection field is displayed, you can designate a default campus to be displayed. Alternatively, the campus can be passed to this block (by Id or GUID) using a query string parameter in the URL.

3 **Require Campus**
This setting simply determines whether a campus must be selected.

4 **Campus Type/Status**
You can limit which campuses are available for selection with these filters. For instance, you may only want to show 'Physical' campuses that are 'Open'.

5 **Campus Schedule Attribute**
Here you can provide a campus attribute of type *Schedules* that can be used to set the *Planned Visit Date* and *Planned Visit Time*. See the help text for additional information.

6 **Planned Visit Date**
This field determines how the *Planned Visit Date* field will be displayed. Select 'Hide', 'Optional' or 'Required'. The Planned Visit Date value is not saved anywhere. It is only used if launching a workflow, or it can be used in the Lava to redirect the guest after they are done completing the screen. (Note: If both the *Campus* and *Planned Visit Date* fields are hidden, the entire Visit Information section will not be displayed.)

7 **Scheduled Days Ahead**
If you're using a schedule configured for the campus, this setting limits

how many days ahead the person can select their *Planned Visit Date*. If you're not using a campus schedule, then a date picker will be shown, and this setting does not apply.

8. **Family Attributes**
   Enter any family attributes you want displayed. The attributes will appear to the right of the *Address* field on the *Family Registration* screen. Any attributes that are configured as 'required' will require the guest to provide a value.

9. **Allow Updates**
   Select 'Yes' if you want the block to automatically assume the guest who is logged in is updating information for their own family. If 'Yes' is selected, when a guest is logged in, the current names of each family member will not be editable. If 'No' is selected, the block will automatically assume a new family is being entered, regardless of whether a guest is logged in or not.

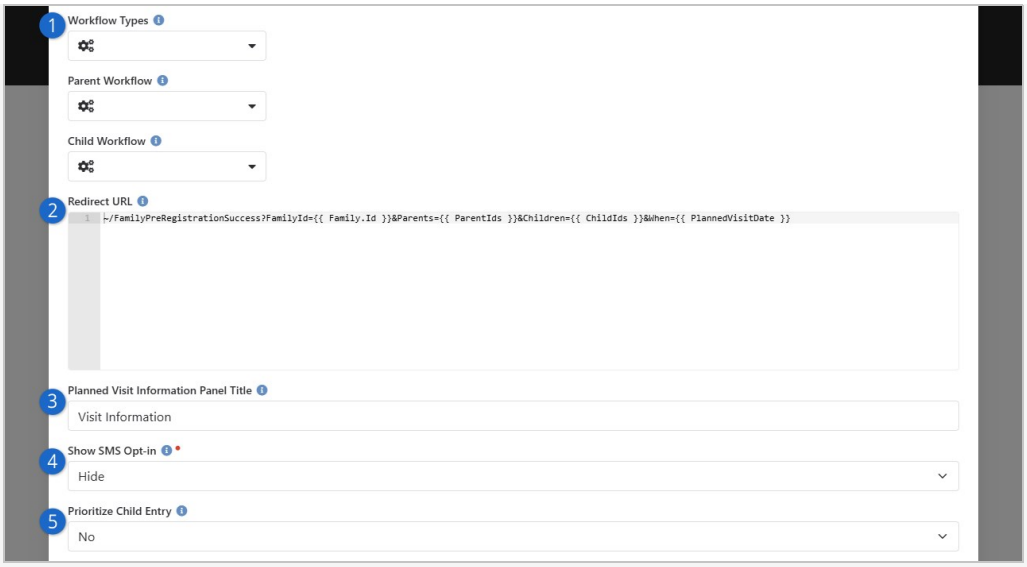
10. **Auto Match**
    Select 'Yes' if you want the block to attempt to find a matching person in Rock when a new adult is being added, rather than creating a new person. Rock will identify a match if one (and only one) person with the same first/last name and email address matches the adult being added. This process is skipped and a new record will be created if the existing record's Account Protection Profile is configured to skip duplicate checking based on your Security Settings.

11. **Connection Status**
    Designate the connection status to use when creating a new person.

12. **Record Status**
    Designate the record status to use when creating a new person.

13. **Record Source**
    Discover where a new individual's info was entered into the system. In this case, select *'Family Registration'* to categorize a new record's origin.

Family Pre-Registration Block Settings




1 **Workflow Types**
Select any optional workflows you want to launch after the guest has entered the information. For any workflows launched, the block will set the entity for the workflow to the family that is being created. It will also try to set any of the following workflow attribute values if they exist on the workflow type:

- ParentIds: A comma-delimited list of the person IDs for each adult
- ChildIds: A comma-delimited list of the person IDs for each child
- PlannedVisitDate: The value entered in the Planned Visit Date field

You can also define a workflow to launch for each parent or each child using the *Parent Workflow* and *Child Workflow* fields.

2 **Redirect URL**
Enter the URL you want to redirect the guest to after they are finished entering the family information. This field supports Lava, and the block will pass the following fields (in addition to common fields):

- Family: The family that is being created, including adults and children
- RelatedChildren: A collection of any children that are not included in the primary family
- ParentIds: A comma-delimited list of the person IDs for each adult
- ChildIds: A comma-delimited list of the person IDs for each child
- PlannedVisitDate: The value entered in the Planned Visit Date field

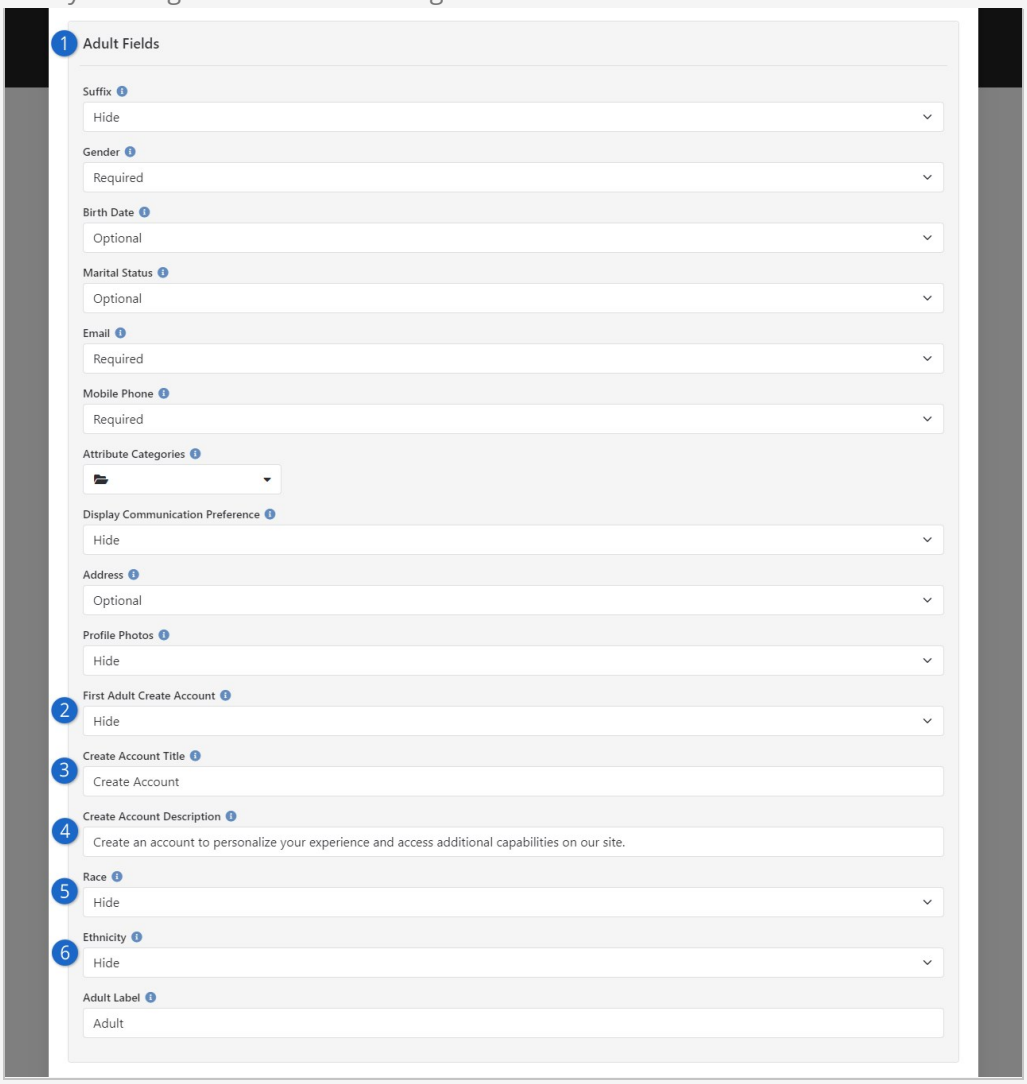
3 **Planned Visit Information Panel Title**
Here you can change the title of the panel that appears at the top of the form, where the person provides their planned visit details.

4 **Show SMS Opt-in**
If the form asks for the person's mobile phone number, this setting lets them grant consent for receiving SMS messages from your organization at that number.

5 **Prioritize Child Entry**
By default, the "Adults Information" section of the form appears above the section where information is added for children. This setting moves the

"Children" section above the "Adults Information" section.

### Family Pre-Registration Block Settings




1. **Adult Fields**
   The options here determine which fields in the Adult Information section of the *Family Registration* screen will be displayed. Select options according to your organization's preferences.

2. **First Adult Create Account**
   In addition to creating a record in Rock, the person can also create their account so they can log in right away. You can make account creation required or optional.

3. **Create Account Title**
   This is simply the title of the area that displays when account creation is shown. This only applies if *First Adult Create Account* is not set to Hide.

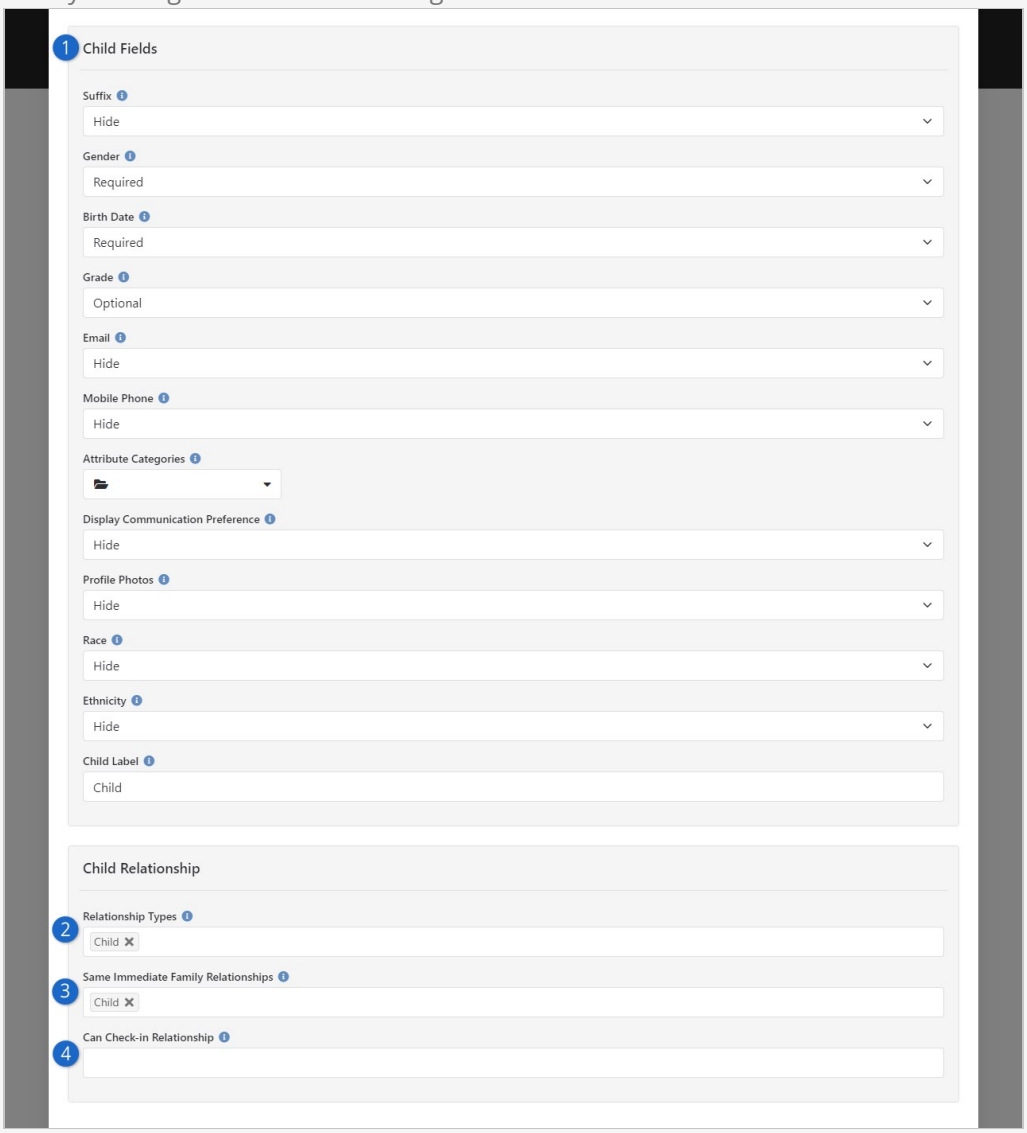
4. **Create Account Description**
   The description you provide here will appear below the *Create Account Title* configured above. Again, this only applies if *First Adult Create Account*

is not set to Hide.

5 **Race**
You can choose to collect a person's race, which describes their physical traits and characteristics.

6 **Ethnicity**
You can also choose to collect a person's ethnicity, which is a cultural identifier.

Family Pre-Registration Block Settings




1 **Child Fields**
The fields in this section determine how the fields in the Child section of the *Family Registration* screen will be displayed. Select options according to your organization's preferences.

2 **Relationship Types**
Select the known relationship type roles that should be displayed as an

option for each child. The value 'Child' will always be included, even if it is not an existing known relationship type.

3. **Same Immediate Family Relationships**
   Select the known relationship type roles that, if selected, should not actually create the relationship, but rather just add the child to the same family as the adults. In most cases, 'Child' will be the only value included in this list. Any values included in this list that are not in the Known Relationship Types list will be ignored.

4. **Can Check-in Relationship**
   Select the known relationship type roles that, if selected, should also create an additional 'Can Check-in' relationship. This is only necessary if the role that is selected does not have the 'Allow Check-in' option.

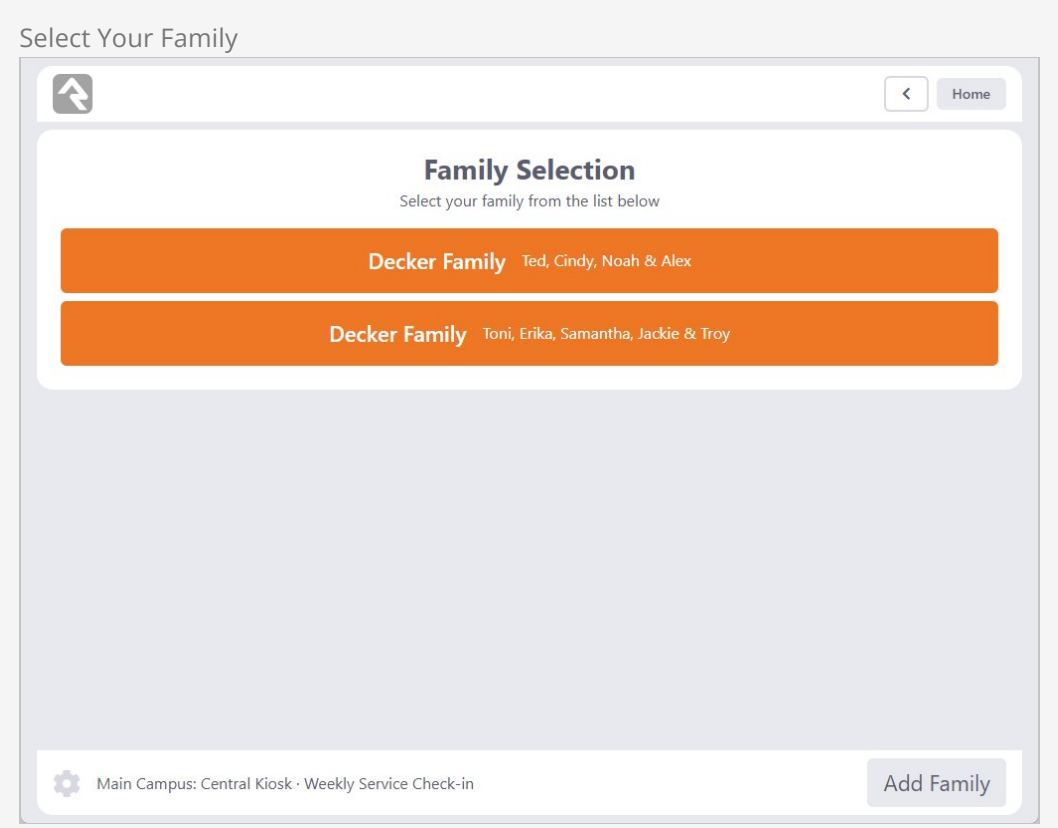
As you can see, there are several ways to get new people into Rock. You can even turn a kiosk into a volunteer assisted, walk-up registration station to help get people registered. Read more about that in the Check-in Registration chapter.

# Check-in Registration

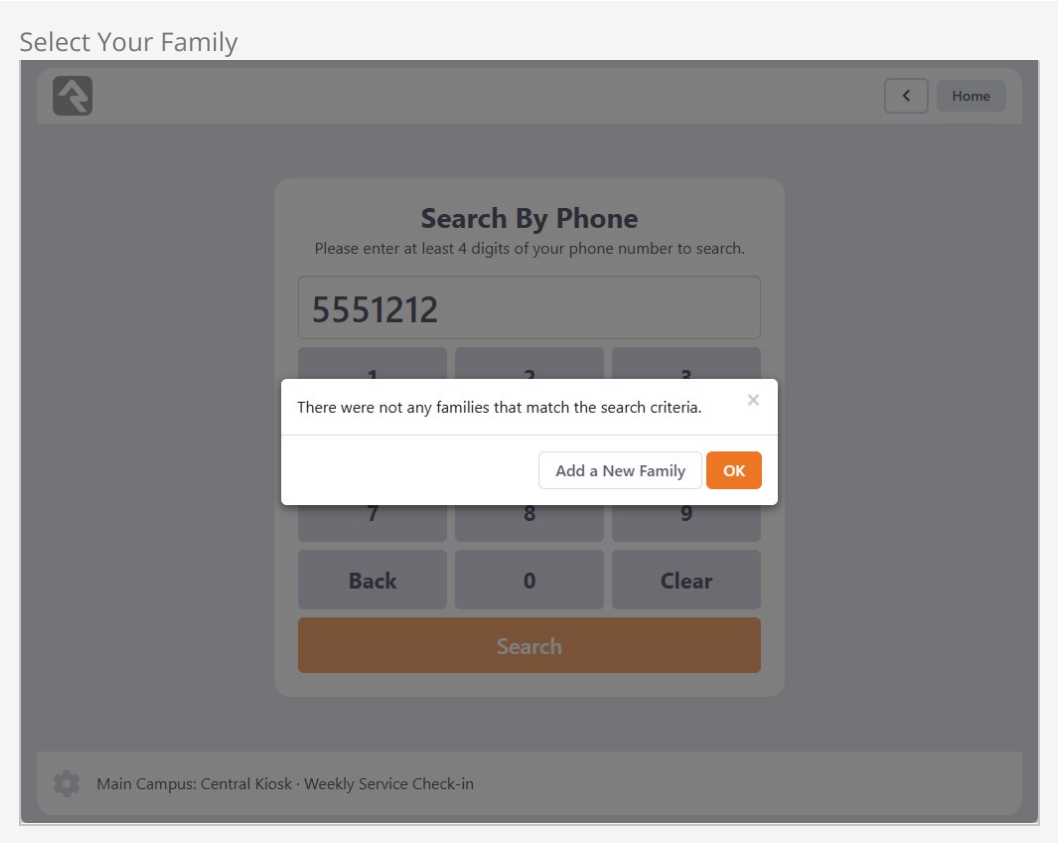
A check-in kiosk can also be used by a volunteer to register new families or add guests to existing families.

Although the experience is as simple and smooth as can be, it's not intended to be used by your guests. We recommend you pair the kiosk with a friendly volunteer who is good with quick data entry.

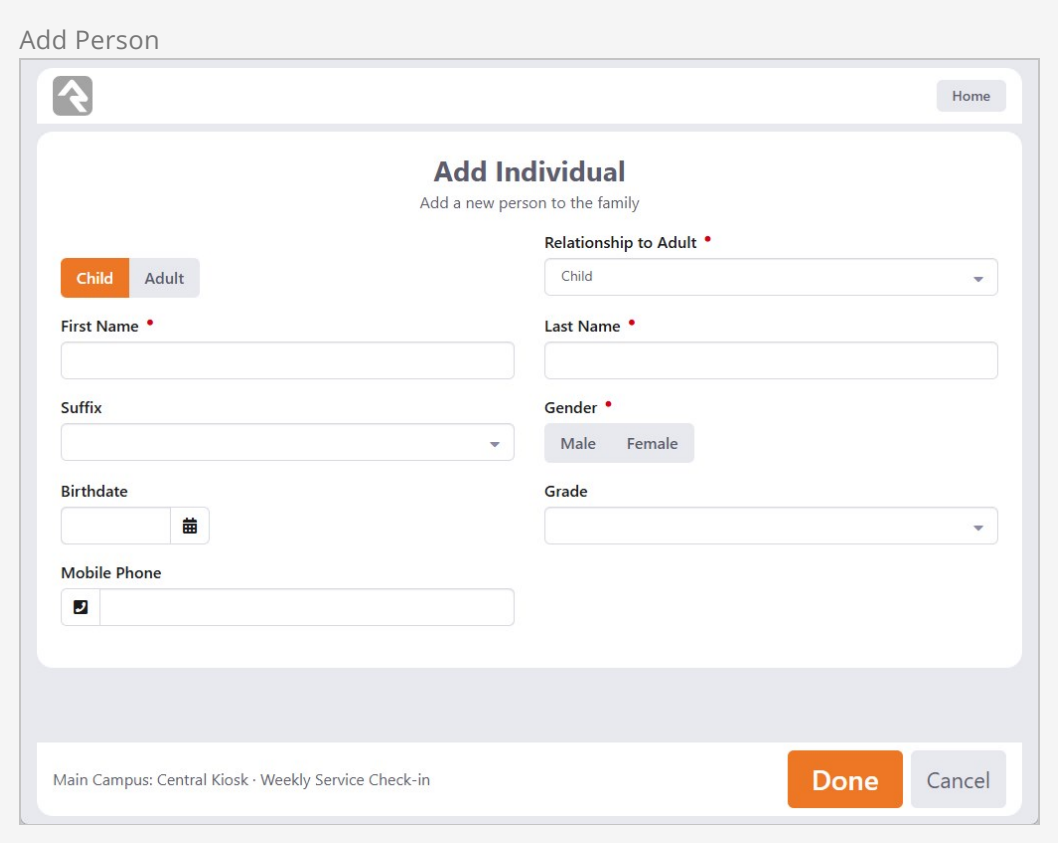
On a kiosk with this mode enabled, after searching for a family you will see new `Add Family` options whether you find a match...




...or not.



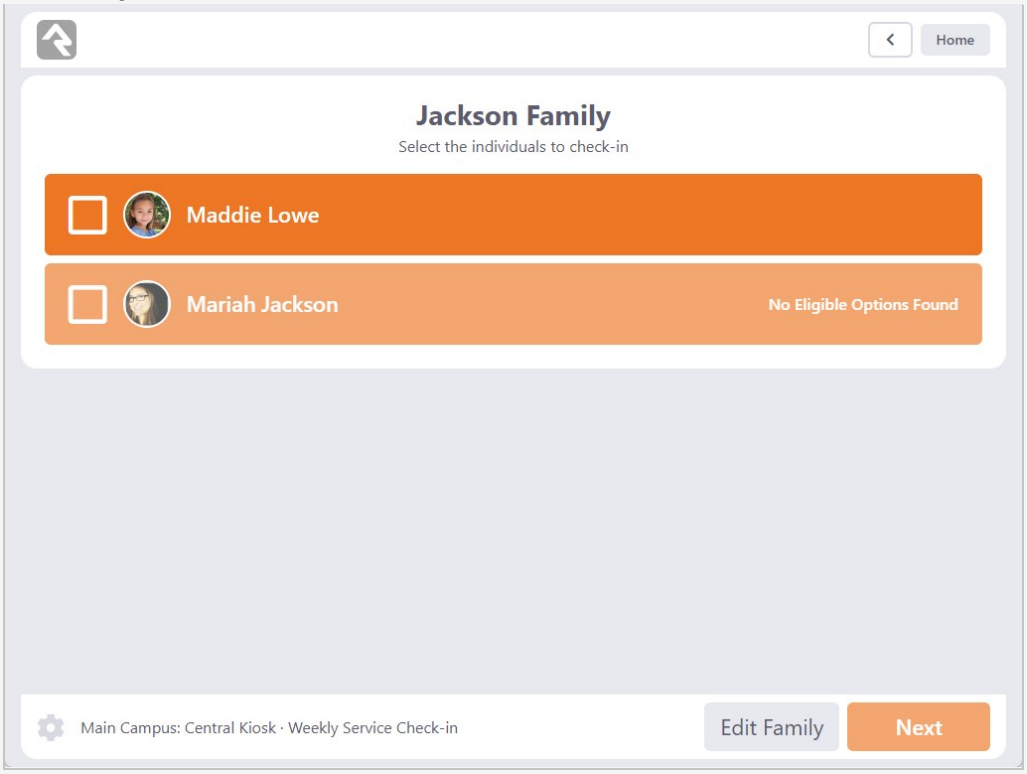

To speed up the process, when adding new people you will see only the essential fields -- although you can configure what other optional or required fields (person attributes) you want to capture during these steps. Organizations will typically add additional information not essential to check-in at a later point when there is more time.



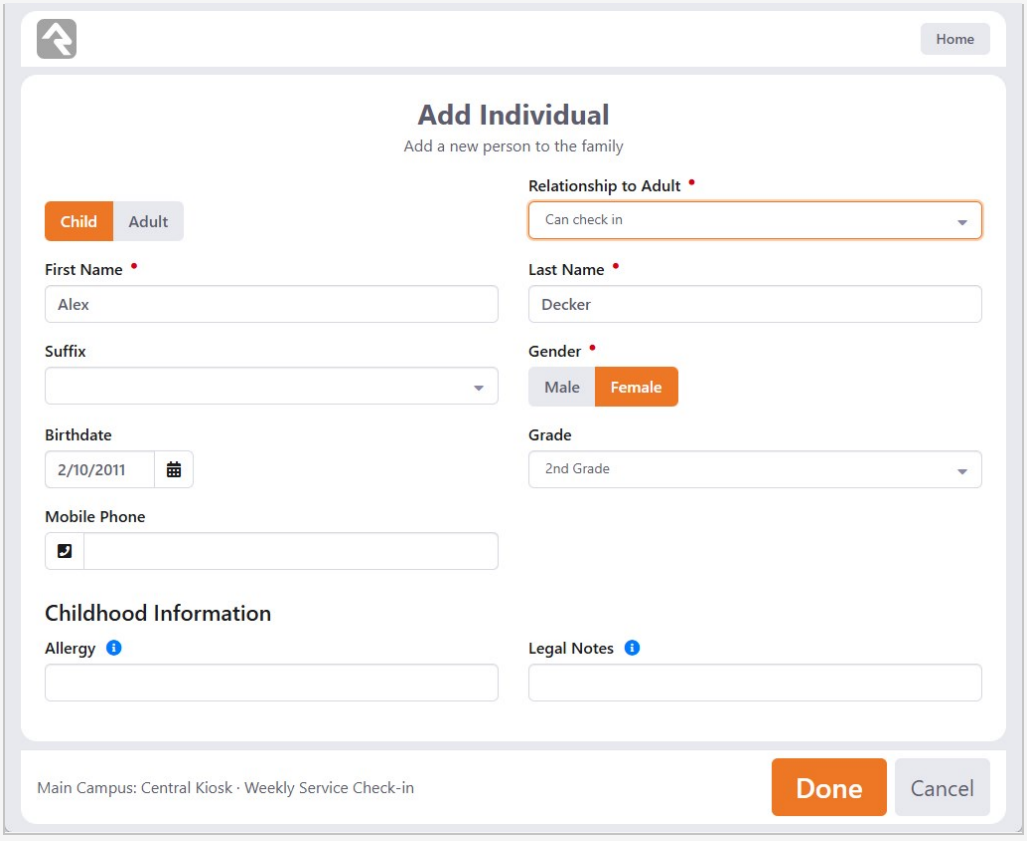

## Editing Families

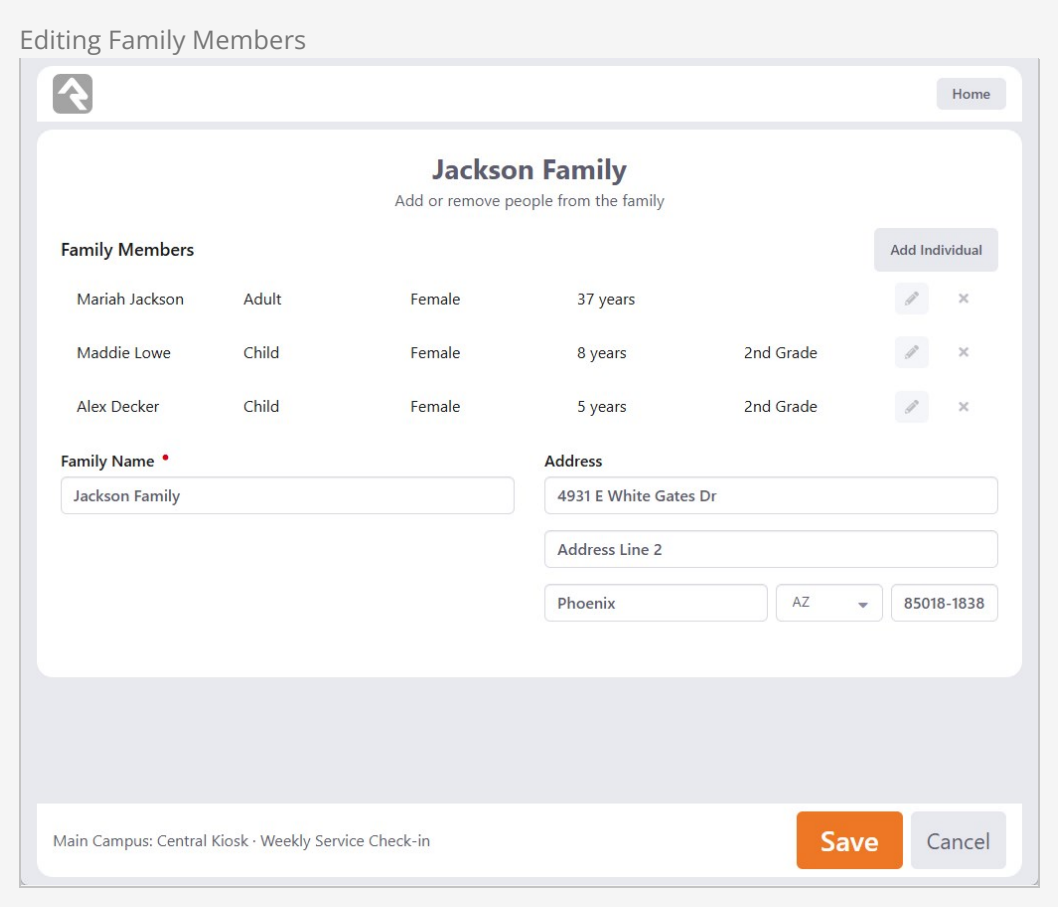
Did Maddie bring her friend Alex to church with her? No problem. Adding guests of a family is a breeze with the 'Can check in' relationship. Just select the new 'Edit Family' button, then 'Add Individual', then and add Alex with that relationship.

Edit Family

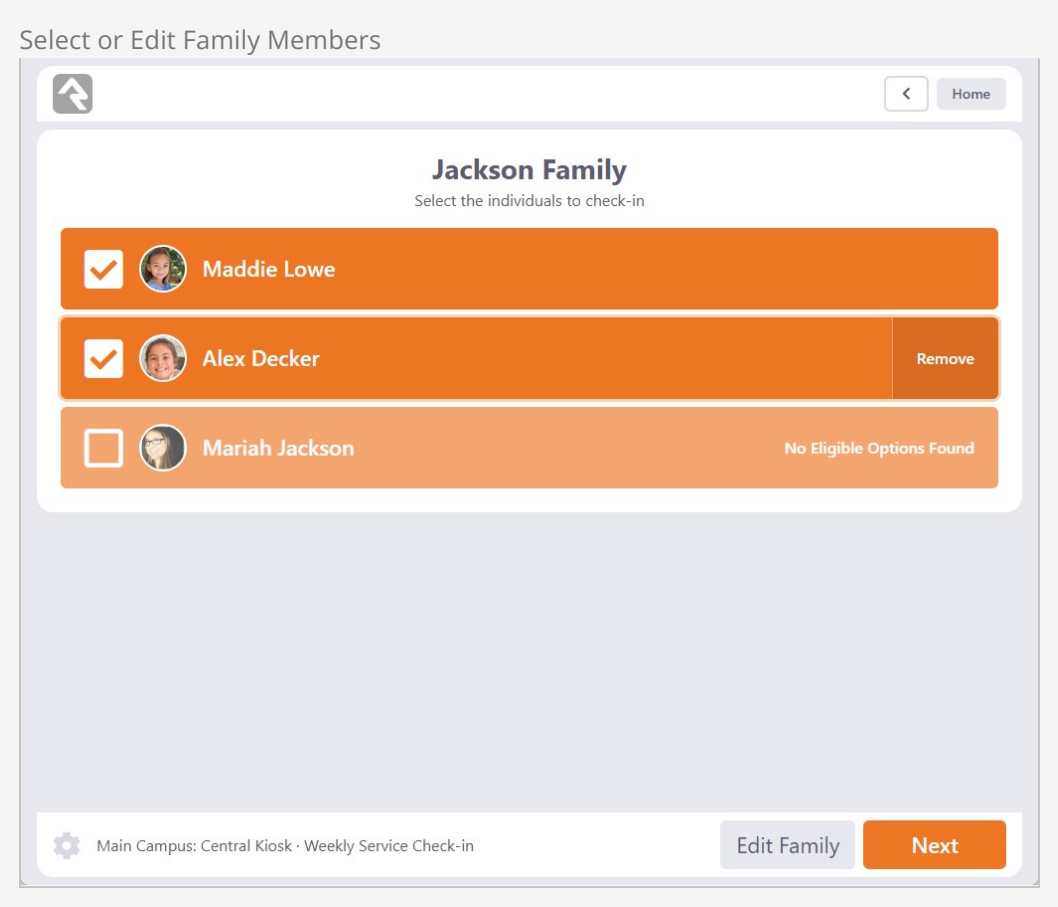



Adding a Guest






We've even enabled some duplicate detection so you're less likely to end up with another Alex Decker in your system.



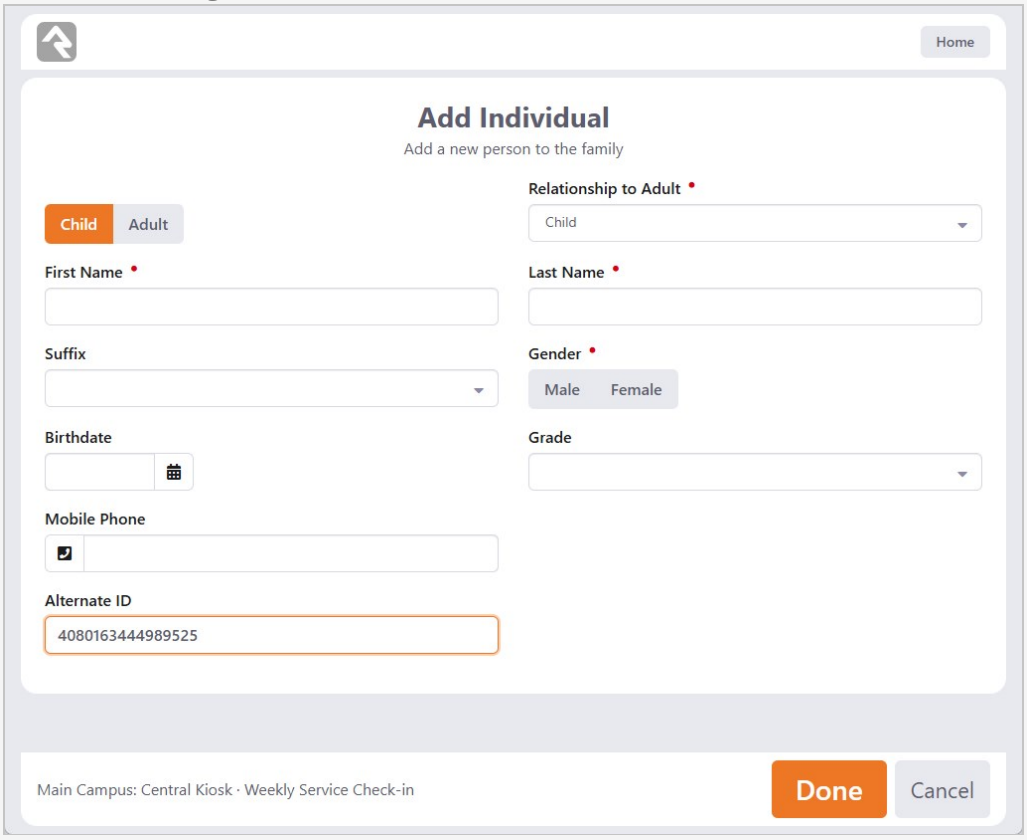

There are a few things to note regarding duplicate detection. When adding multiple 'guest' adults, if one of them matches a person in Rock, the other new adults (and new children) will be added to that person's matching family. Also note, when a matching person is found, only non-blank field values will update the matching person's record. This will prevent accidentally clearing out a person's allergy or legal notes (for example) in the event that they didn't provide the current/correct values.

The check-in registration page can display all family members, but if there is a family member that isn't able to check-in, that family member is greyed out. You'll see the reason they can't be selected (either *No Locations Available* or *No Matching Groups Found*). Also, the `Change` button will be hidden if a person has only one available schedule.

## Adding Barcodes in Check-In Registration

If your organization uses barcode scanners for rapid check-in, we've also enabled these screens to know where to put the data coming from the scanner. Scanning a barcode on this screen will ensure it will automatically go into the *Alternate ID* field if you have enabled it (as described in the Configuration section below).

Barcode Scanning

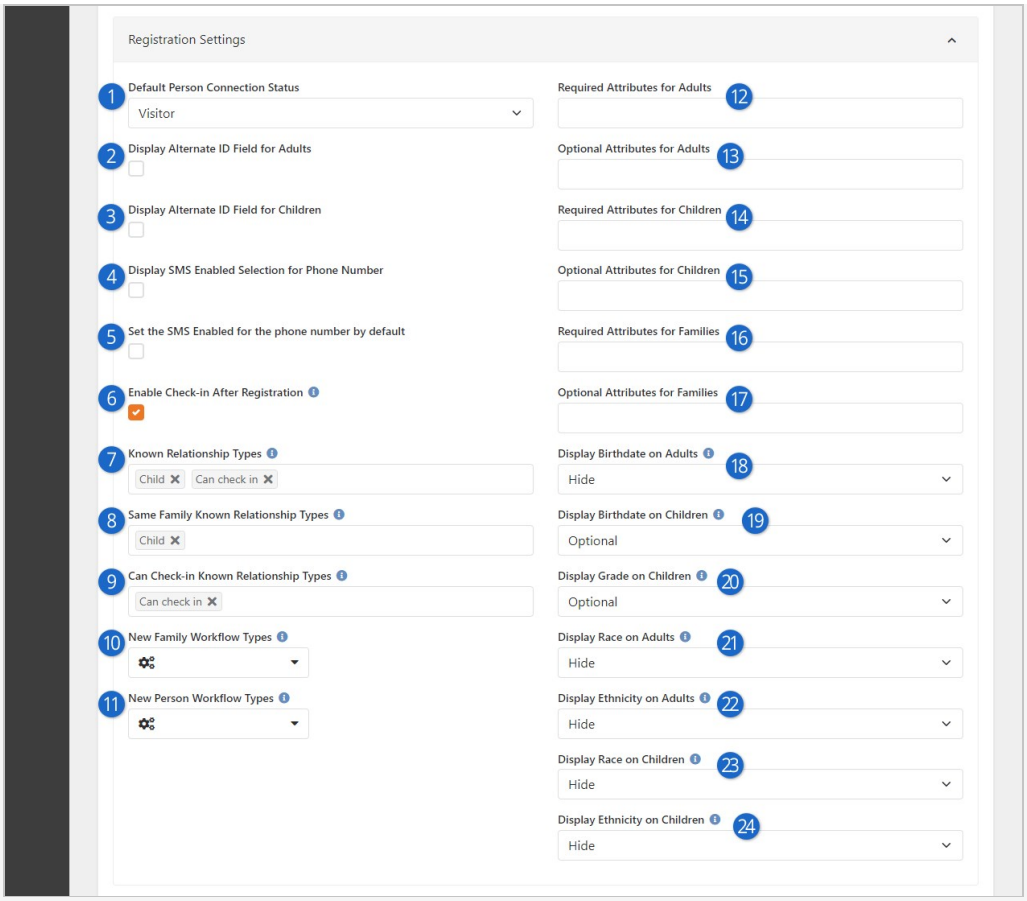



## Check-in Registration Configuration

These registration features are packed with options. To configure these options, follow these steps:

1. First, enable a particular device kiosk by setting its Registration Mode to 'Yes'.
2. Then open up the check-in configurator `Admin Tools > Check-in > Check-in Configuration`.
3. Select the configuration you want to enable registration for and then `Edit`.
4. Change the *Registration Settings* as needed (see below) and then `Save`.

Registration Settings




1. **Default Person Connection Status**
   This controls which connection status to use when creating new people (children or adults).

2. **Display Alternate ID Field for Adults**
   If checked, a field will be shown on the adult add/edit screen that can store an alternate id (such as a key tag or barcode identifier) for that person. When enabled, scanning a barcode using a reader will capture the code into this field automatically.

3. **Display Alternate ID Field for Children**
   If checked, a field will be shown on the Child add/edit screen that can store an alternate id. When enabled, scanning a barcode using a reader will capture the code into this field automatically.

4. **Display SMS Enabled Selection for Phone Number**
   If you select this option, then a field will appear to indicate that the person's phone number is SMS enabled.

5. **Set the SMS Enabled for the phone number by default**
   If enabled, this setting will automatically set the person's phone number as SMS enabled.

6. **Enable Check-in After Registration**
   This determines if the family can continue to check-in after being registered, or if they should be directed to visit a regular check-in kiosk to check-in. If unchecked, the kiosk will return back to the search mode after data entry.

7 **Known Relationship Types**
Select the known relationship types that should be displayed as an option for each child. The value 'Child' will always be included, even if it is not an existing known relationship type.

8 **Same Family Known Relationship Types**
Select the known relationship types that, if selected, should not actually create the relationship, but rather just add the child to the same family as the adults. In most cases, 'Child' will be the only value included in this list. Any values included in this list that are not in the Known Relationship Types list are ignored.

9 **Can Check-in Known Relationship Types**
Select the known relationship types that, if selected, should also create an additional 'Can Check-in' relationship. This is only necessary if the role that is selected does not have the 'Allow Check-in' option.

10 **New Family Workflow Types**
Select any optional workflows you want to launch after a new family is added. For any workflows launched, it will set the Entity for the workflow to the family group that is being created.
Note: This is only for actual new families and not families that are incidentally created as a result of adding a guest to an existing family.

11 **New Person Workflow Types**
Select any optional workflows you want to launch after a new individual is added to a family. For any workflows launched, it will set the Entity for the workflow to the person that is being created.

12 **Required Attributes for Adults**
These are attributes you want to require on the adult records. These attributes will be required regardless of their original configuration on the *Person Attributes* page.

13 **Optional Attributes for Adults**
These are attributes you want to show when adding or editing an adult. These attributes will be optional regardless of their original configuration on the *Person Attributes* page.

14 **Required Attributes for Children**
These are attributes you want to require on the child records. These attributes will be required regardless of their original configuration on the *Person Attributes* page.

15 **Optional Attributes for Children**
These are attributes you want to show when adding or editing a child. These attributes will be optional regardless of their original configuration on the *Person Attributes* page.

16 **Required Attributes for Families**
These are family attributes you want to require on the family record. These attributes will be required regardless of their original configuration on the Group Type.

17 **Optional Attributes for Families**
These are family attributes you want to show when adding or editing a family. These attributes will be optional regardless of their original

configuration on the Group Type.

18 **Display Birthdate on Adults**
Specific to adults, you can choose to *Hide* the birthdate field, or make it *Optional* or *Required*. This is set to *Hide* by default.

19 **Display Birthdate on Children**
Similar to the Adults field above, here you can choose to *Hide* the birthdate field, or make it *Optional* or *Required* for children. This is set to *Optional* by default.

20 **Display Grade on Children**
You can choose to *Hide* the grade field or make it *Optional* or *Required*. This is set to *Optional* by default.

21 **Display Race on Adults**
You can choose to collect the adult's race, which describes their physical traits and characteristics.

22 **Display Ethnicity on Adults**
You can also choose to collect the ethnicity of the adults, which is a cultural identifier.

23 **Display Race on Children**
As with adults, you can optionally choose to display a race selection for children.

24 **Display Ethnicity on Children**
Similar to the above, ethnicity information for children can be collected.

# Check-In Manager

It's critical for growing organizations to be able to view check-in data in real-time and react by opening and closing locations in response. Rock provides a check-in management site that gives your staff a dashboard of live check-in data and lets them respond to needs as they occur in real-time.

## The Phases of Check-in

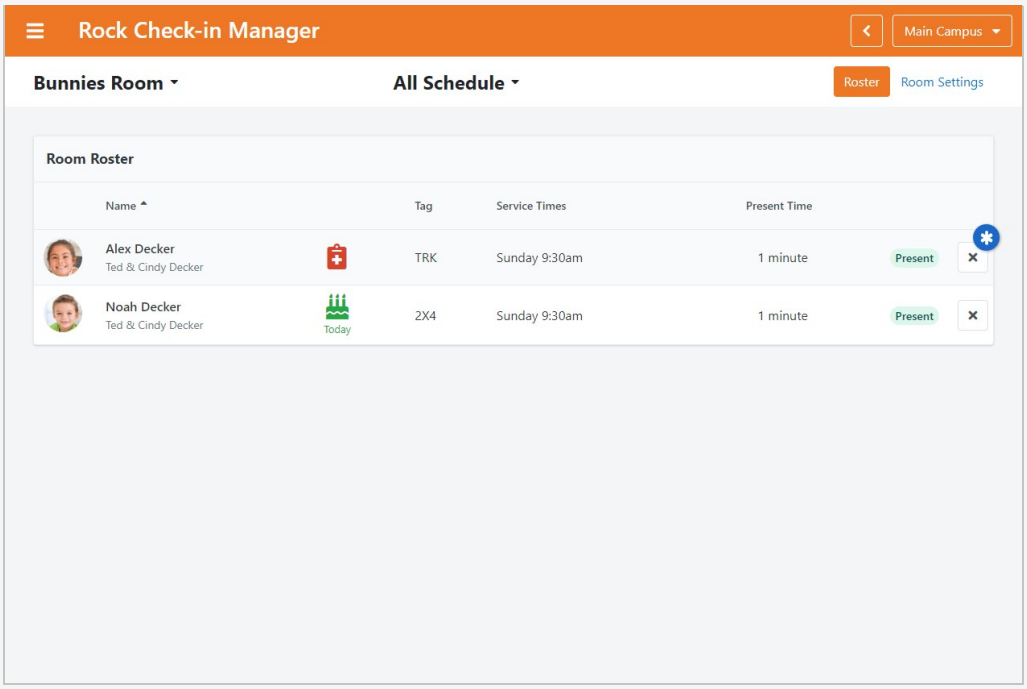
The check-in process doesn't necessarily end when someone finishes checking in. Depending on your settings there are different phases of check-in. A person can be *Checked-in*, *Present* or *Checked-out*. Later in this chapter you'll see how this all gets configured and managed within the Check-in Manager. For now, it's only important to be aware of the different states a person can be in.

### Checked-in

When a person finishes the check-in process, they will appear as **Checked-in** on the roster. What can happen next depends on your configuration.

If you don't have check-out or presence enabled in your Check-in configuration settings then the other states described below don't apply. The person will be marked as *Present* (see below) unless the Check-in Manager is used to *Delete* their check-in attendance entirely.

Cancel Check-in




### Delete Attendance

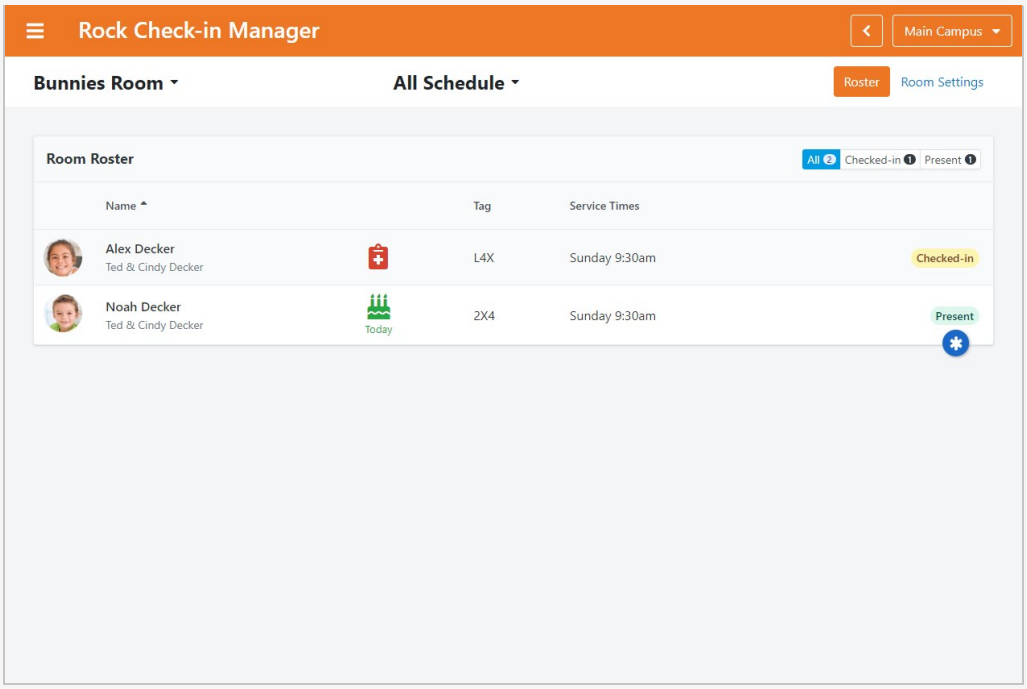
If you look at the security settings for the Roster block, there is a special *Delete Attendance* security verb. This controls who is able (or not able) to delete attendance as pictured in the screenshot above.

## Present

Being checked-in isn't always the same as being in the room or location. A lot can happen between checking in on your phone from the parking lot and arriving in the intended space. Rock's *Presence* feature lets you keep track of who is physically in a seat, making it easy to see how many of your checked-in guests are in the room or not.

To mark someone as present, navigate to the 'Checked In' tab along the top of the roster. A person must be checked in before they can be manually marked as **Present** in the roster.

Present




From the 'Present' tab of the roster you can check people out individually or, if enabled in the block settings, you can check out all people who are marked present. From the block settings you can also enable the *Staying* feature, which lets you mark a person as staying for the next service, creating a new attendance record for that person. Lastly, you can update the block settings to add a *Not Present* button. This reverts a person back to *Checked In* if, for instance, they were accidentally marked as present but aren't actually in the room.

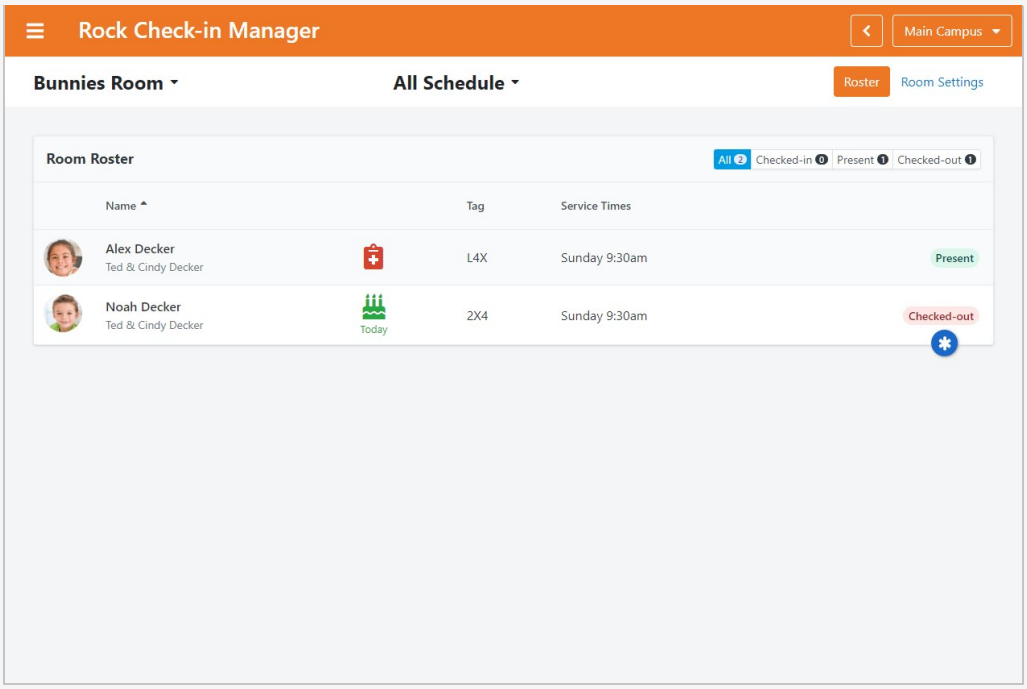
> ### Attendance Record Cleanup
>
> When someone checks in, an attendance record is created showing them as having attended. This might not always be true if the person has checked in but has not been marked as *Present*. The Rock Cleanup job has an optional setting to clean up these records. If enabled, the attendance record will still exist, but the person will be marked as not having attended if they were never *Present*. This only applies if *Presence* is enabled.

### Checked-out

At times, people will need to leave earlier than planned. If *Enable Check-out in Manager* is enabled in your Check-in Configuration, you can indicate that someone has left the room. The person will still appear in the Roster as **Checked-out** and the check-in is not removed from their record. For more details, see the Manual Checkout section.

To check someone out, you'll navigate to the 'Present' tab along the top of the roster. Only people who are Present can be checked out. If *Presence* is not enabled, then a checked in person is automatically considered as being present.

Checked-out




If enabled in the block's settings, you can also re-mark someone as Present from the 'Checked Out' tab if they have been checked out. Maybe they left the room but decided to come back, or maybe they were checked out by accident.

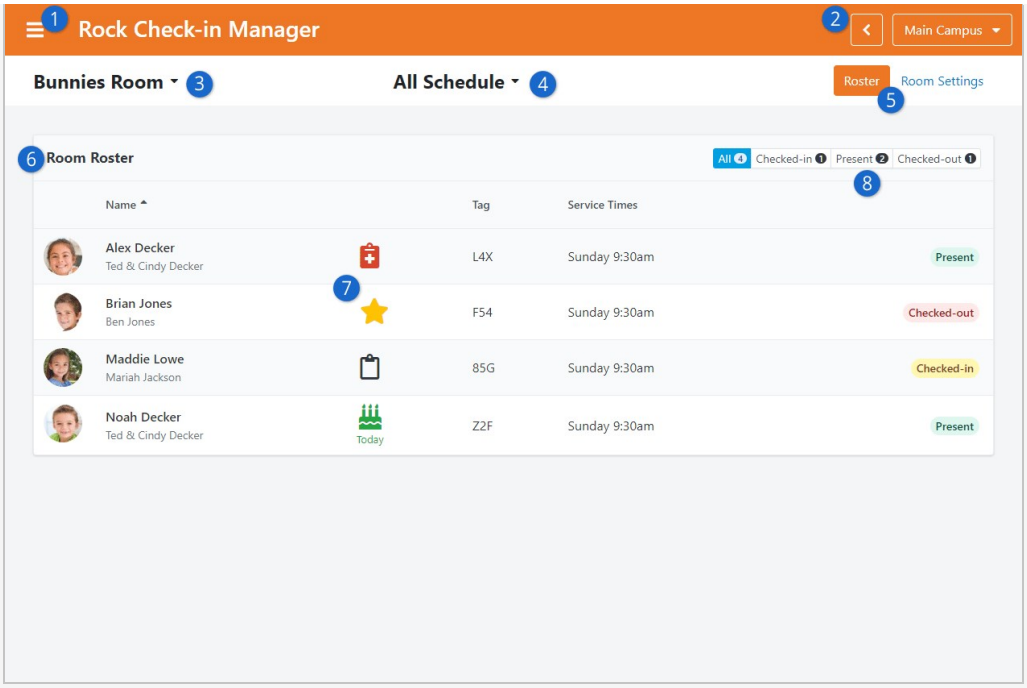
## Using the Check-in Manager

The check-in manager can be loaded from the address `http://[your-rock-server]/checkinmanager`.

When you access this screen for the first time, you'll be prompted to select a campus if you have more than one to choose from. Next, you'll select a Location near the top-left to see the *Room Roster* for that Location. Let's look at what we can do from there.

> ### Mobile Friendly
>
> Check-in Manager was designed with kiosk devices of all sizes in mind. That means the pages might look a little different from the below screenshots if you're working with a smaller screen. For instance, the Tag and Service Times columns will be combined into a single column at some resolutions. Similarly, you'll notice icons (e.g., ✓) instead of words (e.g., 'Present') for the check-in states.

Check-in Manager Room Roster




1 **Navigation Panel**
Click the three horizontal lines (the ☰ icon) to open the navigation panel. From here you can access other areas of the Check-in Manager. We'll cover those areas in more detail below.

2 **Back / Campus Selection**
At the top of each page is a 'back' button you can use to navigate back to prior pages. Next to the back button is a drop-down to switch between your campuses, to show rosters for rooms at different campuses as applicable.

3 **Location Selection**
You can select or change the Location here. This will update the Roster being viewed.

4 **Schedule Selection**
You can select or change the Schedule here. This will update the Roster to show only check-ins for the selected Schedule.

5 **Roster / Room Settings**
Click here to toggle back and forth between the Roster and the Room Settings views. From the Room Settings view you can Close or Open the selected room.

6 **Room Roster**
The roster gives you a lot of information about each person, including check-in label codes and their check-in state. You can click on any row in the roster to view additional details about the person (see below).

7 **Person Information Icons**
These give you a visual clue that the person has things like legal notes, allergies or an upcoming birthday. In this example Alex Decker has an allergy you might want to know about, Maddie Lowe has a legal note, and Brian has a star to show this is his first check-in. You can change which attributes are displayed by adjusting the *Check-in Roster Alert Icon*

*Category* block setting, or by adding attributes to the default *Check-in Manager Roster Attributes* category. For consistency, any attributes you use on the roster should have an *Icon CSS Class* and an *Attribute Color*.

8 **Room Roster Filter**
You'll only see these buttons if *Enable Check-out in Manager* and/or *Enable Presence* are enabled for the Check-in Type. The experience will be slightly different if only one or neither of those settings are enabled.

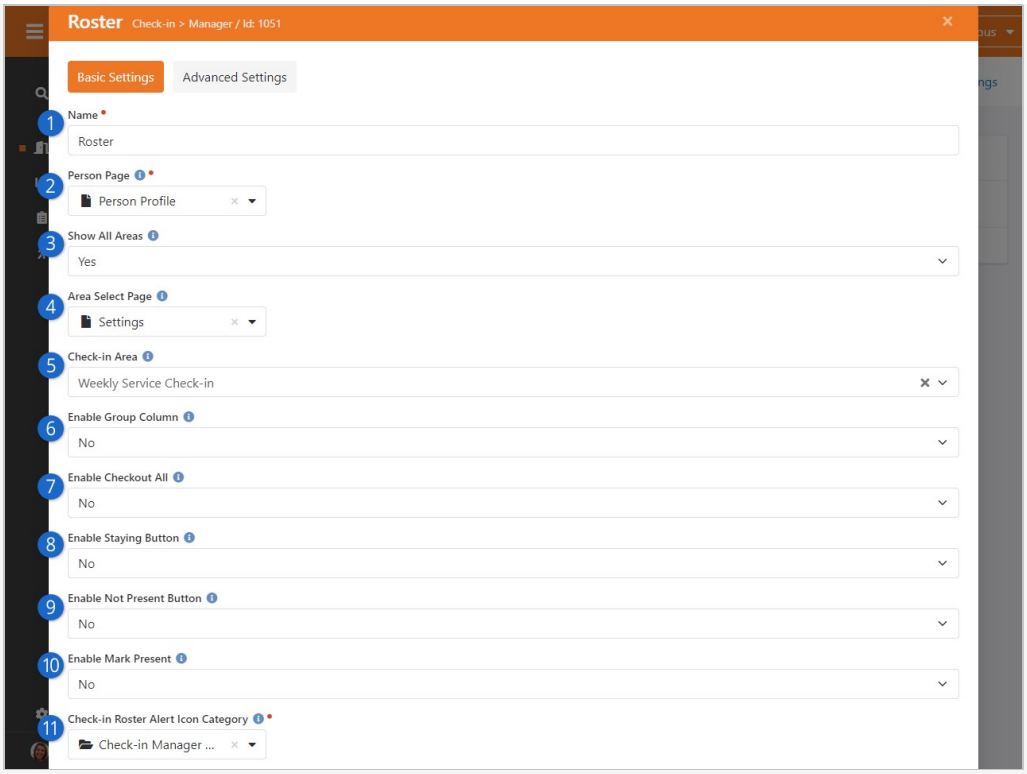
- **All:** Shows all the people who have checked in to the selected room. This is the view that is pictured in the screenshot above.
- **Checked-In:** This will show only people who have checked in, and who have not been Checked-out or marked as Present. This is also where staff will come to mark someone as Present when, for instance, the person physically arrives at the room. This only appears if *Enable Presence* is enabled for the Check-in Type.
- **Present:** This view will display only individuals who have been marked as Present. If *Enable Presence* is disabled for the Check-in Type, then everyone who checks in is automatically considered Present. From here, staff can Check-out individuals who have left the room or are otherwise not considered present if *Enable Check-out in Manager* is enabled in the Check-in Type configuration.
- **Checked Out:** Shows all the people who have been checked out from the selected room.

A single person can be checked into the same room for different services. In those cases, you'll see each service listed, and separate states (e.g., 'Present' or 'Checked In') if the person isn't in the same state for both rooms.

> Closing a Room
> When you close a room using the Check-in Manager it can take several seconds for the room to show closed on the kiosks, depending on the Refresh Interval setting of the current check-in configuration. If your kiosks aren't reacting fast enough to room closures, it could be that you have the Refresh Interval set too high.

Before we move on from the roster, you'll want to take a look at its block settings. These settings can be used to enable a variety of features to align the roster's functions with your check-in processes.

Roster Block Settings




1 **Name**
The name of the block can be changed if needed. The name is only visible to admins.

2 **Person Page**
The Check-in Manager has its own *Person Profile* page (see next section below) that people will be directed to when they click a person's row on the roster. You can use this setting to direct people to a different page instead. Typically, this won't be changed.

3 **Show All Areas**
This setting references check-in configurations (e.g., Weekly Service Check-in) and not check-in areas (e.g., Elementary Area). If set to *Yes*, then the roster will show check-ins from any configuration. If set to *No*, then the roster will only show check-ins according to the *Check-in Area* block setting described below.

4 **Area Select Page**
Like the above setting, this references check-in configurations. If *Show All Areas* is disabled, and if a check-in area has not been configured or selected, this is the page that the person will be brought to. Typically, this setting will not change.

5 **Check-in Area**
If *Show All Areas* is disabled, this is where you can set which check-in configuration the roster should use. Only check-ins from the selected area will be shown on the roster.

6 **Enable Group Column**
If enabled, then the group and the check-in area the person checked in to will be displayed in a new "Group" column on the roster.

7 **Enable Checkout All**

If enabled, a `Check Out All` button will appear on the *Present* tab of the roster. This will check out everyone who is Present on the roster all at once. This only applies if *Enable Check-out in Manager* is enabled in the check-in type's configuration.

8. **Enable Staying Button**
   Enabling this will cause a new button (with the  icon) to appear on the *Present* tab of the roster, or the main roster, depending on your check-in configuration. Clicking the button indicates the person is "staying" for another service and will check the person in for the selected service.

9. **Enable Not Present Button**
   This setting only applies if *Enable Presence* is enabled in your check-in configuration. This will give you a new button (with the  icon) on the *Present* tab of the roster, where you can mark someone who was previously marked Present as no longer being Present.

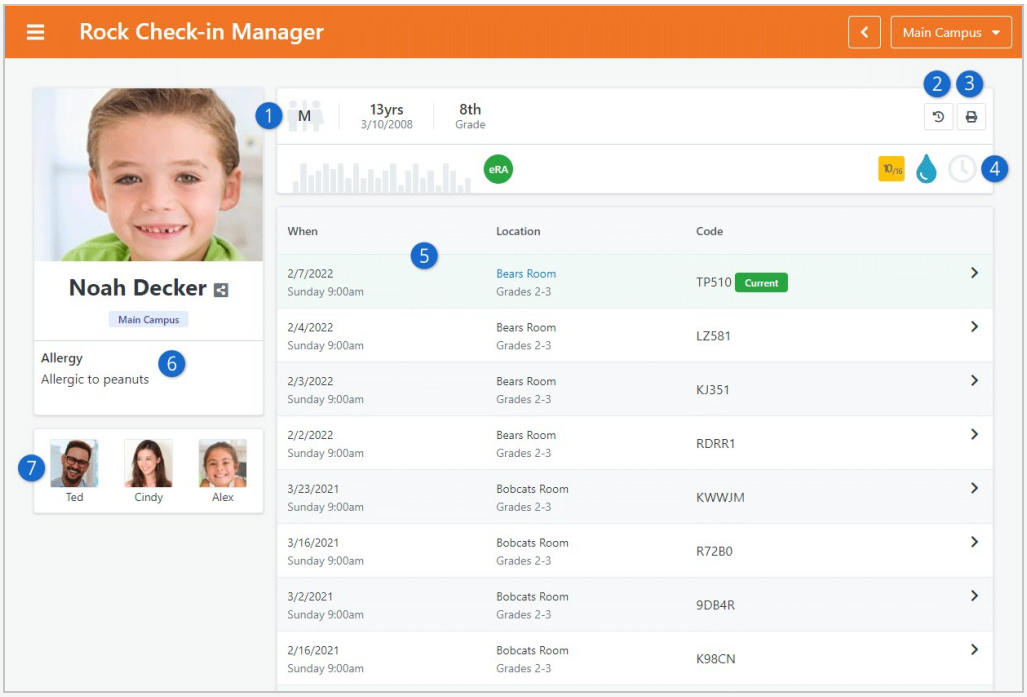
10. **Enable Mark Present**
    This setting only applies if *Enable Presence* and *Enable Check-out in Manager* are enabled. This will give you a button on the *Checked-out* tab of the roster, where you can mark someone who was checked out as being present again.

11. **Check-in Roster Alert Icon Category**
    Person attributes that belong to the category selected here (default is *Check-in Manager Roster Attributes*) will be shown as icons on the roster. For consistency, any attributes you add to the roster should have an *Icon CSS Class* and an *Attribute Color* configured.

## Check-in Manager Person Profile

There are lots of ways you can get to the *Check-in Manager Person Profile* page. Whether you arrived here from a *Search*, from the *Room Manager* or from *Live Metrics*, there's a lot to see and do on this page.

Check-in Manager Person Profile




1. **Person Information**
   You can see the person's photo and campus to the left, as well as their gender, age and grade along the top of the page.

2. **Attendance History**
   Clicking this icon will take you to a page listing the changes that have been made to the person's check-in attendance data. For instance, you could use this page to track that the person switched rooms or had their attendance deleted.

3. **Reprint Labels**
   You won't see this button if label reprinting is disabled. Otherwise, you can click here to reprint labels for the person. When you do, you'll be asked to select which label(s) to print, and which printer should be used. See the Reprinting section in this guide for full details. Note that there is a "Reprint Labels" security option on the "Person Recent Attendances" block that allows for finer control over which roles can see the re-print label button.

4. **Badge Bar**
   By accessing the block settings for this page, you can select badges to display on either the left or right side of the bar. In this example we're showing attendance, eRA, baptism, and more that you can't see because they don't apply to Noah. This bar can tell you a lot about a person, quickly and easily.

5. **Check-in History**
   The center of the page shows the person's check-in history, including the *Current* check-in and past check-ins from other services. In this example, you can click on the *Bobcats Room* link in the *Current* row to access the *Room Roster*. Clicking the row itself reveals attendance details and allows for updates or deletion. When you edit the attendance record, you can update the person's check-in and check-out dates and times if enabled in the Attendance Detail's block settings.

6 **Person Attributes**
If enabled in the block's settings, you can choose to display person attribute data for a given category. Separate categories can be selected for children and adults. You'll probably want to select the same person attribute category that is used on the *Roster* page (e.g., *Check-in Manager Roster Attributes*).

7 **Family Members**
Each family member for the person being viewed is displayed here. Click on any family member to view the Check-in Manager profile for that person. You'll find there are more features for parents, as noted below. In this example there isn't any contact information for the children, but phone numbers and emails for the parents will be displayed on their profile.

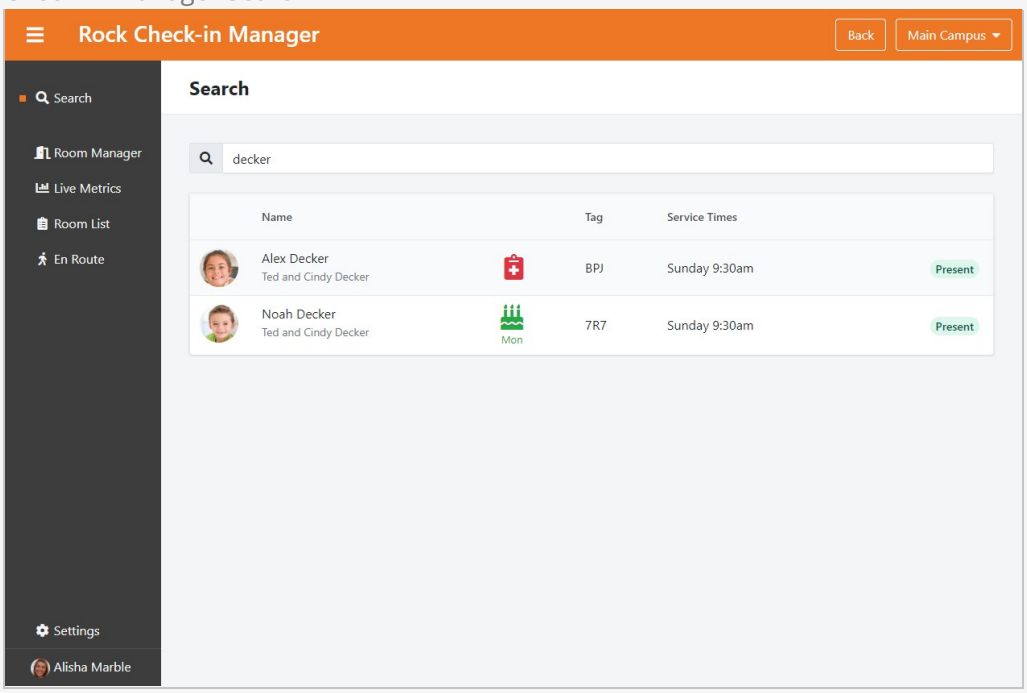
In the person profile's block settings, there's an option to *Share Person*. If this feature is enabled, you'll see the share icon () next to the person's name. Clicking the icon will generate a link that can be shared to edit that person's profile. This is great for situations where a room attendant needs to send the individual to a roaming staff person in order to quickly edit the person's record in Rock.

## Navigating Check-in Manager

As noted above, you can click the ☰ icon at the top-left of the page to expand the Check-in Manger's navigation menu. From here you can search for individuals, view check-in metrics, change Check-in Types or navigate back to the Room Manager described above in the prior section.

### Searching for Individuals

Check-in Manager Search




As pictured above, you can search for individuals and then select them from the list. In this example we searched for 'Decker', and we were provided with two of the four Decker family members. The adults don't have any check-in data for today so won't appear in this list even though they're still part of the Decker family.

Clicking on any person's row within the search results will bring you to that person's Check-in Manager person profile.

> ### Searching by Code
> You can also search for a person by the check-in code assigned to them by the check-in system. To ensure this option is available, check that it's enabled in the Search block's settings. You can then conduct the search in the same way as detailed above, entering the check-in code in the search field rather than the person's name. Remember, check-in codes are only used once per day.

> ### Person Attribute Settings
> Be sure to check out the *Person Profile* block settings to set the *Child Attribute* and the *Adult Attribute* categories to view on each person's check-in profile page. This may be helpful if you offer a snack during class and need to see which type of allergy a child may have. You can link the child attribute category directly with the childhood information on their main profile page.

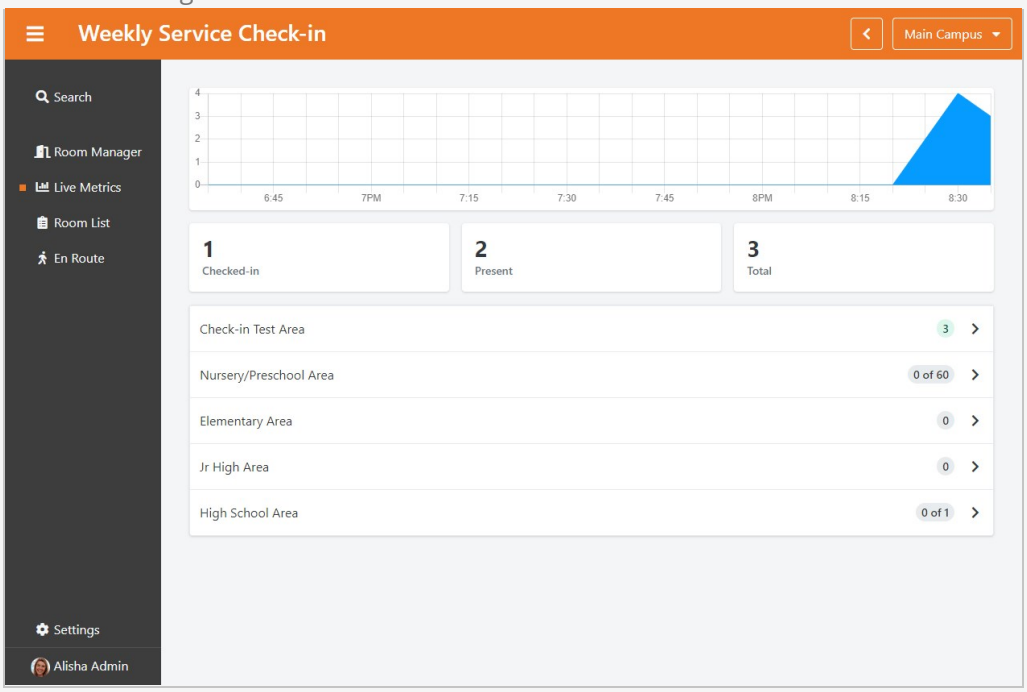
### Live Metrics

The *Live Metrics* page shows you a lot about who is checked in, where and when they

checked in. Let's take a look at what can be seen here.

At the highest level, pictured below, you can see each of the check-in areas and how many people have checked in to all those areas.

Check-in Manager Live Metrics - Areas

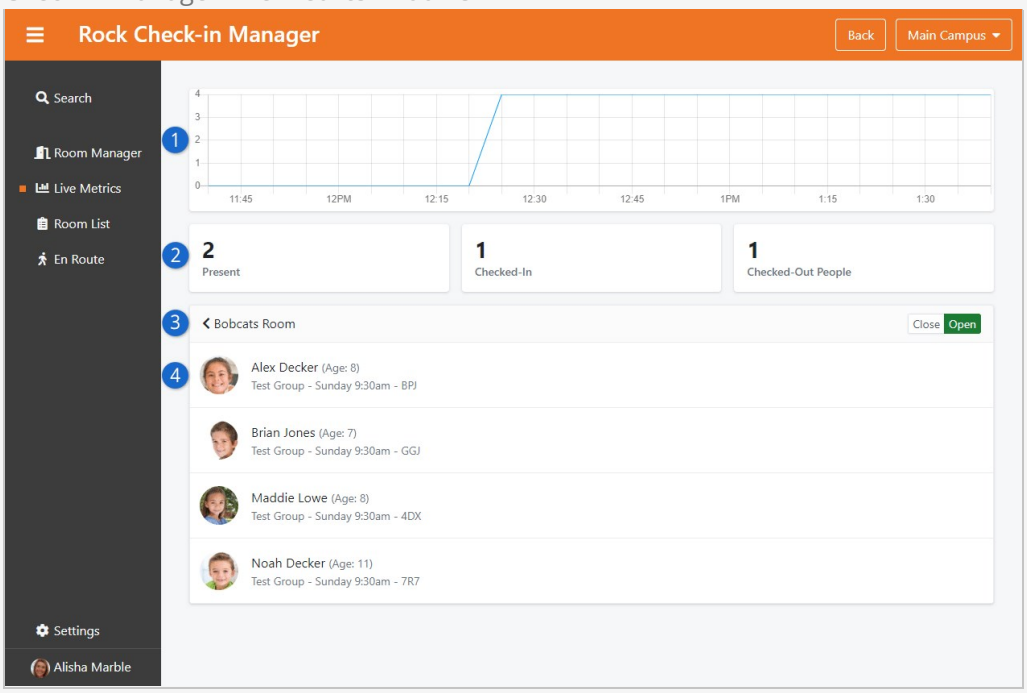



Clicking on any area will show you the groups, and then rooms, under that area. At each stage, the metrics pictured above will change to reflect your selection. In the screenshot above, you can see '3' people are in the test area we're using. If there was a capacity set for this room, it would appear as it does for the Nursery/Preschool Area and High School Area.

> ### Filled Spots and Shared Locations
> The totals in the screenshot above are the rolled-up values from the areas and groups beneath. Depending on how your locations are shared across areas, these numbers may be confusing as you drill down, because the numbers of checked-in people may not appear to roll-up. That's because some people will be in the same location, but from a different area.

Let's take a close look below at the page after we've navigated all the way down from the areas to the individual room level.

Check-in Manager Live Metrics - Rooms




1. **Check-in Graph**
   The graph at the top of the page shows you when people have checked in for the area, group or room being viewed. In this case we're looking at the Bobcats room, so the graph shows when this set of people checked in.

2. **Check-in Counts**
   Here you can see counts of how many people are Checked-In, Present or Checked-Out. Like the graph, these numbers will change if you are looking at a different room or check-in area.

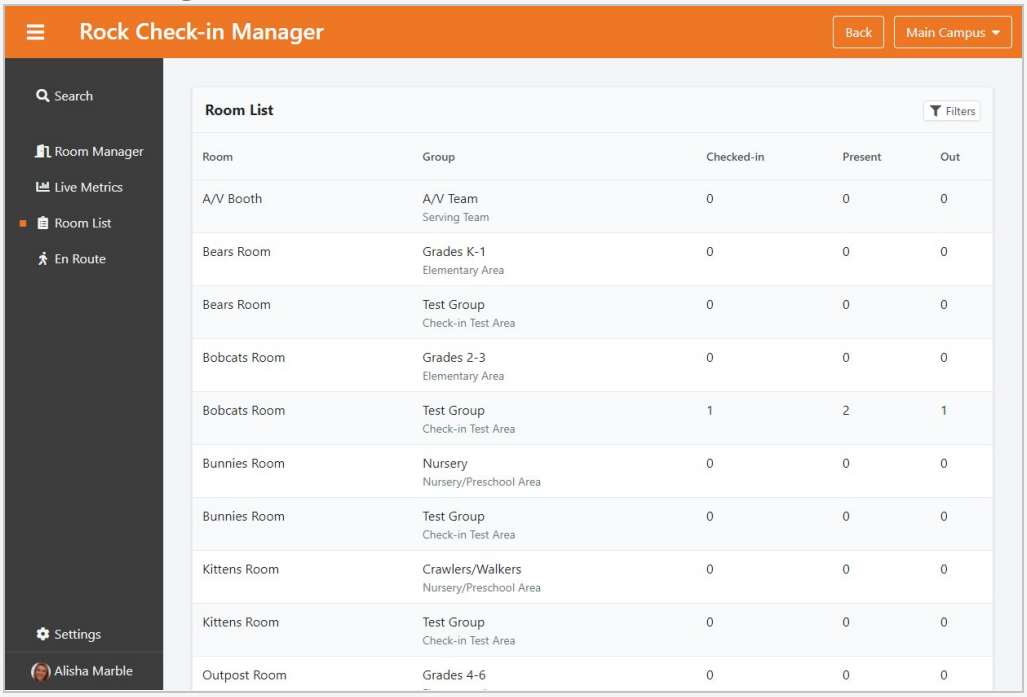
3. **Location Selection**
   The example pictured above shows us information for the Bobcats room. You can click here to navigate up in your check-in structure, to see metrics for a different room, or an entire group or area.

4. **Person Listing**
   At the room level we can see individual people with check-ins for that room. Clicking on any of the rows will bring you to that person's profile.

## Room List

The *Room List* is a great resource for seeing all of your rooms and their statuses at a glance. From here you can see the counts of how many people are checked in/present/checked out for each room. Clicking on any room will bring you to the roster for that room.

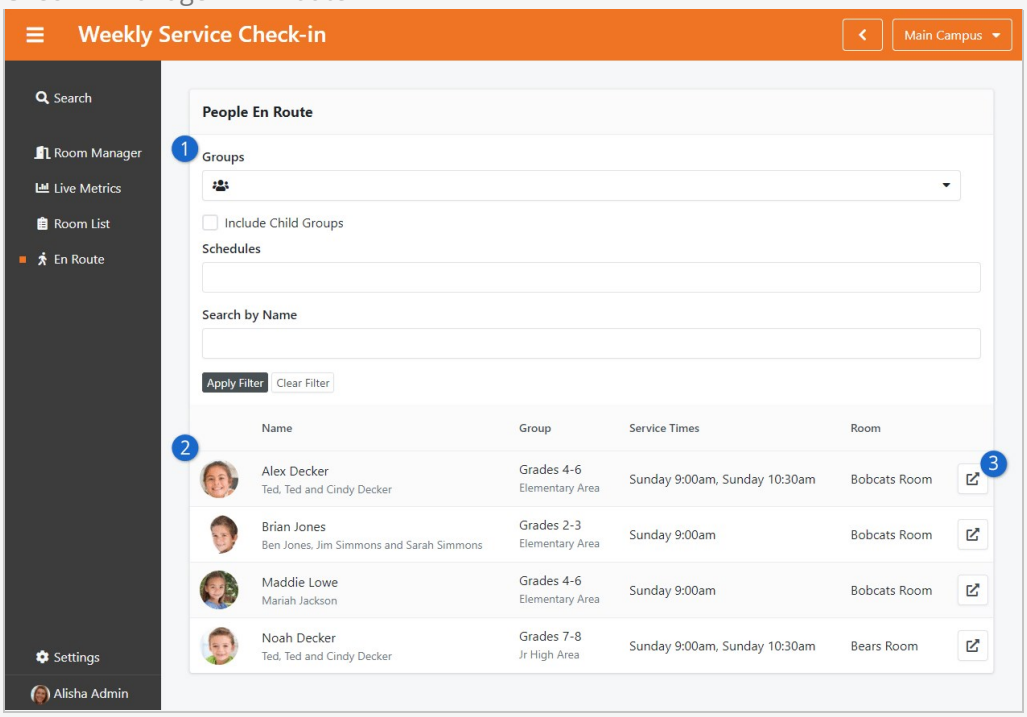
Check-in Manager - Room List




## En Route

The *En Route* page shows a list of people who are Checked In but not yet marked as Present. There are a few things to see and do on this page, as described below.

Check-in Manager - En Route




1. **Filters**
   You can filter the list of people by groups, schedules or names. Options for these filters can be found in the block's settings.

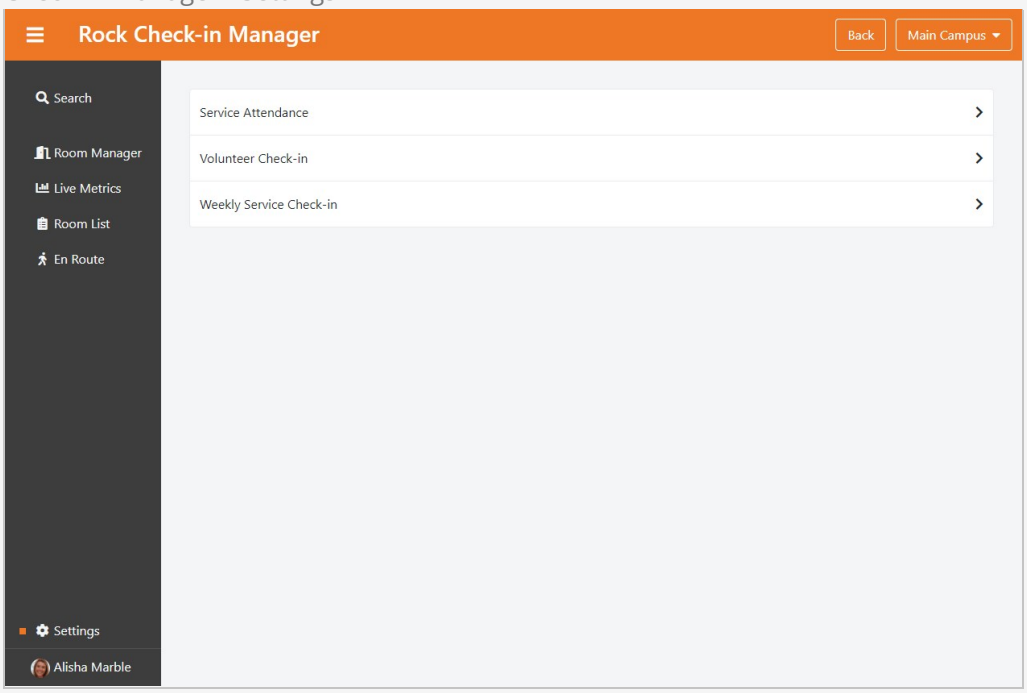
2. **En Route List**
   By default, this will be the list of people who have checked in and are not Present. This block can also be used to show people who are Present or Checked Out by changing the block's settings.

3. **Move Person**
   Clicking this button opens a modal that allows you to change the check-in for the person to another schedule, location or group. If the person is checked in to multiple services, you'll select which one to move.

## Settings

Lastly, you can select a different Check-in Configuration to view from the Settings menu. So far, in the screenshots above, we've just been working with the default 'Weekly Service Check-in' configuration.

Check-in Manager - Settings

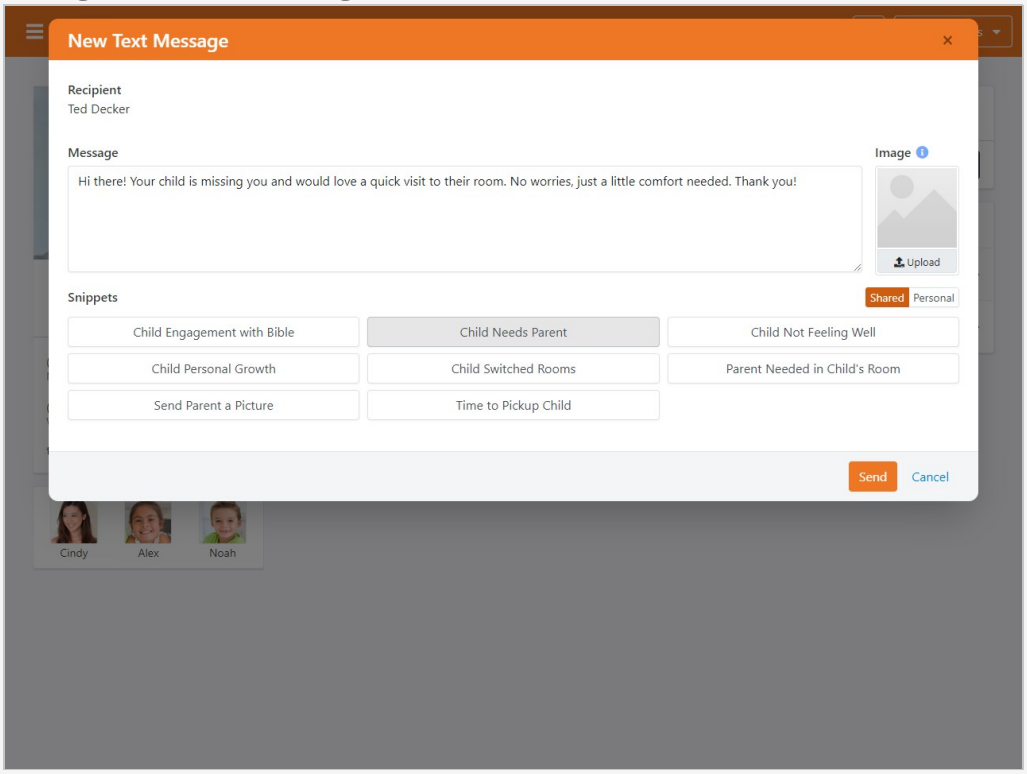



## Texting Parents from Check-in Manager

We've all been there—there's always that poor child in the nursery that just really *really* needs Mom or Dad. It's easy enough, using Check-in Manager, for a volunteer to look up the parents' information, but then what? Do they have to use their personal cell phone to text them? Well, not anymore.

The Person Profile block has a setting that lets you specify an SMS number to send texts from. Once that's configured, volunteers with access to Check-in Manager can send the parent a customized message. Or, if any are configured, they can also use a personal or shared SMS Snippet. Easy!

Texting from Check-in Manager




To access the messaging feature, click the SMS icon next to a person's phone number when you're looking at their profile in Check-in Manager. As pictured above, this will open a popup window where you can provide your SMS message or Snippet (the Snippet text can be modified) and hit `Send` to contact the person.

Here's what you need to make sure Rock is set up in order to make this work:

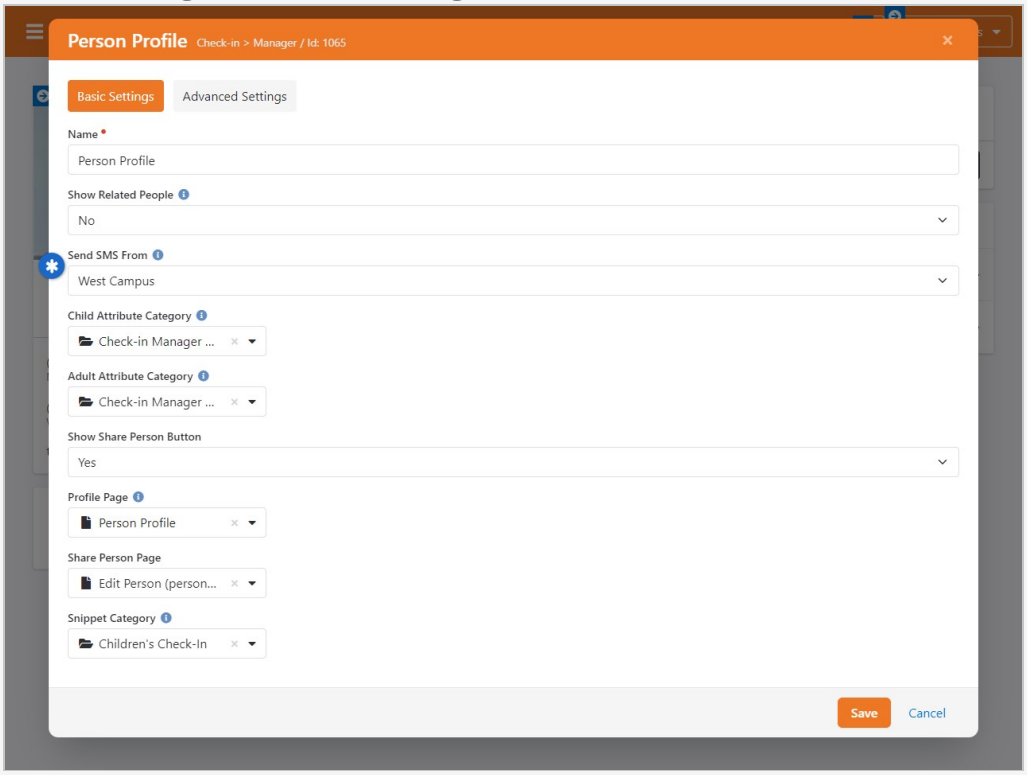
- The SMS Communication Medium needs to be enabled and configured with an enabled SMS Transport (see SMS: Twilio in the `Communicating with Rock` manual).

- As noted in the above link, you need to add at least one *SMS From Value* to your *Defined Values*

- You need to select the SMS number which will be used to send messages from Check-in Manager. To do this, go to `[yourrockserver].com/checkinmanager` and search for someone in your database. Click on their row to load the Check-In Manager Person Profile (the page in the above screenshot). The block settings for the block on this page include a *Send SMS From* setting (see image below) where you can choose one of your SMS numbers. Select one and click "Save".

- Finally, the person whose profile you're viewing needs to have a phone number with SMS enabled. If SMS is not enabled, you'll see their phone numbers listed and linked for calling, but you won't see the option to send them an SMS message.

## Check-In Manager Profile Block Settings

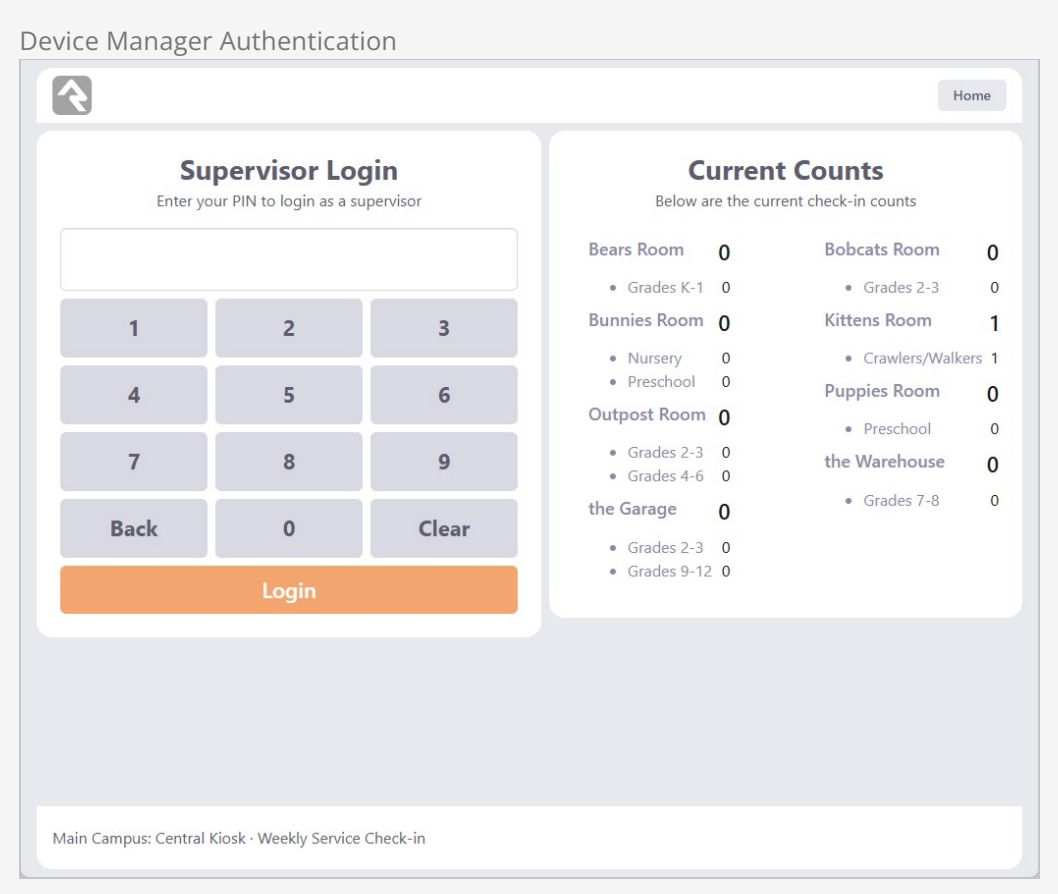


# Device Manager

While you can manage many aspects of a kiosk device from the *Check-in Manager* you can also manage the device from the actual kiosk. Below we'll discuss the various capabilities of these features.

## Logging In

To access the Device Kiosk simply press the gear icon at the bottom right of the main check-in screen. This will bring up the screen below.



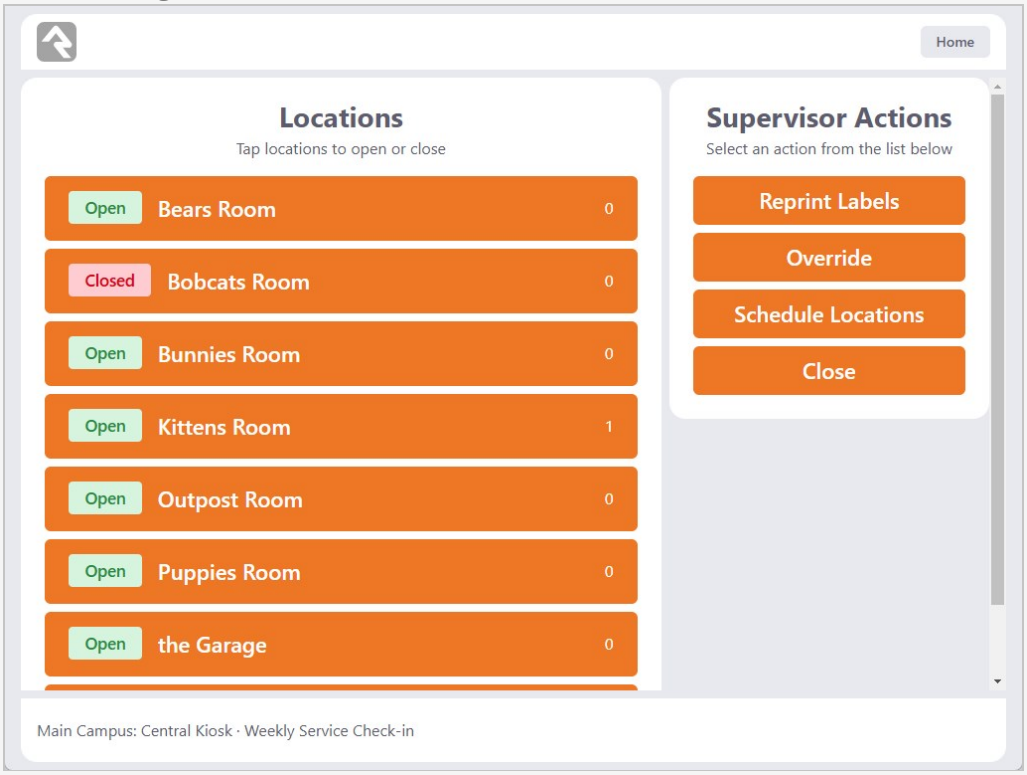

From this screen you can get a quick view of the counts for rooms configured to this kiosk. You can also enter your PIN to access the device manager.

> **Setting a PIN**
>
> To set a PIN for a person, go to the *Security* tab on the person's Profile and add a new User Account. Choose *PIN Authentication* for the Authentication Provider, and enter the desired PIN as the User Name.

## Device Manager

Once you're in the device manager you will see the screen below. This screen allows you to open/close rooms that have been configured for this kiosk. It also allows you to *Override* a child. This simply means that you can check-in a child to a room without considering the room's age or grade ranges. When you select the *Override* button you will see the standard *Search* screen. Everything will operate the same, but the room's configured age and grade ranges will be ignored.

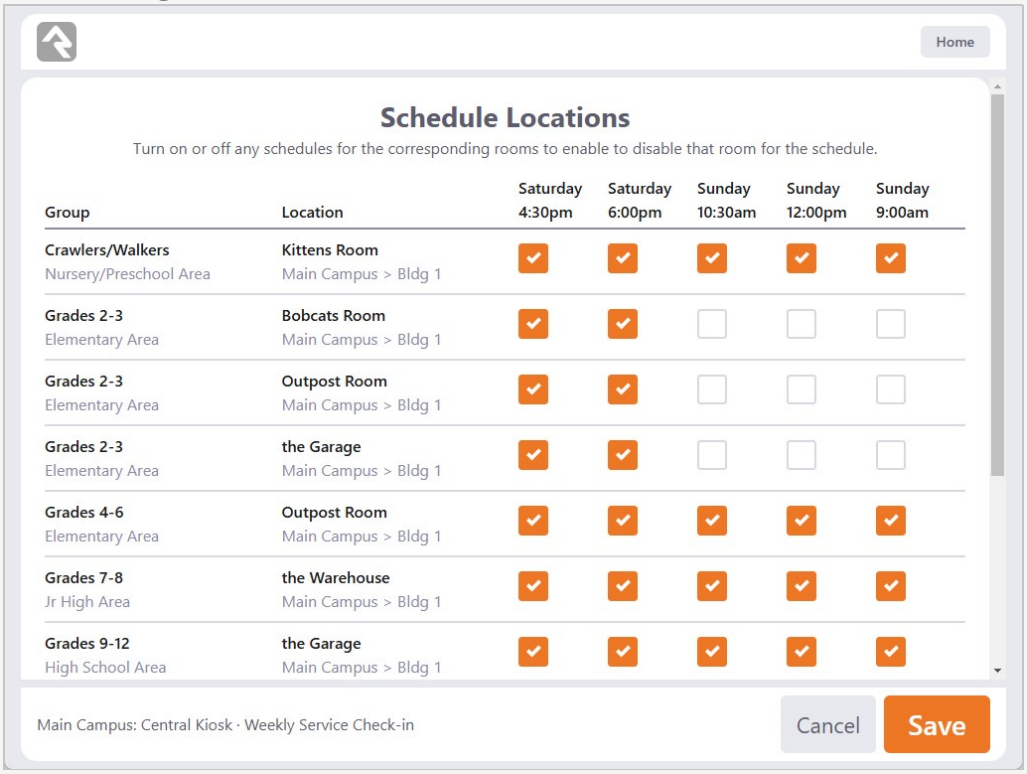
Device Manager




## Schedule Locations

From the main screen above you can also choose the *Schedule Locations* button. This screen allows you to alter the room schedules. This is normally done in the Rock Admin screens (`Admin Tools > Check-in > Check-in Configuration > Schedule`) but you can also enable/disable the schedules for the kiosk's configured rooms here too.

Device Manager Schedules



# Attendance Analytics

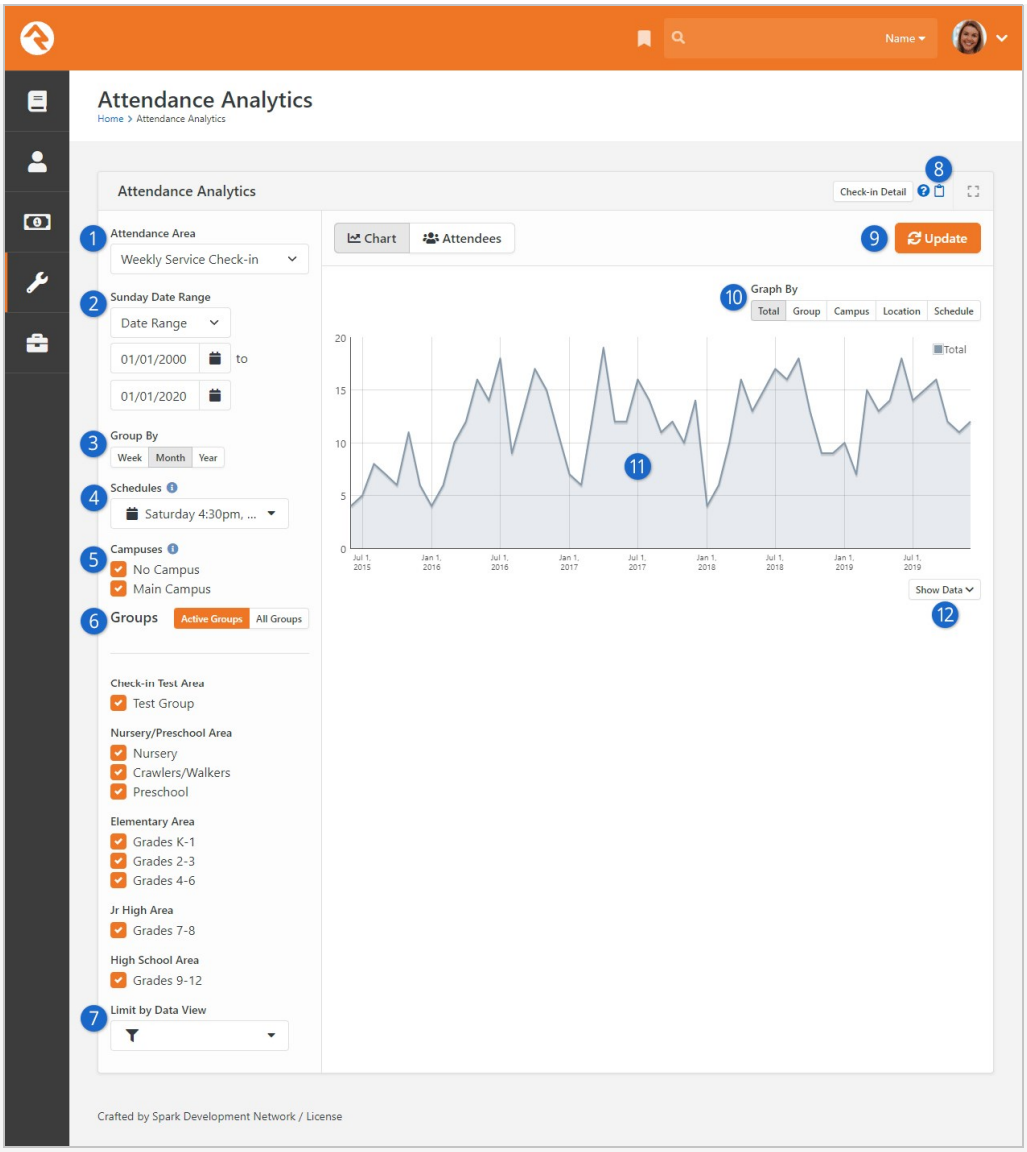
While there are a number of ways to access attendance data using Data Views and SQL reports, Rock also provides powerful analytics capabilities that you can access from `Tools > Reporting > Attendance Analytics`. This powerful tool should be able to answer any question you throw at it. Let's see what's possible.

This block operates in two modes: *Chart* and *Attendees*.

## Chart Mode

When in chart mode, the analytics block will report back the count of the attendees who match the criteria you've provided. This is great when you're looking for numbers for a specific weekend or viewing attendance over time.

Chart Mode




1 **Attendance Area**
The first step is to select the kind of attendance that you'd like to report. Most often you'll probably be interested in check-in data, so select *Weekly Service Check-in*.

2 **Date Range**
The most important criterion you will provide is the date range. This date range picker is very powerful and allows you to select many different types of date ranges. To help reduce confusion, the label above it shows the exact dates that are currently being used for the filter.

3 **Group By Setting**
This determines how the attendance data should be grouped for the graph. Typically, this will be by week, but you may want to get a monthly or yearly graph too.

4 **Schedules**
Use this dropdown menu if you want to filter by specific schedules, such as only Sunday morning services. Select multiple times or events by clicking on them. Leave it blank if you don't want schedules to be included in your filter.

5. **Campuses**
   If your church has multiple campuses, you can select the one you're currently interested in.

6. **Groups**
   Next you can filter which check-in groups (usually age ranges) you'd like to view in your analysis. If your organization has a lot of groups, you can change the block settings to display your groups as a dropdown menu, which makes finding and selecting groups easier. To learn how to change this display, see Configuring Attendance Analytics Block Settings below.

7. **Limit By Data View**
   This is an advanced setting that allows you to apply even more filter options to your criteria. For instance, let's say you only want to report on *girls*. You could easily make a data view with this gender filter and use it here to only show girls.

8. **Copy Link**
   Did you configure the attendance analytics block to provide the perfect snapshot of your attendance? Want to share that with a colleague? The *Copy Link* button lets you do exactly that.

9. **Update**
   Since the block has to crunch through a ton of data to show its results, the graph will only refresh when you click the `Update` button.

10. **Graph By**
    Sometimes you may want to only see one series on your graph (the *Total* option) but other times you'd like to see multiple series. This setting allows you to configure what types of series you'd like displayed.

11. **Graph**
    Yep...this is the graph.

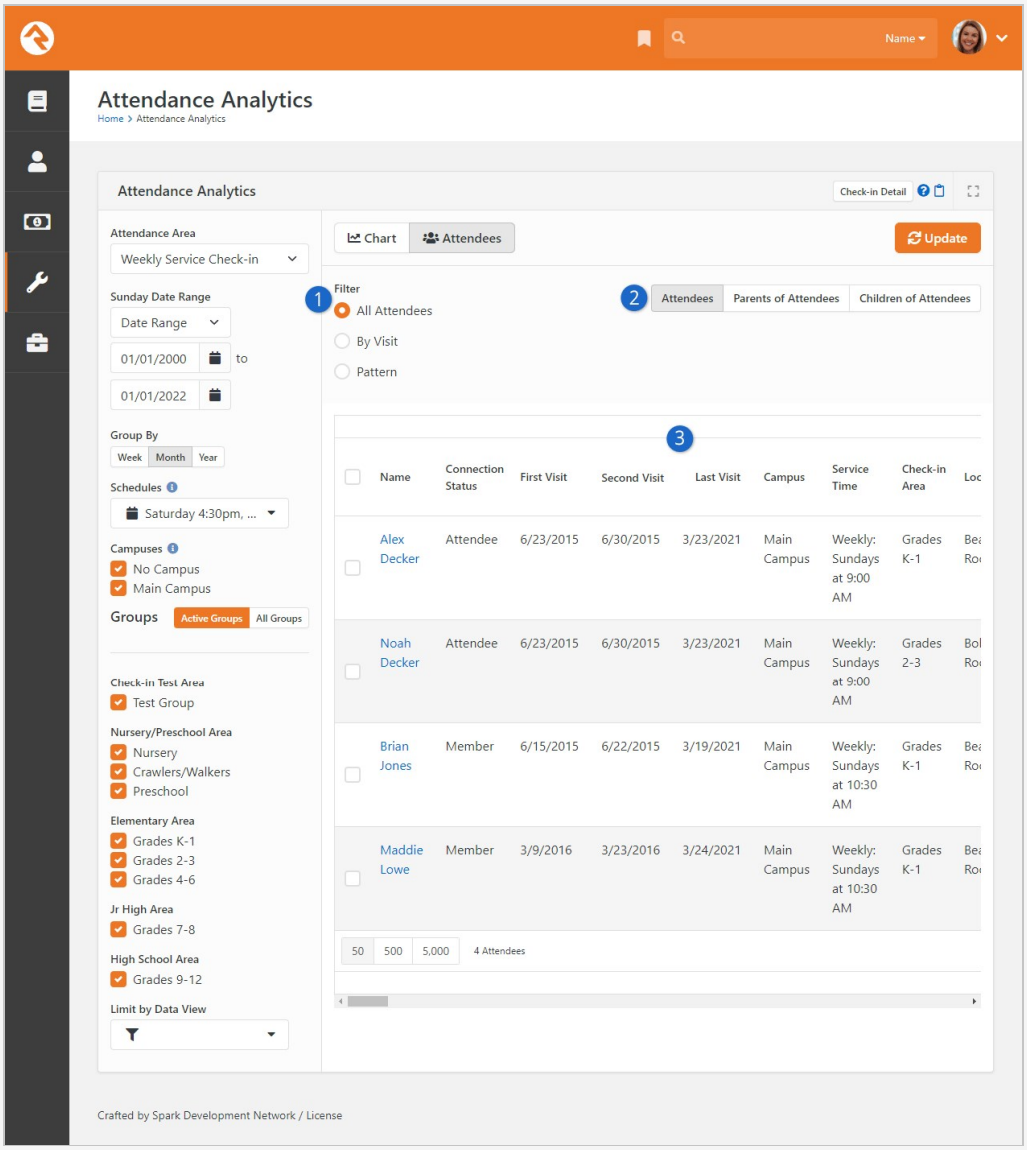
12. **Show Data**
    Sometimes you want a pretty picture, other times you need raw data. The good news is that you can have both!

## Attendee Mode

Now that you see how you can see how to get numbers, let's look at how you can see the individuals who make up those numbers. Clicking the `Attendees` button will hide the graph and show you the individuals behind the data.

Much of the block works in the same way as the graph mode, but here are a few of the differences.

## Attendee Mode




1. **Filter**
   The filter allows you to show all the attendees or special attendees. We discuss these filters in detail below.

2. **Return Type**
   Sometimes you want the attendees (usually children) but other times you want to convert the list to the parents (or children) of the attendees.

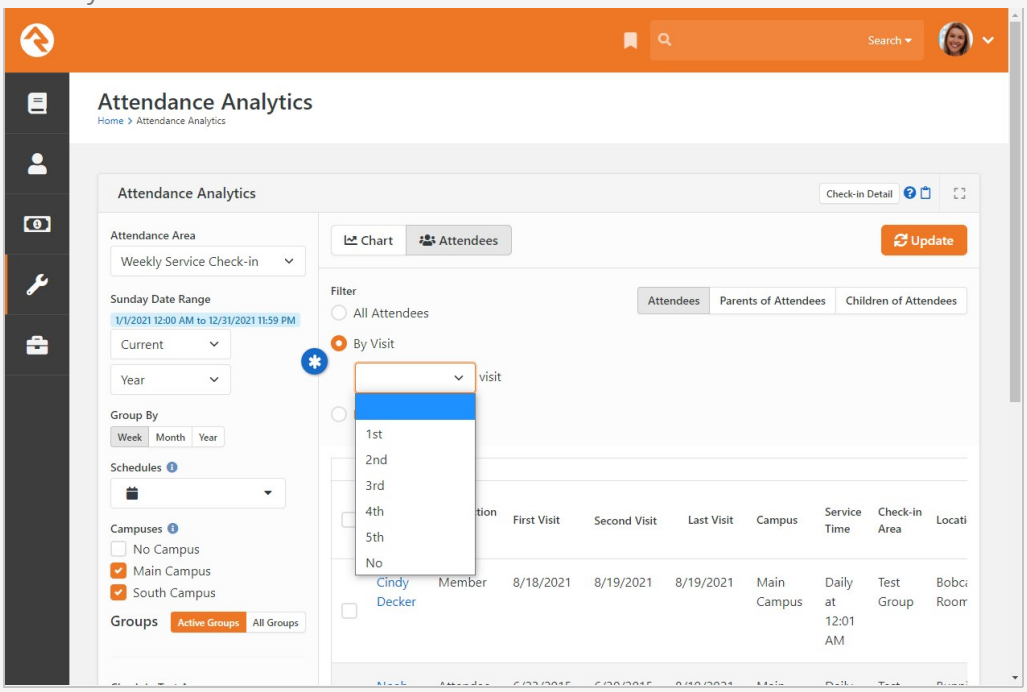
3. **Columns**
   If you look carefully, you'll notice that the number and types of columns change based on your criteria. Normally you'll see a column for each week in the date range with a checkmark if they attended that week. If you select *Group By* month or year however, it will show a column for that period type instead.

## Filters

### By Visit

Many times, you'll want to filter out only the first-time visitors. That's easy! Just use the *By Visit* filter. You can select from the first to fifth visits.

Filter By Visit




Note that the date range is important to this filter. It will show anyone who has had a first visit during the provided range.

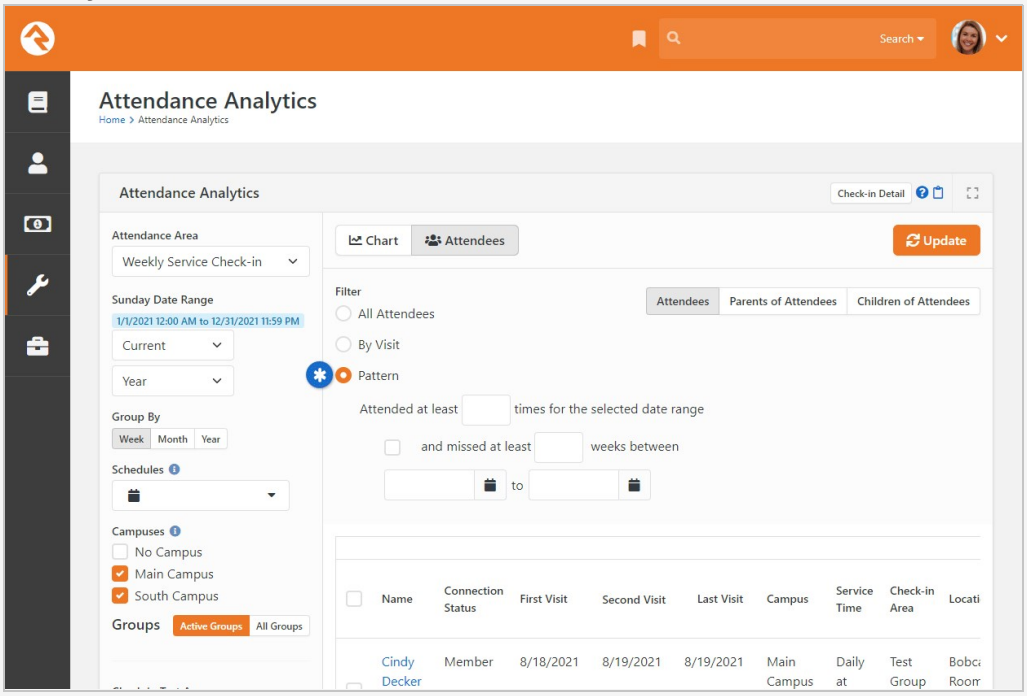
You'll also notice a *No* visit option at the end. This will show members of the selected groups that did not attend at all during the selected date range. Keep in mind though that children are not members of most weekend service groups. This option is more for small groups or service groups that children are members of.

> #### Ministry Idea
>
> Hopefully you're already seeing that this filter provides an easy way to send emails or letters to parents of first-time visitors.

### Pattern

Perhaps you want to find kids who have stopped coming or maybe who come often. The pattern filter can help with either case.

Filter By Pattern



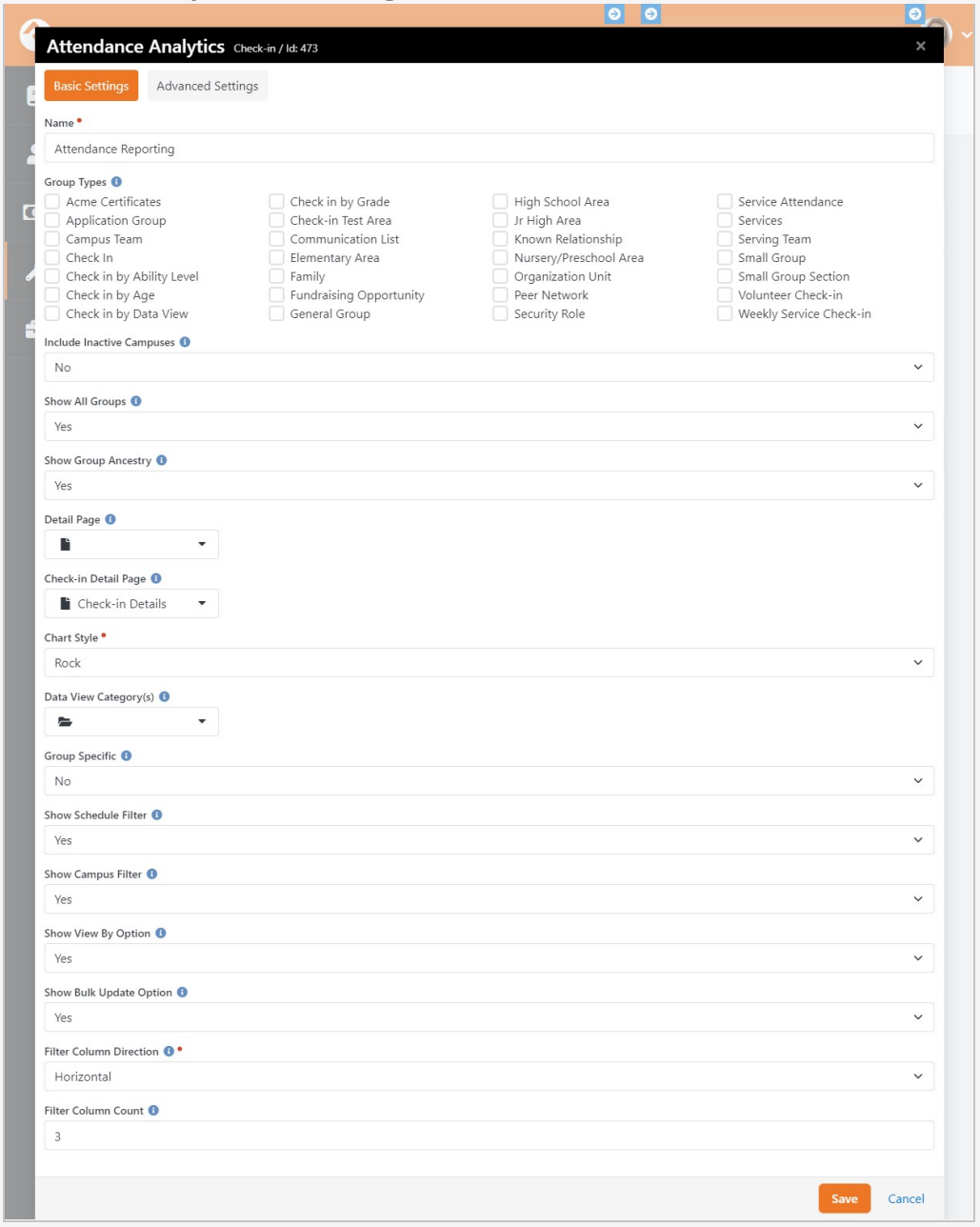

As you can see, you can filter by certain attendance and non-attendance patterns.

## Configuring Attendance Analytics Block Settings

You can configure the Attendance Analytics block to service other types of check-in scenarios, such as volunteer or serving team check-in. In the Group Types section, select which group types you want to use for your analytics. Ensure that the group type you select is a top-level type that contains the groups you wish to report on.

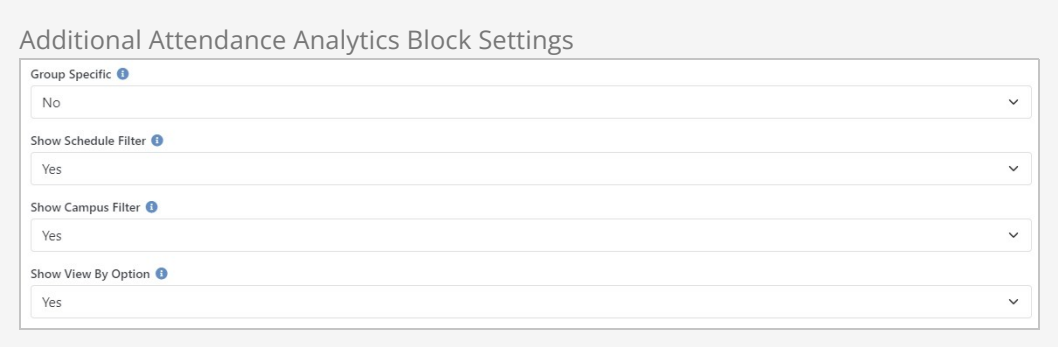
Attendance Analytics block settings is also where you can choose whether to display all of the groups in your organization as a list on the screen, or to use a group dropdown menu instead. If you want to use a dropdown menu, select No in the Show All Groups field.

Attendance Analytics Block Settings




## Attendance Analytics for Specific Groups

There are additional *Attendance Analytics* block settings that allow you to filter data by a specific group ID, as well as additional display options. This option is intended for group leaders to use as part of their Group Leader toolbox.



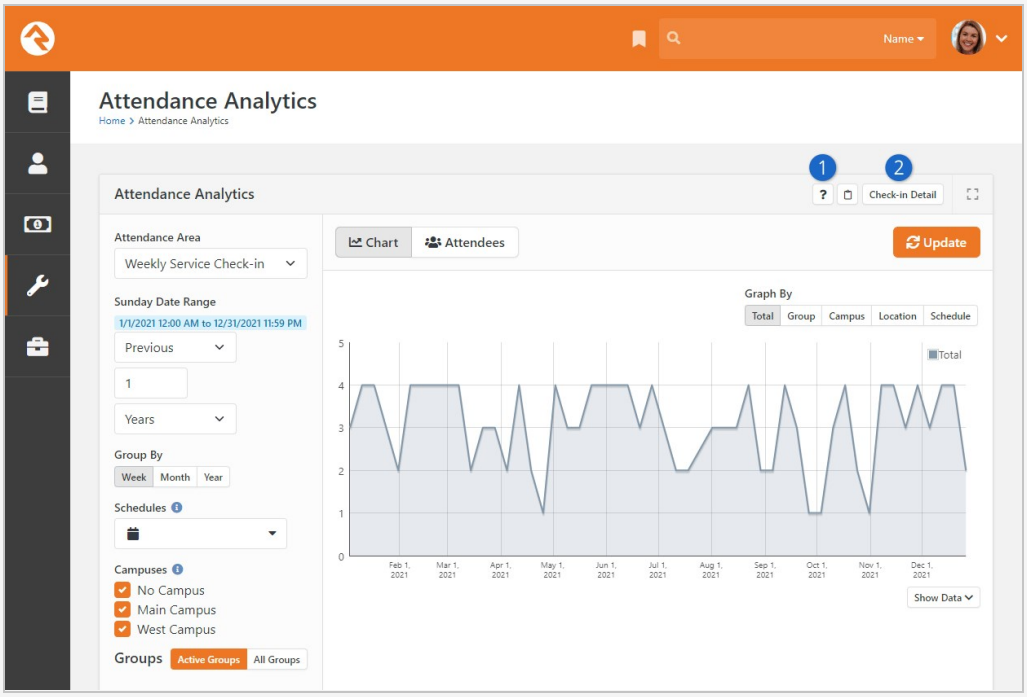

Selecting "Yes" in the *Group Specific* field will tell the block to only display attendance for a single group, passed to the block through a query string in the URL (e.g. `?GroupId=123`). When a group ID is used, the *Merge People*, *Bulk Update* and *Merge Document* options on the *Attendance Analytics* screen will be hidden.

The *Show Schedule Filter*, *Show Campus Filter* and *Show View By Option* settings give you control over whether or not these options are displayed on the *Attendance Analytics* screen.

## Final Pieces

We have a couple of final items to mention, both of which can be found at the top of the Attendance Analytics screen.

## Final Pieces




1 **Help**
We've provided a lot of built-in help to this block to assist you in remembering all of these details. When in doubt, open this panel up.

2 **Check-In Detail**
This button will take you to the attendance data that drives the analytics. This allows you to edit the data.

# Printers

Rock's check-in requires the use of specific Zebra printers. Since most models have many SKUs/options, you'll want to be careful when ordering to specify the exact model number that includes the features you need. Working with a vendor that specializes in Zebra printers is often better than "going it alone" and Googling for the cheapest price. Rock has been tested on the following models:

1. **ZD421d/621d** - These are our currently-recommended models (the ZD421d in particular). The cutter module (which we highly recommend) is purchased separately and is user-installable (as is the ethernet port), unlike earlier models. Make sure you purchase the *d*, not *t*— very few (if any) churches need thermal-transfer capability. These models are available with very good dual-band Wi-Fi. The ZD621d is a little faster, but significantly more expensive.
2. **ZD500** - This model (now discontinued) is more expensive than the others as it can do direct thermal *and* thermal transfer, and also comes with Ethernet and dual band 802.11n Wi-Fi. It can be ordered with or without a cutter, but the cutter is not user-installable after the fact. This is a large printer, as it needs to accommodate the thermal transfer roll mechanism, but is proving to be a workhorse in many organizations.
3. **GX420d / GK420d** - Now discontinued, these are de facto standard desktop printers used in countless check-in systems. While they were available with (now) horrible 802.11g Wi-Fi, we do not recommend using that mode with Rock due to the lack of stability with 802.11b/g. That said, if you have them, they still work great via USB (only supported by the Windows check-in client) and Ethernet.
4. **QLn series** - These are battery powered mobile printers for specialized applications (read: you need to walk around with it).
5. **LP2844-Z** - These oldies but goodies have been replaced with newer models, but if you still have them, they should work (although this model does not support extended-character printing). Oh, and the 'Z' in the name is really important, as a plain-old LP2844 doesn't talk ZPL, which is necessary for Rock.

While it's highly likely that other Zebra models could work (technically any printer that supports ZPL should work) we've only tested with the models above.

We recommend that when purchasing these Zebra printers, you get ones with built-in Ethernet ports and/or Wi-Fi. This allows more flexibility such as printing from the server (when self-hosting) or the iPad app. If you currently have models that do not have Ethernet or Wi-Fi, you will need to use the Windows client to enable printing via USB. Some models also support Bluetooth LE, which Rock supports *only* via the iPad app.

Bluetooth is a good option if you want to use iPad clients *and* your printers are not networked via Ethernet or Wi-Fi (or the local network does not allow Wi-Fi clients to talk to each other.)

We also *highly* recommend printers with cutters, as this eliminates 99% of the jamming problems you get when visitors have to manually tear-off labels. However, we **do not** recommend trying to mix cutter and non-cutter printers within the same system. It's technically possible to do so, but you have to do some hacky things to make such a system stable.

> ### Resolution Matters!
>
> It's important to know that several Zebra models are available as different SKUs in 203dpi or 300dpi resolution. These are not like laser printers that can print at 1200, 600, or 300dpi and look great... it is the literal *physical* resolution of the print head.
>
> It might be tempting to assume 300 is better than 203 and you should automatically go with that but realize that the labels that ship with Rock are designed at 203dpi and if you try to print them on a 300dpi model, they will look too small. There is no way to fix this other than to re-design the label at 300dpi in ZebraDesigner. Thus, **our recommendation is to stick with 203dpi models** (which cost less, anyway) and only go 300dpi if you plan on creating your own labels **and** want the extra resolution for things like printing photos on the labels (though photos look decent at 203, too).
>
> We'll also mention that because of the way labels are designed for a specific resolution, it is not practical to mix 203dpi and 300dpi printers in the same system. Whatever you do, pick a resolution and stick with it for every printer in your system. Your future sanity will thank you.

> ### Other Printer Vendors
>
> While we may add support for other print vendors in the future, we currently support only Zebras. Based on our long experience with check-in systems, we feel that they are the best option. While purchase price can be more expensive than other makes, you'll find that their total cost of ownership will be less over time. Zebras are built to last for many years and their labels can be purchased for much less than other vendors. (The difference in labels alone can make up for the difference in printer price in less than one year.)

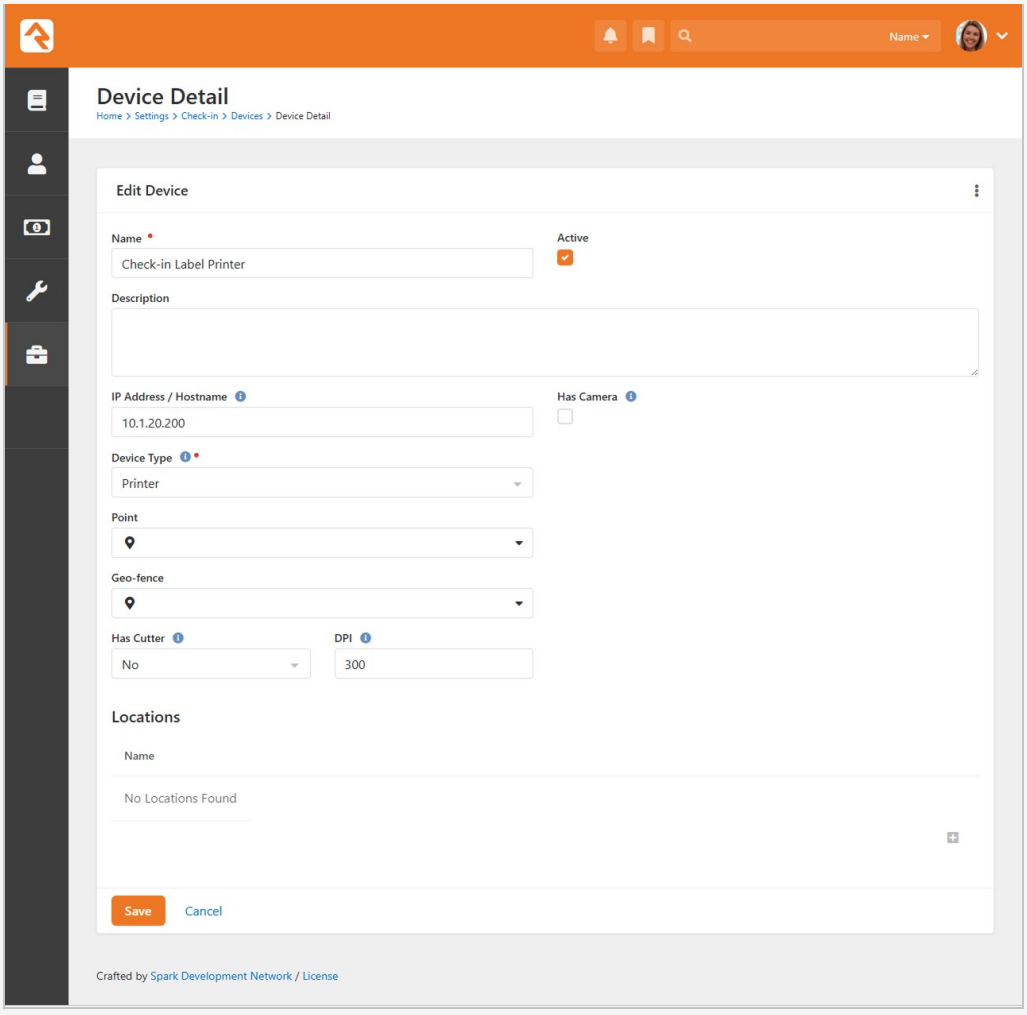
## Defining Printers in Rock

> **For Simplified Printing**
>
> If you are using the simplified printer setup where you are printing from the client and specifying the printer in the iPad or Windows application, you do not need to define the printers in Rock.

To add printers in Rock for selection when configuring locations, group-types or kiosks, follow the steps below:

1. Navigate to the Devices page under `Admin Tools > Check-in > Devices`.
2. Select a printer device to edit or add a new printer.
3. From the device details screen:
    a. Give your printer a name.
    b. Provide the IP address for your printer.
    c. Select the device type of *Printer*.
    d. Set your *DPI* to the selected printer's resolution.

Printer Details




Now that your printers are defined, you can configure them to be used on either

locations `Admin Tools > Check-in > Named Locations` or kiosks `Admin Tools > Check-in > Devices`.

# Check-In Relationships

There will be times when you'll want to allow individuals outside of a family to check in children. To make this easy, Rock allows you to add relationships between individuals.

## Known Relationships

From a *Person Profile* page, you can define *Known Relationships*. The *Allow Check In* relationship allows you to grant check-in rights to a person outside of a child's immediate family.

To add a known relationship to an individual, complete the following steps:

1. Go to the *Person Profile* page for the child.
2. Click the [+] button on the *Known Relationship* block.
3. Select the *Relationship Type* of *Allow Check-in by*.
4. Select the person who should be allowed to check the child in.
5. Click the `Save` button.

After following these steps, anyone in the family of the person you selected will be allowed to check in the child. You may notice that the inverse relationship (can check in) is automatically added to the adult.

## Adding Check-In Abilities to Other Known Relationships

Rock ships with several other *Known Relationships* such as grandparent, step-parent, etc. Out-of-the-box these relationships do not have check-in rights applied to them. You can easily change that behavior by following the steps below:

1. Navigate to `Admin Tools > General Settings > Group Types > Known Relationship`.
2. Select the role you would like (under `Roles`) to add check-in capabilities to.
3. Select `Yes` under `Can Check-in`.
4. Click the `Save` button on the role dialog and then `Save` again on the *Group Type* screen.

# Check-In Kiosk Options

The easiest way to run Rock's check-in system is to simply open a web browser on a desktop or tablet and navigate to `http://[yourserver]/nextgen-checkin`. Rock also provides a native iPad application and a Windows application. Let's explore the different strengths of these three platforms.

| Platform | Print From Server | Local Network Printing | Local USB Printing | Bluetooth printing | Notes |
|---|---|---|---|---|---|
| Browser-Based | X | | | | The easiest method for running check-in, but all printing must be done from the server. (This will only work if your server is on the same network as the printers or you are using the Rock Cloud Printing feature.) |
| iPad Application | X | X | | X | This application is available for free from the Apple App Store. The application provides a simple tablet interface to the Rock check-in system. It also allows you to print directly from the iPad to a networked printer, allowing the server to be hosted remotely. |
| Windows Application | X | X | X | | The Windows check-in application can be downloaded from `Admin Tools > Power Tools > External Applications`. This application allows you to print to a USB-connected printer as well as network-based printers. |

> ### Externally Hosted Servers
>
> If your Rock server is hosted outside your organization, you will need to use the iPad application / Windows application to enable local printing, or the Rock Cloud Printing feature.

## iPad Application

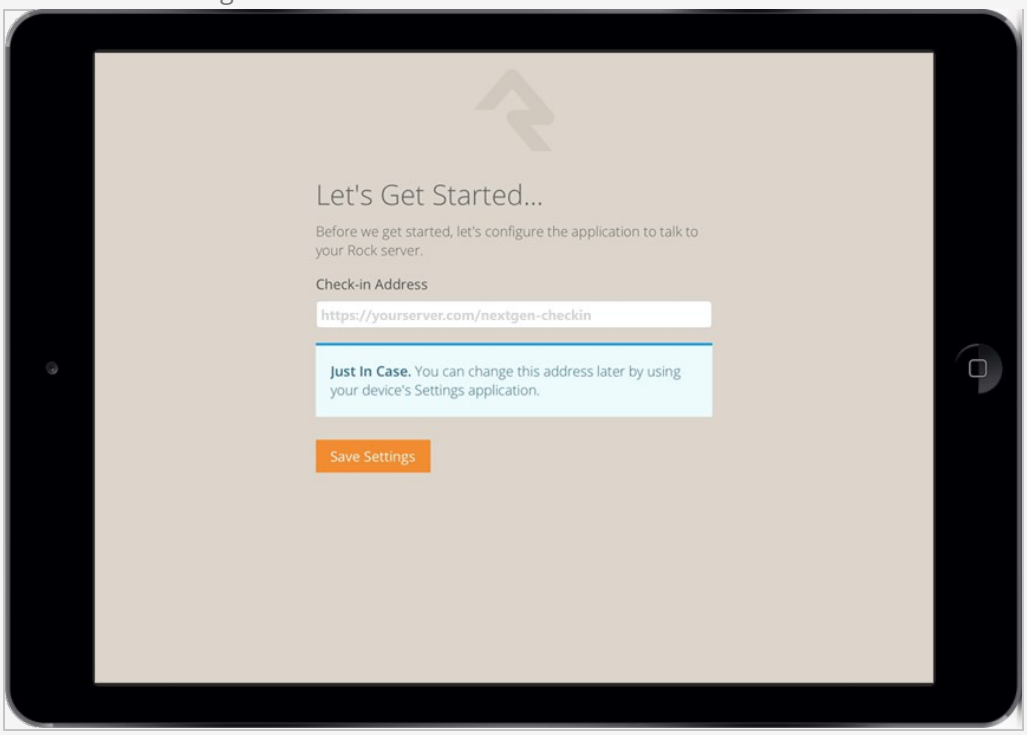
While the normal check-in screens run really well in mobile Safari, we have created a native iPad application to host the check-in experience. This application can be downloaded for free from the Apple App Store. The application displays the same Rock check-in screens as the browser but also adds the ability to print straight from the iPad to your network-connected printers. The application can also cache the labels, which increases check-in performance.

> **Note**
>
> As of Rock v9, the iPad app only runs on **iOS 10** or newer, which means very old hardware like the iPad 2/3 and original iPad Mini will no longer work.

### Configuration

After installing the application from the App Store and running it for the first time, you'll be prompted to enter the address of the check-in start page you want to use for the application. For most organizations this address will be `https://[your-rock-server]/nextgen-checkin`.

iPad Launch Configuration

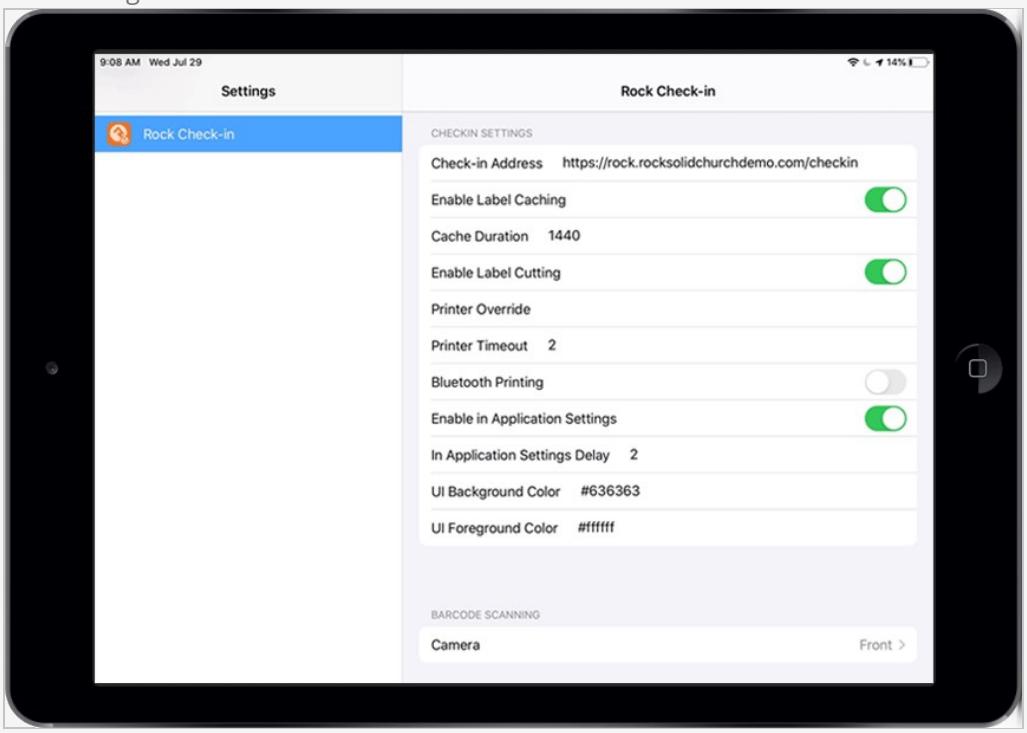


### Navigating Complex Configurations

Organizations with multiple check-in configurations might want to point to a simple navigation page that allows the individual to select the check-in configuration on load.

Once you provide this address, all subsequent launches will load this address on startup. If you want to modify this address later, or access advanced configuration settings, you can select `Settings` on your iPad and scroll down to the `Rock Check-in` application settings. From there you can adjust the following settings.

iPad Configuration




| Setting | Description |
| --- | --- |
| Check-in Address | This is the initial page that will load when the application launches. |
| Enable Label Caching | This setting will cache the loading of check-in labels, which keeps them from being downloaded on each check-in. |
| Cache Duration | This determines how often the labels will be re-downloaded. The cache can also be expired by stopping the application and restarting. |
| Enable Label Cutting | If your label printer has a cutter, enable this feature to automatically perform cuts at the end of each set of labels. See the Printing chapter above for more information. |

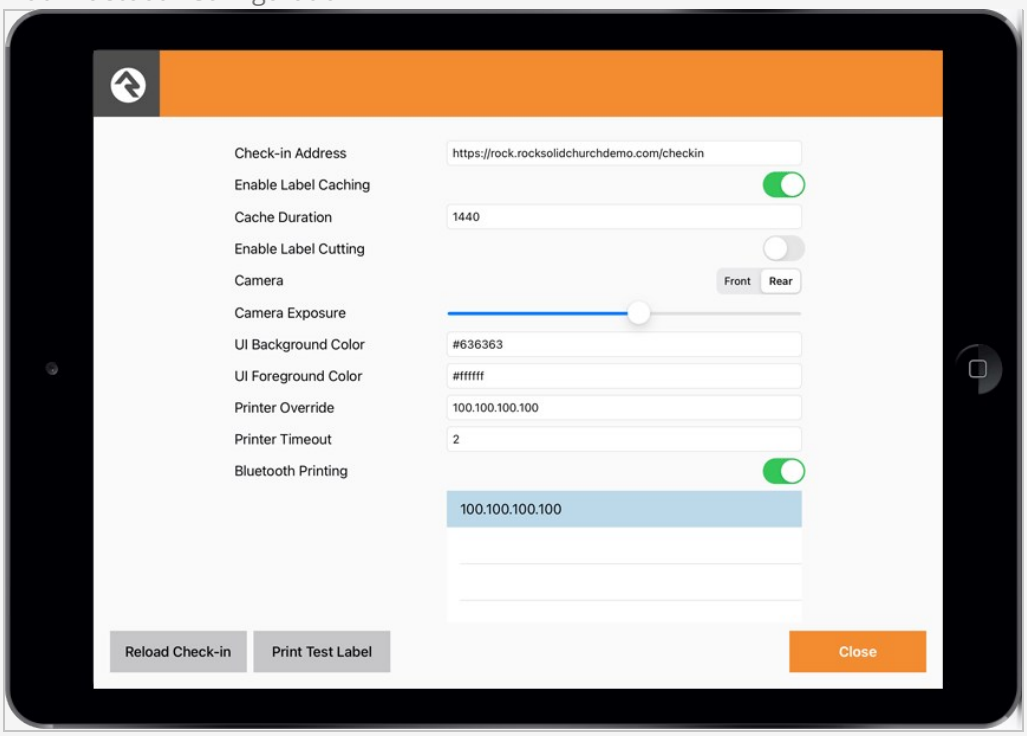
| Setting | Description |
| --- | --- |
| Printer Override | This setting has the effect of always printing from the iPad to the printer IP address you provide. |
| Bluetooth Printing | Determines if the Printer Override setting contains a Bluetooth printer name or an IP address for Wi-Fi printing. |
| Enable in Application Settings | Enables or disables the 5-finger long press gesture to get to the in-app settings screen. You can also change how long a person needs to press before the settings screen appears. |
| UI Colors | You can easily customize the background and foreground colors of the interface by adjusting these settings. |
| Camera | Select whether the iPad should use the front or the rear camera for scanning barcodes. You can also adjust the exposure if the image is too bright or too dark. See the iPad Barcode Scanning section below for details on enabling this feature. |

### Bluetooth Printing

The iPad Application supports Bluetooth Low Energy printing to supported Zebra printers. As of this writing, these are the ZQ300, ZQ500, ZD400, ZD600 and ZT600 series printers. Zebra also has some older “Bluetooth Classic” printers, but these are not supported. If you are thinking of buying Bluetooth printers, try just one first to make sure everything works before you buy them all. To configure the use of a Bluetooth printer you need to use the in-app settings screen.

While you are in the Rock Check-in app, press five fingers on the screen for two seconds to access the settings screen pictured below. When you enable Bluetooth Printing, a list will appear that contains nearby Bluetooth devices. Select the name of the Bluetooth printer and it will auto-fill the Printer Override setting for you.

iPad Bluetooth Configuration




You may have noticed the *Print Test Label* button pictured above near the bottom of the screen. This feature is enabled if you have a Bluetooth printer name or an IP address in the *Printer Override* field. Tapping this button will print a simple test label to verify the connection to your printer.

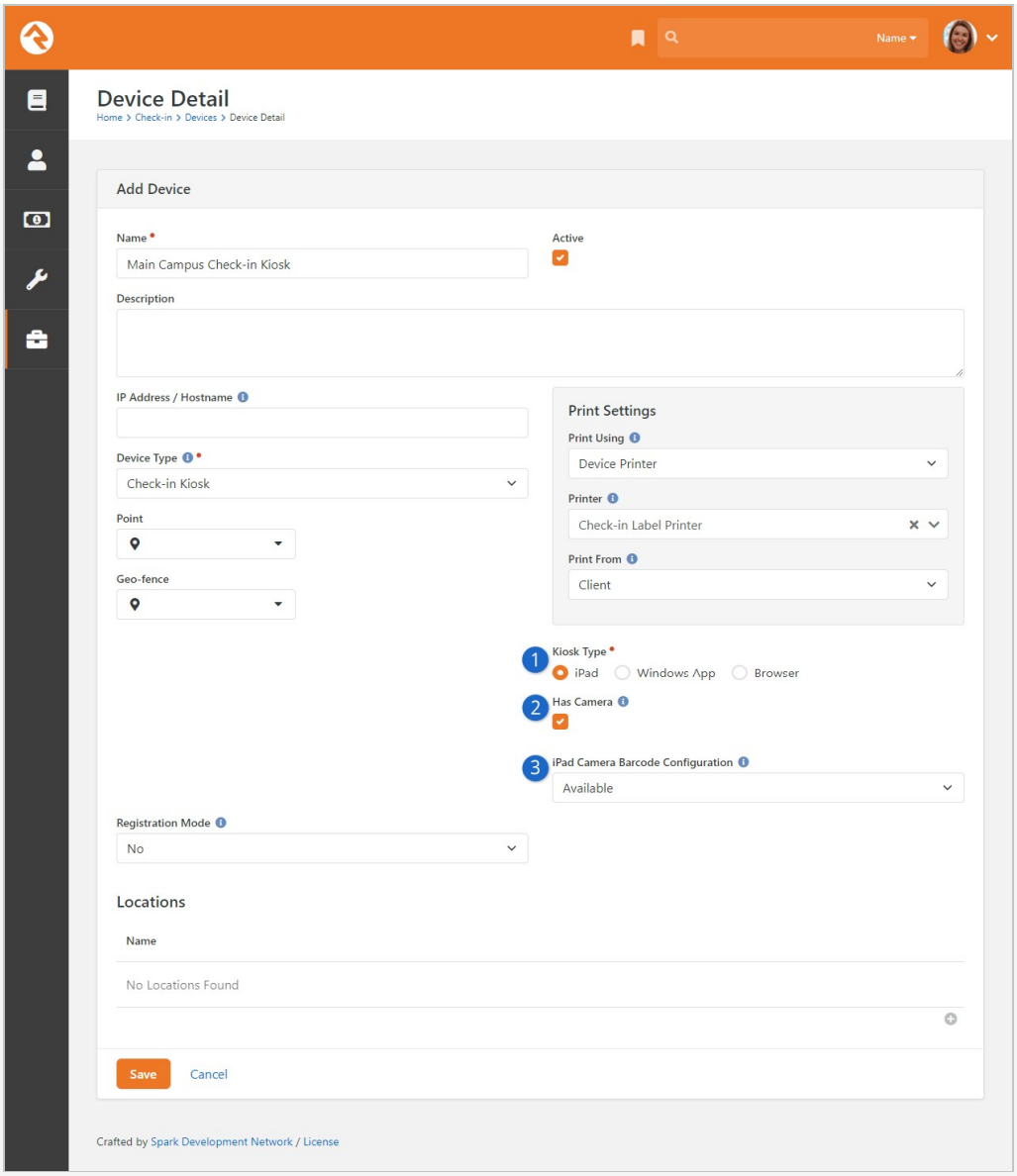
> **Note About iPad Restrictions**
>
> It's not uncommon when using iPad kiosks to "lock down" the iPad as much as possible via the use of iPad Restrictions, to prevent individuals from changing the configuration or using it in a way that wasn't intended. We have discovered a minor issue in iOS 10 where restricting the use of Safari Browser prevents the Rock check-in app from working properly. (Check-in worked fine in iOS 9 and earlier.) So be aware that you won't be able to disable the use of Safari when running iOS 10 or newer if you want the Rock app to function.

### iPad Barcode Scanning

You can use an iPad's built-in camera to scan barcodes or QR codes for check-in. This speedy option is easy to set up and comes with a variety of customization options.

To start, make sure that you have at least one *Device* set up with the camera feature enabled as shown below. See the Configuring Kiosks section for full details on setting up a *Device*. Remember, a single *Device* configuration can be used on multiple physical machines at the same time.

Device Camera Setup




1 **Kiosk Type**
In this case, be sure iPad is selected as the Kiosk Type.

2 **Has Camera**
This option must be enabled to use a camera for scanning barcodes or QR codes with the selected *Device*.

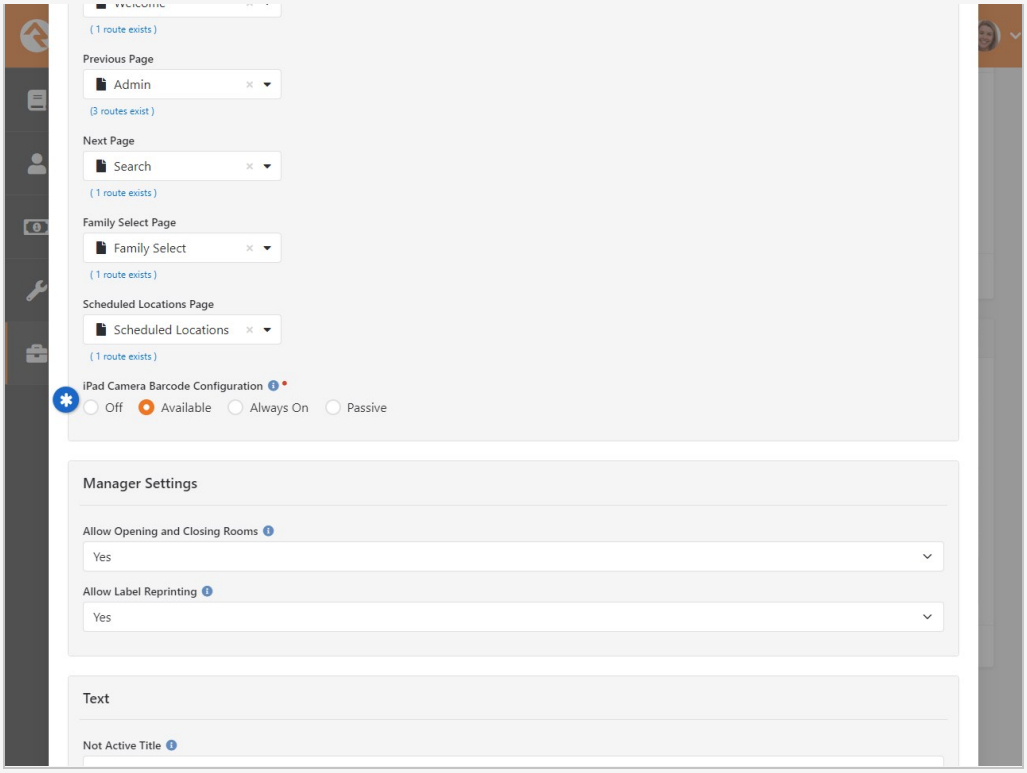
3 **iPad Camera Barcode Configuration**
Select the camera configuration setting that applies best to how it will be used:

- **Off:** If selected, the camera will be off and can't be used for check-in.
- **Available:** This will add a button to the *Welcome* screen, allowing the person to choose between scanning a code or providing a phone number to proceed with check-in.
- **Always On:** Select this option to require scanning for every check-in. The camera feature will activate immediately when the *Welcome* screen is accessed.
- **Passive:** With this setting the camera is always on, but the camera view isn't shown on the screen. In this case, the individual will have to

know to place the barcode into the camera's field of view.

If a *Camera Barcode Configuration* option is not chosen in the *Device* settings, then the Welcome block's settings will be used by default. Those settings can be changed by navigating to `Admin Tools > CMS Configuration > Pages > Check-In > Welcome` and editing the Welcome block.

Welcome Block Settings



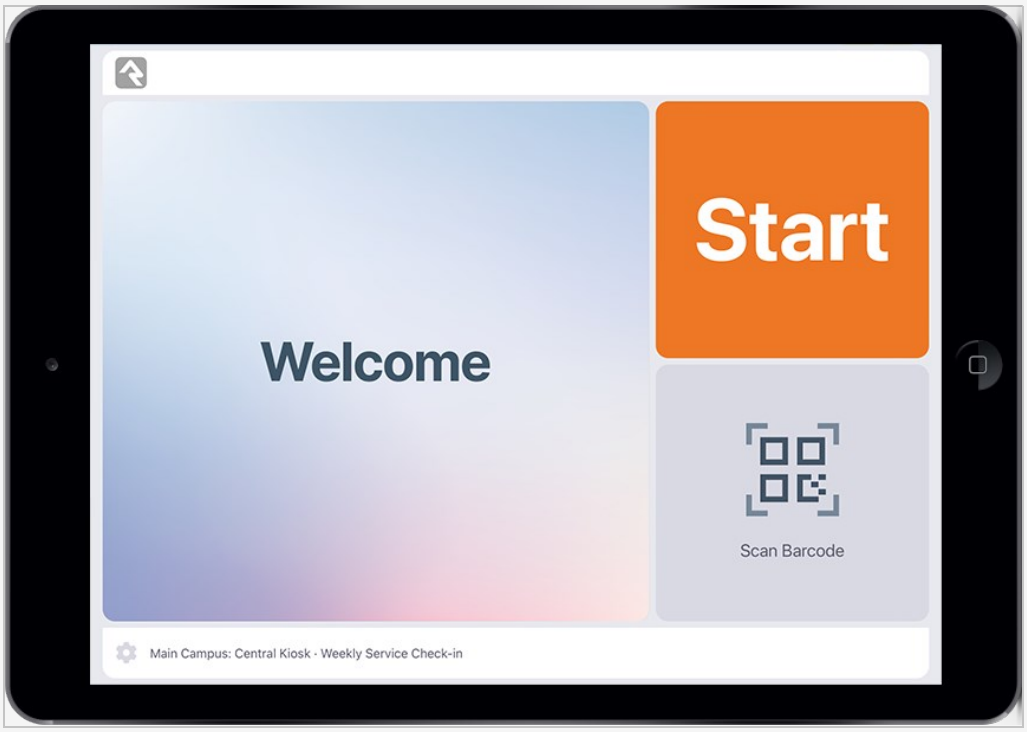

### In-App Camera Settings

There are more camera options you can set within the iPad application itself. See the Configuration section above for details.

Now that Rock knows about your camera, you're ready to start using it.

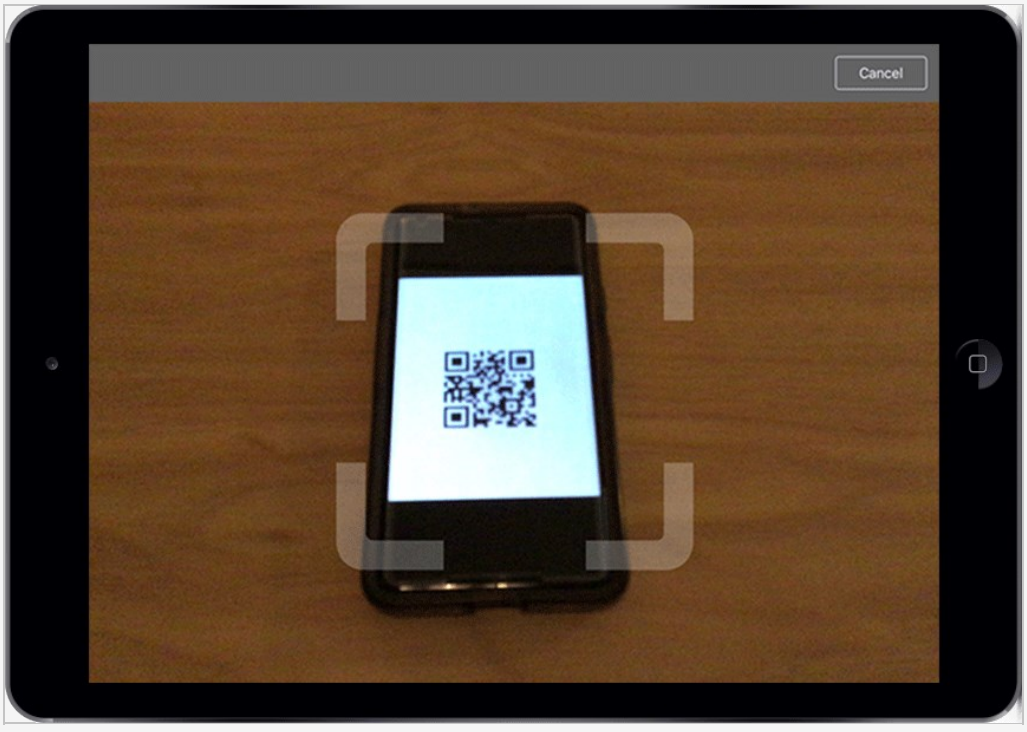
If a camera-enabled device is selected in the Administration Screen, the configuration settings described above will impact what you see next. We'll start with the **Available** option, which adds a button to the *Welcome* screen as pictured below.

Welcome Screen with Barcode Button




When the barcode button is tapped in **Available** mode, the camera will activate and look for a code to scan.

Camera View




If **Always On** has been selected, you'll be taken directly to the camera view pictured above immediately after moving past the *Administration* screen.

The code being scanned should be placed within the semi-transparent brackets to be read properly.

If the **Passive** setting is used, then the barcode button will still appear on the *Welcome* screen as a reminder that scanning is available but tapping it will not take you to the camera view page pictured above. The person scanning the code will need to know where to position it.

> ### Changing the Barcode Button
> The barcode button can be customized in the application's Configuration, or by modifying the Check-in Display Settings.

When the **Off** setting is used, the process will be the same as if the camera were disabled. The barcode button will not appear, and the camera will not activate.

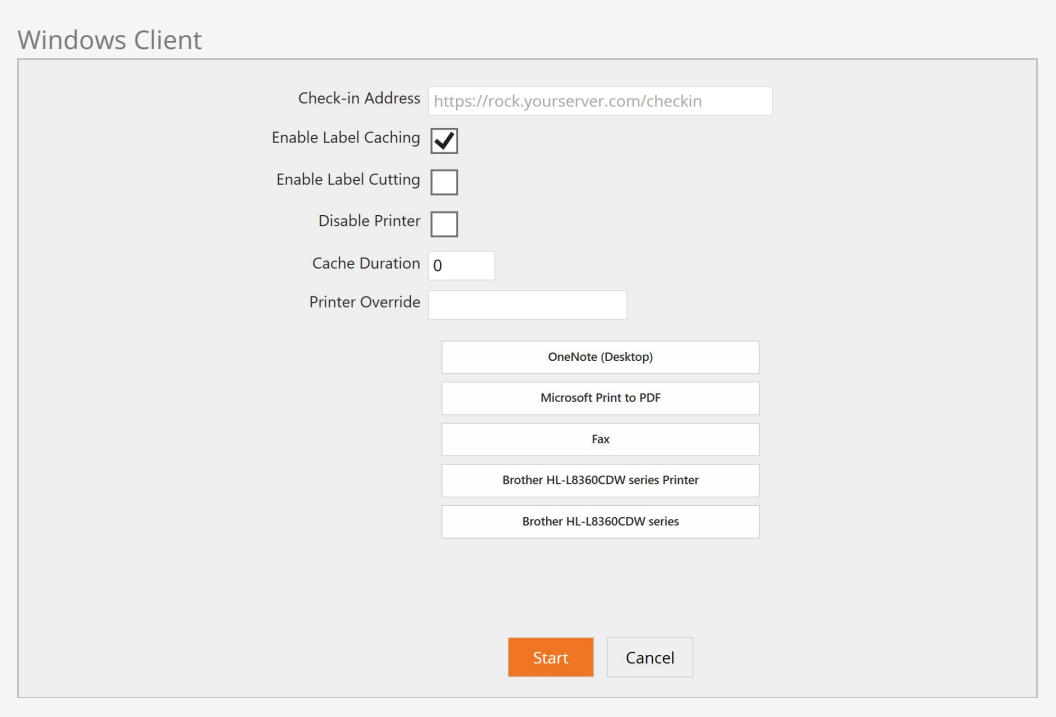
After a valid code has been scanned, the check-in process will continue according to your overall setup.

## Windows Client

If you're planning on running the check-in kiosk on a PC platform, the Windows Client provides a simple and powerful hosting experience. The client application can be downloaded from your Rock install under `Admin Tools > Power Tools > External Applications`.

### Configuration

After running the setup application, you'll have a Rock Check-in icon in your Start Menu and on your desktop. When you launch the application, you'll see the settings screen. Unlike the iPad application you'll see this screen on every launch, but the settings you select will be remembered for you.




Below is a summary of these settings.

| Setting | Description |
|---|---|
| Check-in Address | This is the initial page that will load when the application launches. |
| Enabling Label Caching | This setting will cache the loading of check-in labels, which keeps them from being downloaded on each check-in. |
| Cache Duration | This determines how often the labels will be re-downloaded. The cache can also be expired by stopping the application and restarting. |
| Printer Override | This setting has the effect of always printing from the device to the printer IP address entered here. |
| Printer List | Under the *Printer Override* setting you will see a list of local printers configured in Windows. This allows you to print directly to a USB printer. |

### QR Code Scanning

Don't forget that QR code scanning to identify the person is supported in the Windows application. For details on setting up your device to enable this feature see the Kiosks chapter above. Note that scanning of QR codes generated by [Classic] Mobile Check-in is still limited to iPads only.

## Closing the Windows Client

After pressing the `Start` button, the check-in application will load the initial check-in

screen. When you are ready to exit, simply tap or click in the upper left corner of the screen six times in three seconds to close the application.

## URL Parameters

By specifying additional parameters in the URL of the check-in site, it's possible to pass additional information or override the default behavior of check-in.

For instance, if your check-in URL is `examplechurch.com/nextgen-checkin`, you could use the URL `examplechurch.com/nextgen-checkin/setup?KioskId=2&CheckinConfigId=14&GroupTypeIds=18,19` to load the kiosk with the ID of `2`, use the check-in configuration with an ID of `14`, and group types with IDs of `18` and `19`. This is really useful if you have specific devices that always load the same configuration.

However, what if you have a lot of kiosk devices? It can be impractical to provide a unique URL to every kiosk, even if you want all of them to use the same check-in configuration. Luckily, Rock can go get the kiosk ID for you. If a CheckinConfigId is passed into the Check-in Admin block but a KioskId is not passed in, Rock will attempt to look up the KioskId for you using the client's IP address to find a matching Device in Rock. So, you would use a URL of `examplechurch.com/nextgen-checkin/setup?CheckinConfigId=14&GroupTypeIds=18,19` to enable the kiosk lookup.

If you're explicitly naming the parameters in the URL then the parameter options include:

- KioskId
- CheckinConfigId
- GroupTypeIds

It's also possible to override the theme by appending a `?theme` parameter to the end of your address. For instance, `examplechurch.com/nextgen-checkin?theme=CheckinBlueCrystal` will render the Blue Crystal theme. These parameters are configured using *Routes*, which you can learn more about in the `Designing and Building Websites Using Rock` guide.

# Going Deeper With Areas

We've already spent some time on areas in the earlier configuration but let's dig a little deeper. By now you know that areas are a way of categorizing your check-in groups. They also help to:

- Define which tags will be printed when checking into any of the groups assigned to the area.
- Provide configuration templates by setting the group type for the check-in groups. (More on this in a minute.)
- Structure attendance reporting.

> Keep it Simple
> We've said it before, but it's worth repeating. Your future self will thank you for keeping your areas streamlined and simple. Before adding a new Area, make sure you wouldn't be better off adding a new Group to an existing Area.
>
> For instance, it's possible for a person to check in to more than one area at the same time. But, if a person checks in to "2nd Grade" in the "Elementary" area for the first service and "2nd Grade" in the "Volunteer Kids" area for the second service, only the locations and schedules for one area will be printed on their label. Adding an additional "2nd Grade Kids of Volunteers" group in the "Elementary" area would be better than creating a new area.

## How Areas Assist With Configuration

The check-in system is a rich pairing of Rock's workflow engine and groups system. Under the hood, *Areas* are really just *Group Types* while check-in groups are, well, *Groups*. Before continuing on with this section we highly recommend you stop and read the `Rock Your Groups` guide to get a solid background on Rock's group capabilities, paying special attention to the *Group Types* section. Don't worry, we'll wait...

Now that you have a good understanding of groups and group types let's continue. Since check-in areas determine the group types for their groups, you can configure attributes for the groups by modifying the area group type. That's a mouthful, but it will make more sense when you look at the group types under `Admin Tools > General Settings > Group Types`. Here you'll see each of the areas you've defined using the check-in configuration screens. If you click on them, you'll see some familiar attributes like *Age*

*Range* and *Grade Range*. The check-in configuration screens are really a simplified group type and group editor especially designed for check-in. You could do all of the configuration using the normal group type editor and group viewer, but it would be much more difficult.

## Using Group Type Inheritance

Imagine what a pain it would be to have to add attributes like *Age Range* to every new check-in group you create. Make one typo and your check-in might break. That's where group type inheritance comes to your aid.

Group type inheritance simply means that attributes from one group type are used (inherited) by another group type. For instance, the *Check-in by Ability Level* group type that ships with Rock has an *Inherited Group Type* of *Check-in by Age*. This means that all of the attributes configured for *Check-in by Age* are also set up for *Check-in by Ability Level*. This saves you from having to manually recreate attributes that you use often in your check-in setup.

You might be asking, "I get the inheritance but what if I need a group to inherit attributes from more than one group type?" Brilliant! We have that same problem, too. You might notice that groups like *Jr High* have a need for both the *Age Range* attribute AND the *Grade Range* attribute. But a group type can inherit from only one group type.

From your reading in the `Rock Your Groups` guide, you may remember the concept of group type hierarchies. In this case, *Check-in by Grade* inherits from *Check-in by Age*. So, check-in areas (group types) that inherit from *Check-in by Grade* get the attributes from both, allowing your check-in groups to filter by *Age Range* and *Grade Range*. This complicated behind-the-scenes concept really serves to keep things simple for you.

Let's circle back to the pre-configured group types called *Check-in by Age*, *Check-in by Grade* and *Check-in by Ability Level*. You can probably guess by their names what each one does. If you're sharp (and we know that you are) you may have also noticed that these group types have a purpose defined as *Check-in Filter*. A group type's *Purpose* is really just a way of telling you what it's used for. In this case, giving a group type the purpose of *Check-in Filter* helps Rock know when to show it on certain screens. Nothing magic, we promise.

# Check-In Test Area

You may have noticed an area called *Check-in Test Area*. This area is used to help you test your kiosk configuration and label printing. Since most areas and groups are only configured to allow check-in during certain schedules, they aren't that helpful for testing. The *Check-in Test Area* is configured to be available all the time.

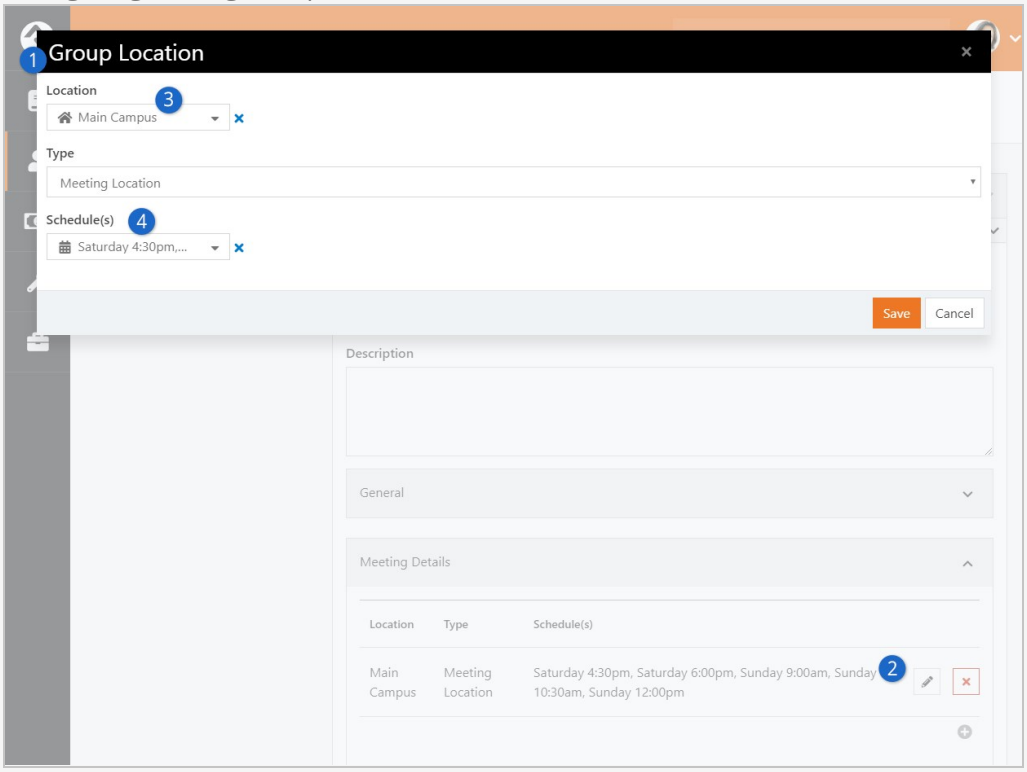
# Beyond Children's Check-In

While much of this document has focused on using check-in for childcare activities, Rock is capable of much more. Below we'll discuss a few ideas on how to extend check-in.

## Serving Groups

Serving groups are one of the pre-configured group types in Rock. There are many benefits to having people check in when they serve. To help you gather that data, we've configured the serving groups to allow check-in. All you need to do is provide two settings for each group to help Rock know where and when to allow check-in. Let's take a look at how to do this.

Configuring Serving Groups For Checkin




1. **Navigate**
   Edit the group from `People > Group Viewer`.
2. **Open The Details**
   Expand the *Meeting Details* panel and click the + button if no location has been set, or the ✎ button if one has.
3. **Location**
   Select a *Location* for the meeting spot. This will be used to help determine which kiosk device should handle the check-in. It's best to choose a broad location (like a campus instead of a specific room), because this allows your group to be visible to the check-in kiosk without a lot of extra configuration. See how we're saving you all this time?
4. **Schedule**
   Select a *Schedule* to determine when the check-in should be active.

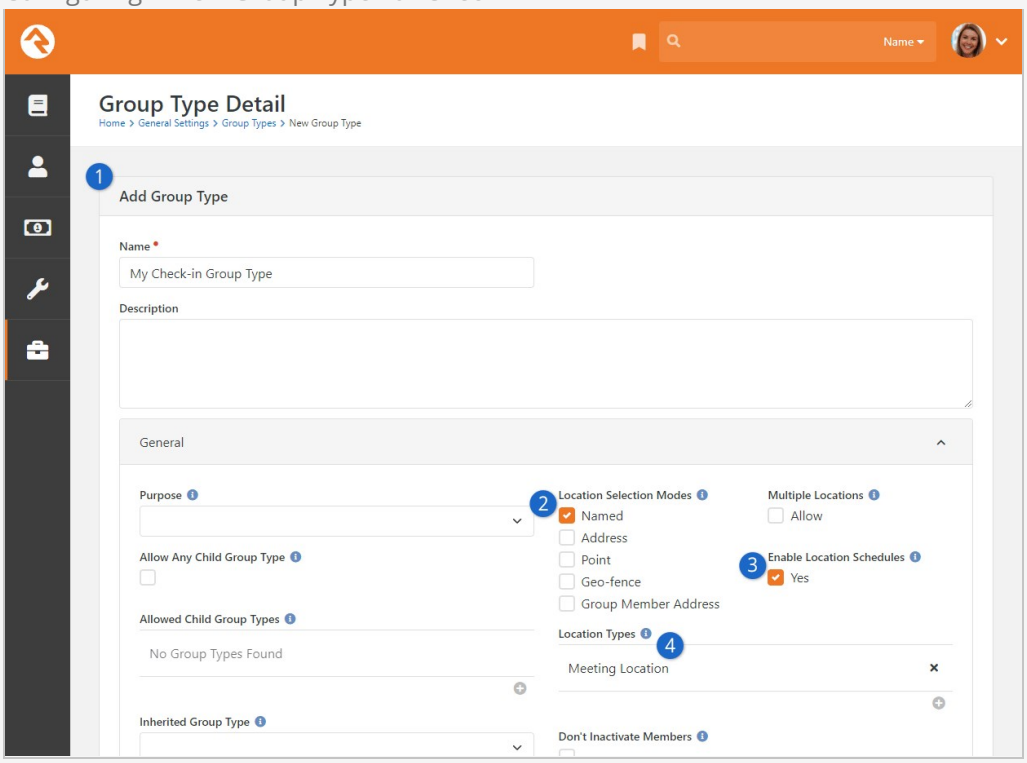
Voila! Your serving group is now ready for checking in.

> Double Check:
> Make sure that the check-in kiosk you are using is configured for the location you chose for the group.

## Configuring New Group Types for Check-in

Now that you've seen ~~the power of the dark-side~~ how serving groups can check in, we bet you're wondering how to configure other group types for check-in. Just follow these steps.

Configuring A New Group Type For Check-In




1. **Name**
   Add or edit your group type under `Admin Tools > General Settings > Group Types`. Be sure to give it a good name and a clear description so there's no confusion about what it's for.
2. **Location Selection**
   Configure the *Location Selection Modes* to use *Named* locations.
3. **Location Schedules**
   Make sure *Enable Location Schedules* is enabled.
4. **Location Type**
   Add the *Location Type* of *Meeting Location*.

Once enabled, you'll still need to add the meeting details just like we illustrated in the *Serving Groups* section above.

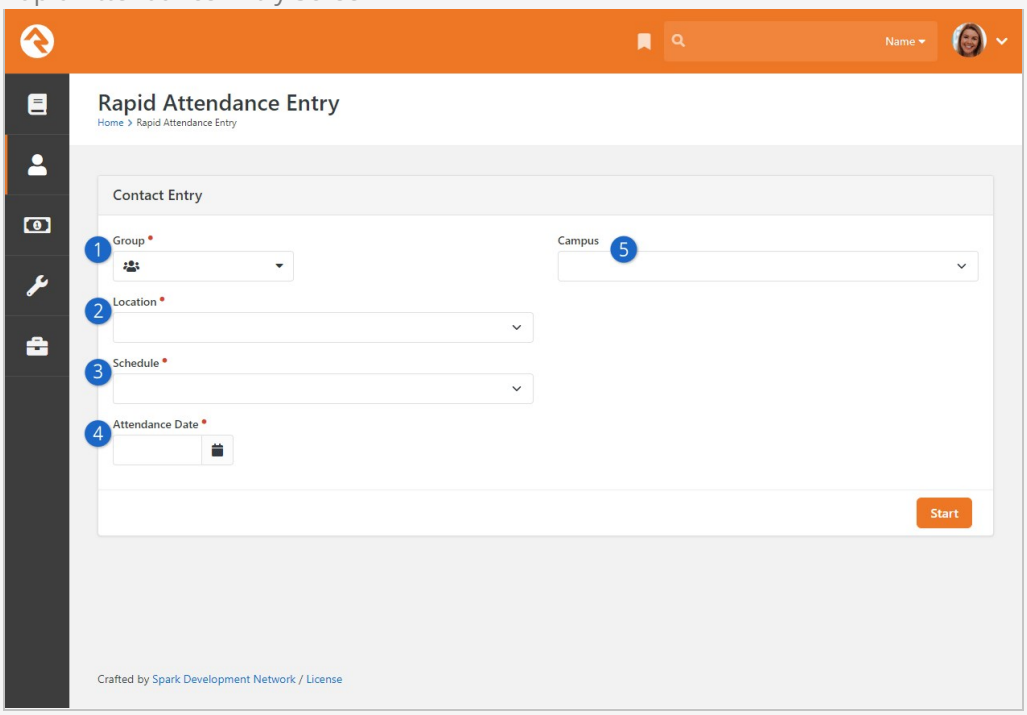
Well done. You are now a check-in whiz. You can properly configure check-in for any group type.

# Rapid Attendance Entry

The *Rapid Attendance Entry* block allows you to record attendance for lots of people very quickly. This could come in handy for certain situations, such as checking a lot of people in for a worship service and wanting to do so as fast as possible. *Rapid Attendance Entry* can also be very useful outside of attendance. It's great for entering communication cards, prayer cards or other information you might collect in large volumes. The *Rapid Attendance Entry* block makes these tasks quick and simple. Let's look at how it works.

To start, navigate to `People > Rapid Attendance Entry`. You'll begin the process by selecting the group for which you want to record attendance. The group's settings and attributes determine which options will be available on the screen.

Rapid Attendance Entry Screen

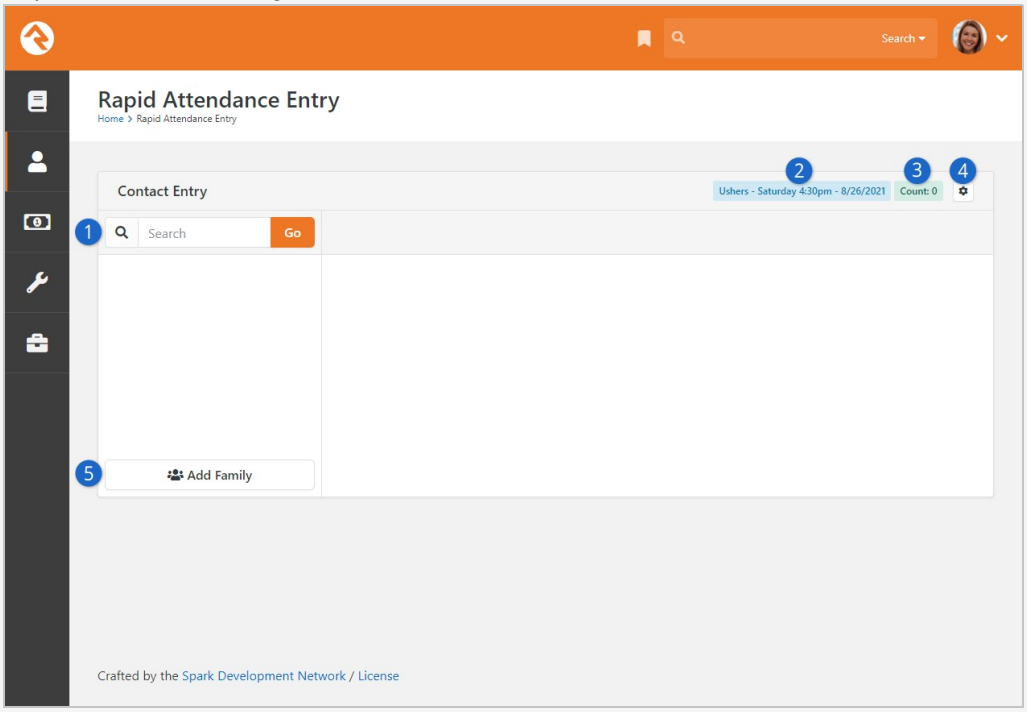



1. **Group**
   Select the group for which you want to enter attendance. The group's configuration will determine what other fields appear on this page. In some cases, *Group* and *Attendance Date* will be the only fields you see.
2. **Location**
   If the group has multiple locations, select the one you need for attendance.
3. **Schedule**
   You'll be prompted to select a schedule only if there are multiple schedules for the chosen *Location*. Otherwise, this field will not appear.
4. **Attendance Date**
   Provide the date for which you want to record attendance. You can either choose a date from the calendar or enter a date manually.
5. **Campus**
   You can optionally select a campus, which will filter the Locations for that campus. This field can be shown or hidden by updating the block settings.

After filling out the required fields as described above, click the `Start` button to proceed to the page pictured below.

Your page may look slightly different depending on how your organization has configured the block settings.

Rapid Attendance Entry Search

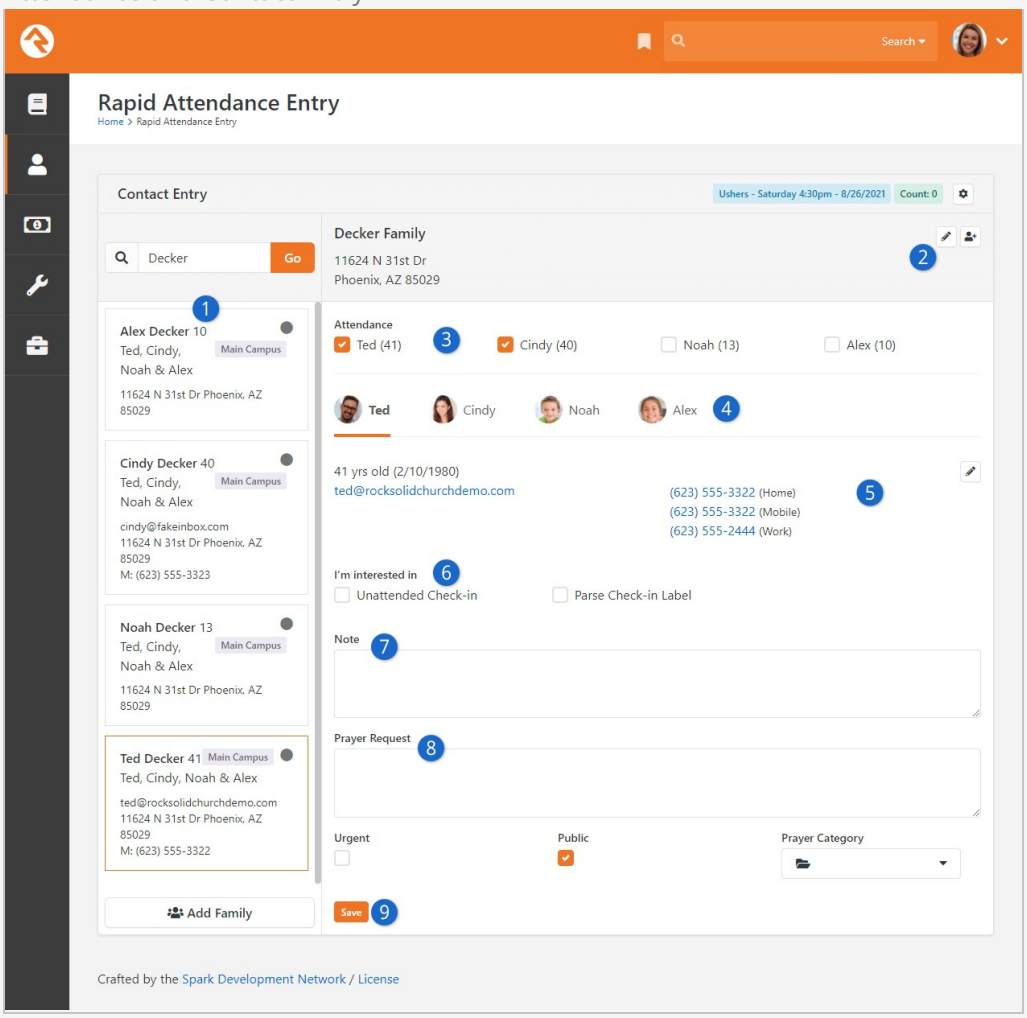



1. **Search**
   Provide a person or family name and click the `Go` button to proceed with recording attendance. As always, we recommend doing a thorough search before adding a new person or family.
2. **Attendance Details**
   The group, schedule, and attendance date selections from the prior page are displayed here for reference.
3. **Current Attendance Count**
   This count will increase as each person's attendance is recorded. Block settings can be used to turn this into a link to an attendance page, allowing you to easily access the list of recorded attendees.
4. **Settings**
   Click the ⚙ button to go back to the first screen. This is how you'll change the group, location, schedule or attendance date.
5. **Add Family**
   If the family you're looking for isn't in Rock yet, you can add a new family directly from here.

After entering a name and clicking `Go`, you're ready to start recording attendance...and more!

Again, keep in mind that there are many block settings to tailor this page to your organization's needs. The example pictured below highlights some useful features, but they aren't required and may not be visible when you access the page in your system.

Attendance and Contact Entry




1 **Person List**
The panel along the left will show you individuals who match the search criteria you provided. You can switch between people and families by clicking here.

2 **Family Information**
Information for the selected person's family is displayed near the top of the block. You can edit the family's address without leaving the page by clicking the icon. Add individuals to the family by clicking the icon.

3 **Attendance Selection**
Select the available boxes for anyone who should have attendance recorded. In this example, we can't select Noah or Alex because they are too young. Administrators can change the age restriction in the block settings.

4 **Select Person**
Click a person to view information like their age, email or phone number. Depending on your block settings, there are other actions you can perform elsewhere on the page, which we'll describe in the following points.

5 **Person Details**
The details for the selected person are displayed in this area. This

information can be edited directly from this page by clicking the icon.

6. **Workflows (I'm interested in...)**
   If enabled in the block settings, workflows can be launched from this page when the page is saved. The title "I'm interested in" and the available workflows can be changed in the block settings.

7. **Note**
   This block's settings can be configured to enable Person note entries directly from the page. The block settings also let you specify which *Note Types* can be used. If multiple *Note Types* are allowed, then the person entering attendance can choose which one to use.

8. **Prayer Request**
   Prayer requests can be entered if allowed by the block settings. There are several block settings related to prayer requests. In the example pictured above, we used the block settings to enable the *Urgent*, *Public* and *Prayer Category* fields.

9. **Save**
   We're bringing attention to the Save button as a reminder that this single button applies to all the changes you've made in the areas described above. With a single click you can add the note, create the prayer request, launch a workflow and, of course, save attendance.

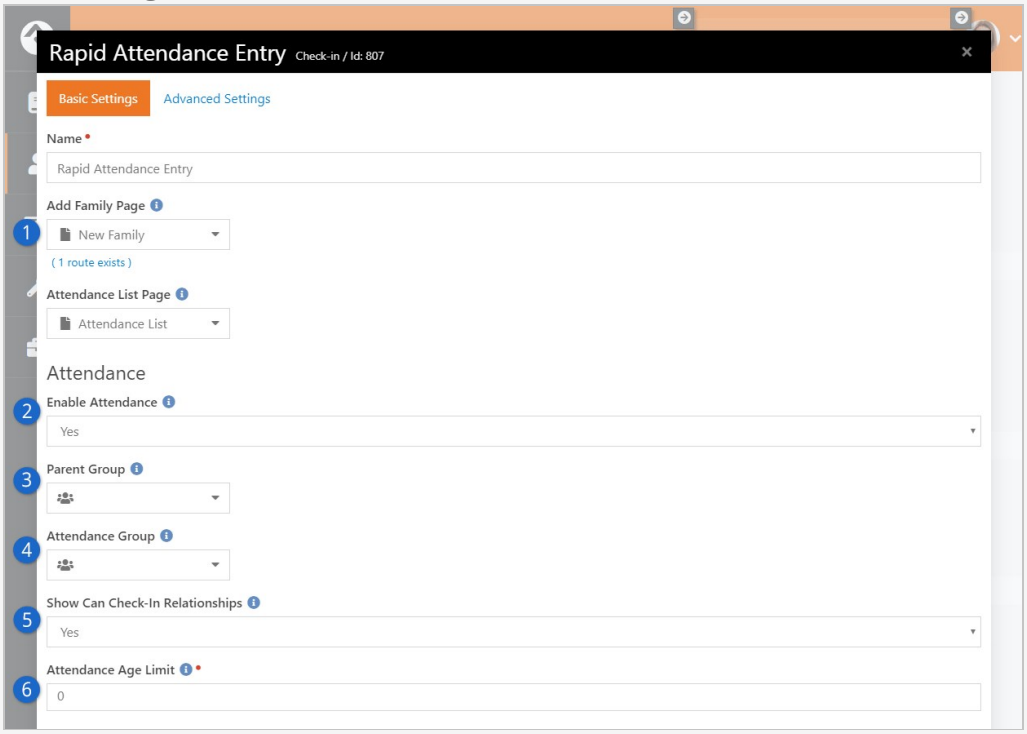
Workflows launched from this block will be passed the person as the workflow's entity. If they exist, the block will also fill in any of the workflow attributes listed below:

- **Group -** The group for which the attendance is being entered. The attribute should be of type group.
- **Location -** The selected location for which attendance is being entered.
- **Schedule -** The schedule selected for entering the attendance.

## Rapid Attendance Entry Block Settings

It's easy to see that there's a lot more to *Rapid Attendance Entry* than entering attendance. But to truly understand all your options for this feature, we'll need to dive into the block settings. There are a lot of settings to cover, so we'll break it down into a few parts.

Block Settings - General and Attendance




1. **General Settings**
   Here you can update the name of the block. You can also change the pages that individuals will be taken to when attempting to add a new family or view attendance list data.

2. **Enable Attendance**
   Because there's so much that can be done on this page, you might choose to disable the attendance feature entirely. This could be useful if you're adding this block to a custom page that should only be used for entering contact cards or prayer requests.

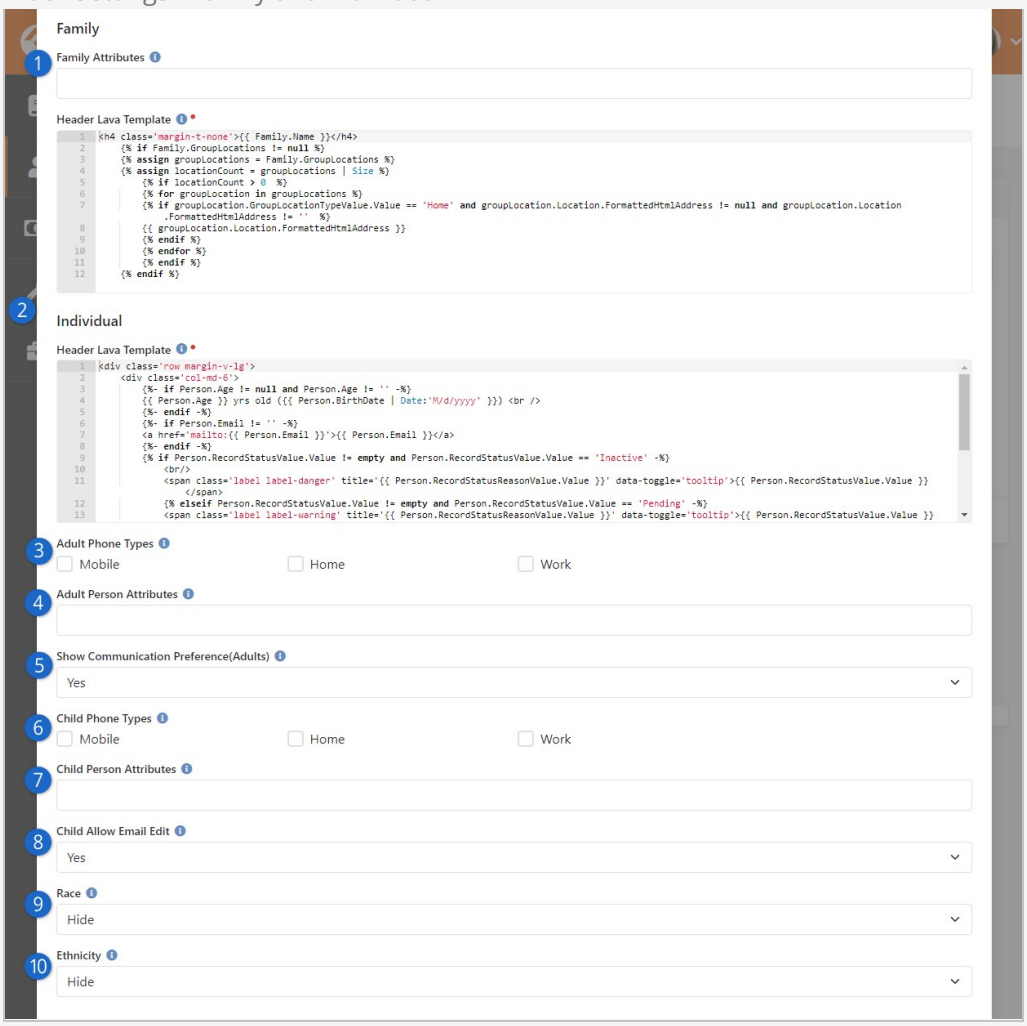
3. **Parent Group**
   You can limit which groups are available for attendance entry by designating a parent group. Only groups that are listed under the selected parent group will be selectable.

4. **Attendance Group**
   By selecting a group here, you can limit the block to only allow attendance entry for the selected group.

5. **Show Can Check-In Relationships**
   If enabled, individuals who have a "Can check in" *Known Relationship* to the selected person will be available for attendance entry.

6. **Attendance Age Limit**
   Individuals younger than the age provided here cannot be marked as having attended. This can be left as zero to allow attendance for individuals of any age.

Block Settings - Family and Individual




1 **Family Attributes**
If you have any family attributes set up, you can choose what should appear when editing family information. Those attribute values can be changed while editing the family.

2 **Family and Individual Header Lava Templates**
You can edit this Lava to change what information about a person or family is displayed, or to change how the information is displayed. You probably won't need to update this, but it's an option if you're familiar with `Lava`.

3 **Adult Phone Types**
The phone types you select here will be made available for view or edit when editing an adult individual's information.

4 **Adult Person Attributes**
The selected attributes will be available when editing an adult's person information.

5 **Show Communication Preference (Adults)**
If this is set to "Yes" then the communication preference for adult individuals can be seen and changed when editing the individual's information.

6 **Child Phone Types**
The phone types you select here will be made available for view or edit when editing a child's person information. Always use caution when adding phone numbers for children, and be sure you're familiar with Children's Online Privacy Protection Act (COPPA) compliance standards.

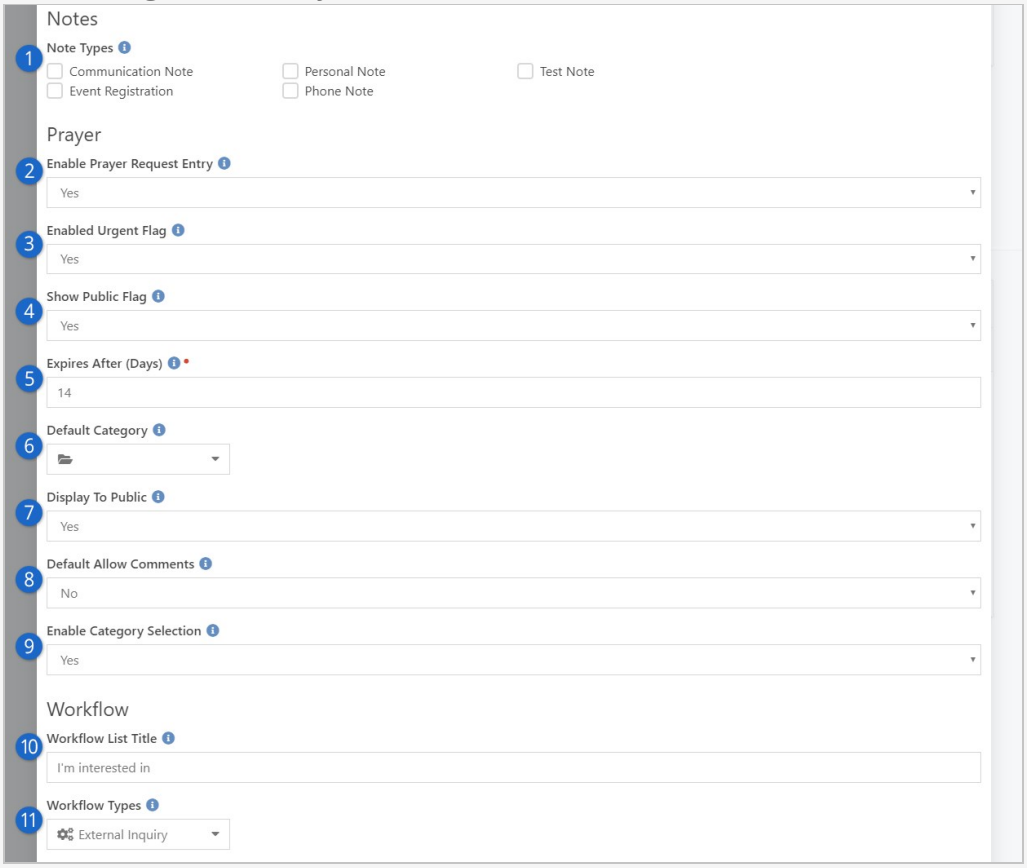
7 **Child Person Attributes**
The selected attributes will be available when editing a child's person information.

8 **Child Allow Email Edit**
If enabled, a child's email address will be available for display and edit. Always use caution when adding email addresses for children, and be sure you're familiar with Children's Online Privacy Protection Act (COPPA) compliance standards.

9 **Race**
You can choose to collect a person's race, which describes their physical traits and characteristics.

10 **Ethnicity**
You can also choose to collect a person's ethnicity, which is a cultural identifier.

Block Settings - Notes, Prayers and Workflows



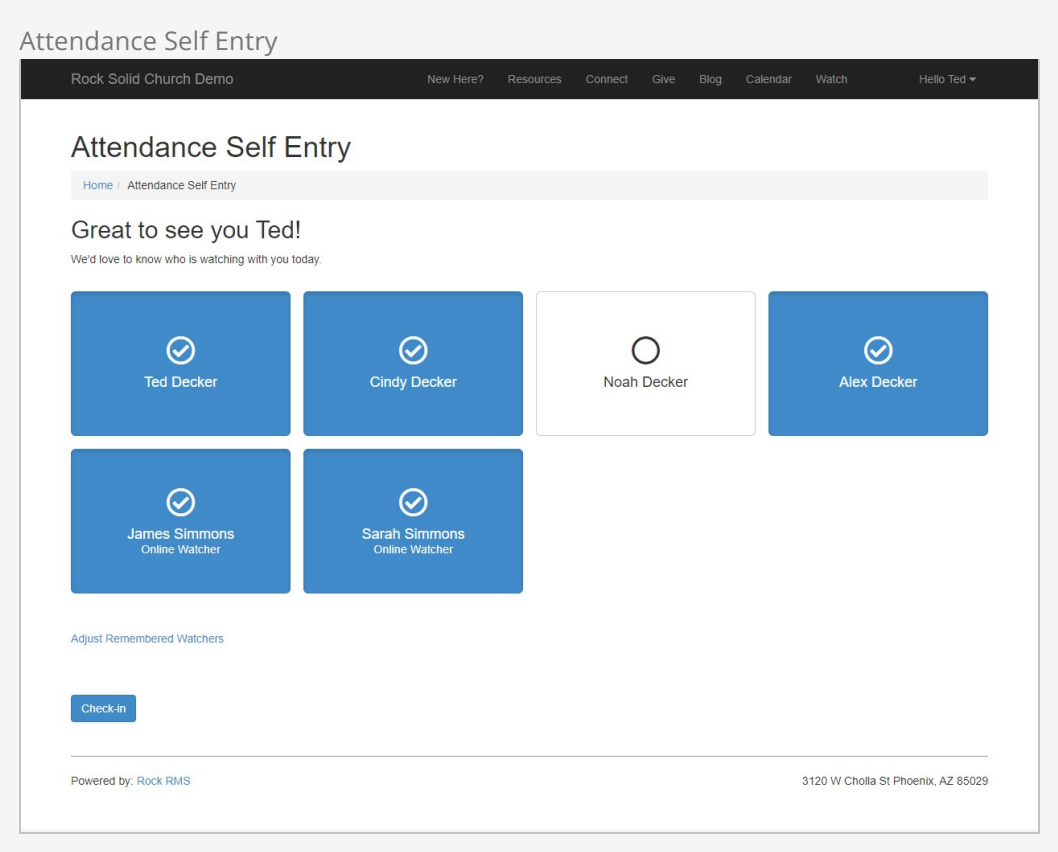

1 **Note Types**

Select which types of notes can be used. If multiple types are allowed, then the person entering attendance will choose which one to use. If nothing is selected, then the page cannot be used to enter notes.

2. **Enable Prayer Request Entry**
   You can choose to enable or disable prayer request entries on the page by changing this setting.
3. **Enabled Urgent Flag**
   Set whether the “Urgent” flag can be selected.
4. **Show Public Flag**
   Set whether the prayer request can be marked as “Public” from the page.
5. **Expires After (Days)**
   Set the number of days before the prayer request is expired.
6. **Default Category**
   You can optionally provide a default prayer category into which the request will be grouped. If category selection is not enabled (see below), then this will be the category into which all requests from this page will be grouped.
7. **Display to Public**
   If enabled, all requests will be set to “Public” by default. This can be changed for individual requests if the public flag is configured to be shown.
8. **Default Allow Comments**
   Set whether or not prayer requests entered here should allow comments.
9. **Enable Category Selection**
   This controls whether the person entering the prayer request can choose a category or change the default category if one has been configured.
10. **Workflow List Title**
    This allows you to create a custom title that appears above the available workflow types. You can change this to match the wording on a contact card.
11. **Workflow Types**
    Select one or more workflows that can be launched from the page. See details above.

# Attendance Self Entry

With the advancement of online services, getting accurate engagement data can be a challenge. To address this need, Rock lets attendees report their own attendance from your external site. All a person needs to do is check a few boxes to indicate who's watching the service with them.




Pictured above, Ted is watching the service at home with Cindy and Alex. Noah is at grandma's house this weekend, so isn't selected. Below the family you can see Jim and Sarah Simmons are over at the Decker house watching the service too.

With everyone in the room accounted for, all Ted needs to do now is click the `Check-in` button near the bottom of the page to have their attendance recorded.

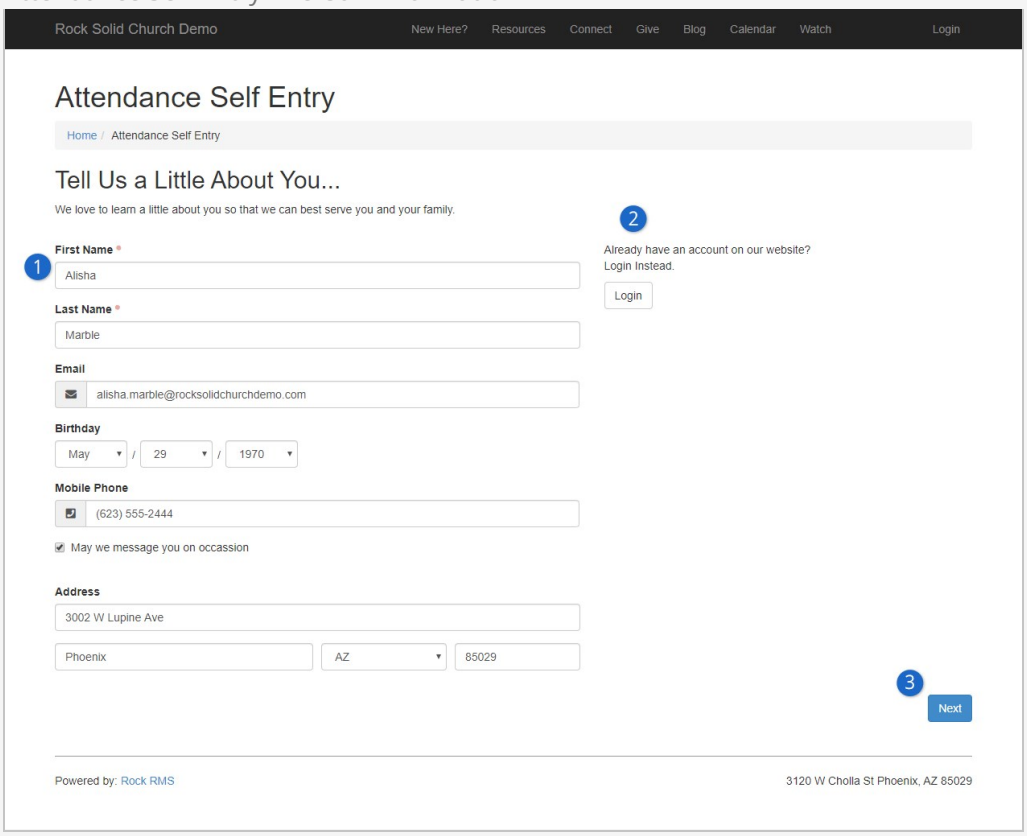
> **Using with Moments**
>
> The Attendance Self Entry feature pairs very nicely with Church Online Platform's "Moments" feature. Check out the details here to learn more.

## Attendance Self Entry In Detail

In the above example, Ted was logged in to the external website. That's how Rock was able to find him and his family. There's a little more to the process if Rock doesn't know who the person is.

In this section, we'll walk through the full attendance self-entry process for Alisha. Alisha is new to the organization and is watching an online service with her family for the first time. Rock can't track attendance for someone who's not in the system, so we'll ask her for some basic information to get started.

Attendance Self Entry - Person Information




1. **Person Information**
   At a minimum, the person is required to provide their first and last name. The remaining fields are optional by default, but you can make them required in the block settings.

2. **Login**
   This area provides an opportunity for the person to log in. Logging in lets the person skip to the last step of the process and helps ensure attendance is being added for the right people.

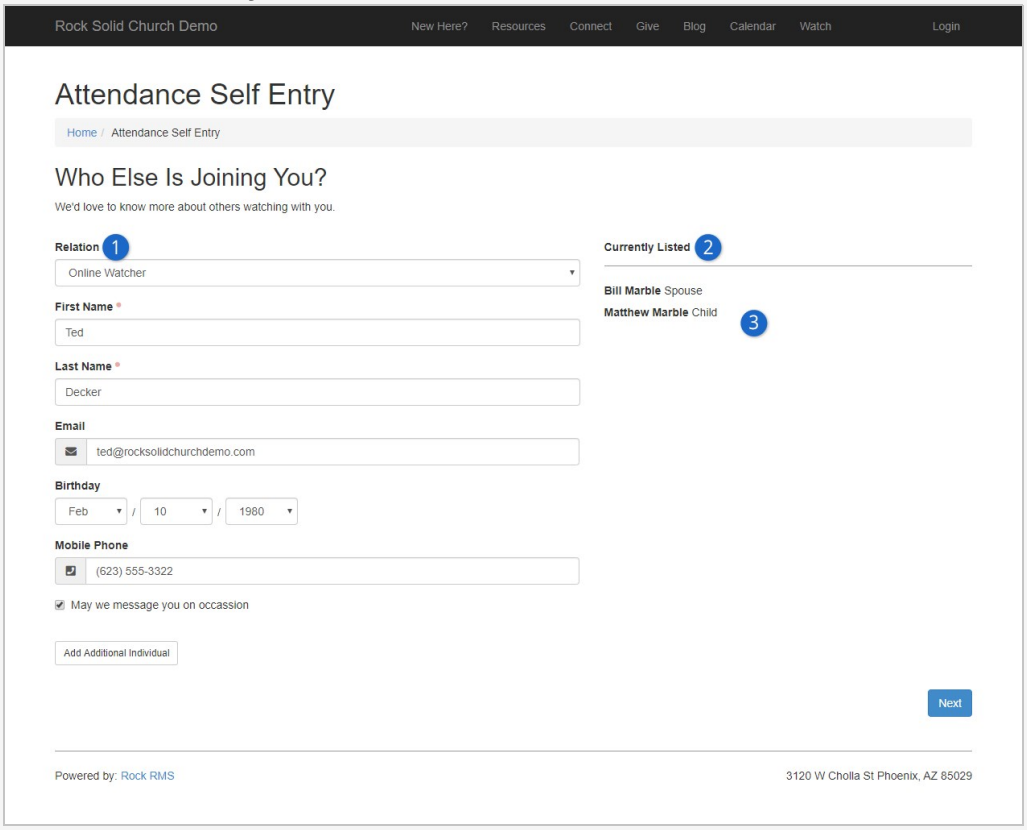
3. **Next**
   After clicking `Next`, Alisha's information is compared to person records in the system. If a match is found, then Rock will automatically add the person's family on the next page (see screenshot below). If a match isn't found, then a new record will be created for Alisha using the information she provided.

On the next page, Alisha is asked to provide similar information for anyone who's joining her. Because Alisha is new to the church and doesn't have a record in Rock, she'll need to add each of her family members manually. Ted Decker is joining the Marble family for this service, so Alisha will need to add him too.

Pictured below, Alisha is adding Ted Decker as an 'Online Watcher' to indicate that Ted is watching with her and her family. For those who are curious, 'Online Watcher' is a *Known Relationship* in Rock and is used to connect these individuals to each other.

As many watchers as needed can be added by clicking the `Add Additional Individual` button. Each new person is added to the list on the right, where we can see Alisha has already added Bill and Matthew.

Attendance Self Entry - Other Watchers




1. **Adding Other Watchers**
   The person filling out the form can select a *Spouse*, *Child* or *Online Watcher* to add to the list of attendees. The next section below explains how to change these options. An individual can only have one *Spouse*, but as many other types of watchers as needed.

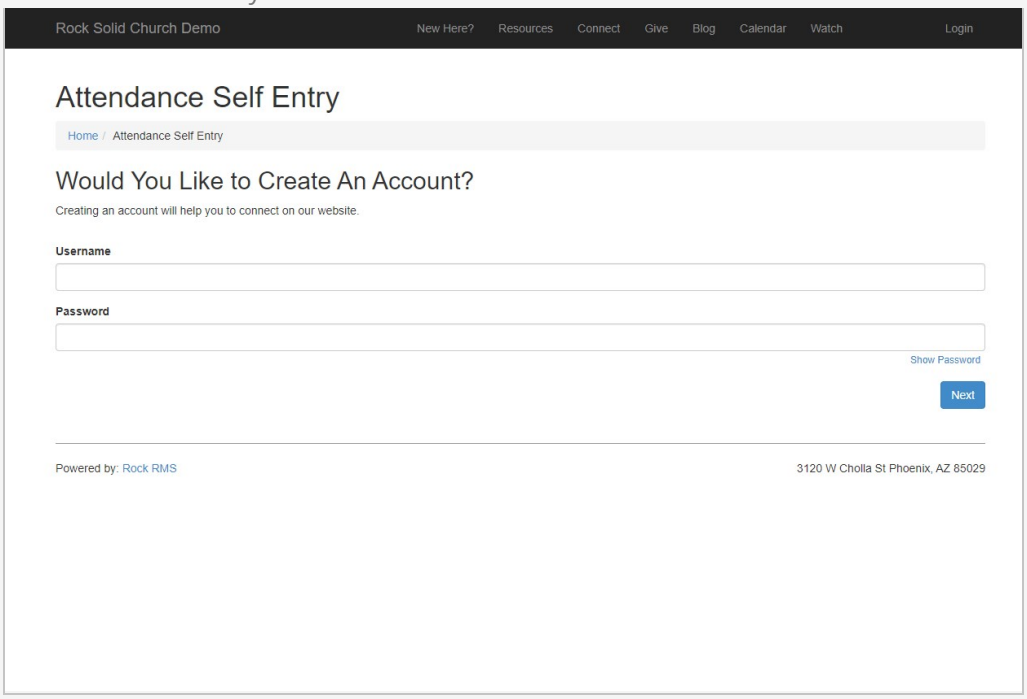
2. **Currently Listed**
   The people listed here will be available for check-in on the next page. It's important to note that this list isn't meant to actively track who is watching an individual service on a given day. For instance, if someone is hosting a watch group then all of the planned participants should be added here, regardless of that day's attendance.

3. **Remove Remembered Watchers**
   Watchers that the person has added can be removed by hovering over the person's name and clicking the "X" icon that appears. Family members (Spouse or Child) can't be removed from this list.

After everyone has been added to the list, the person clicks `Next` to proceed. Because she's new, Alisha is prompted to create an account so she can log in next time and save

herself a few steps.

Attendance Self Entry - Create Account

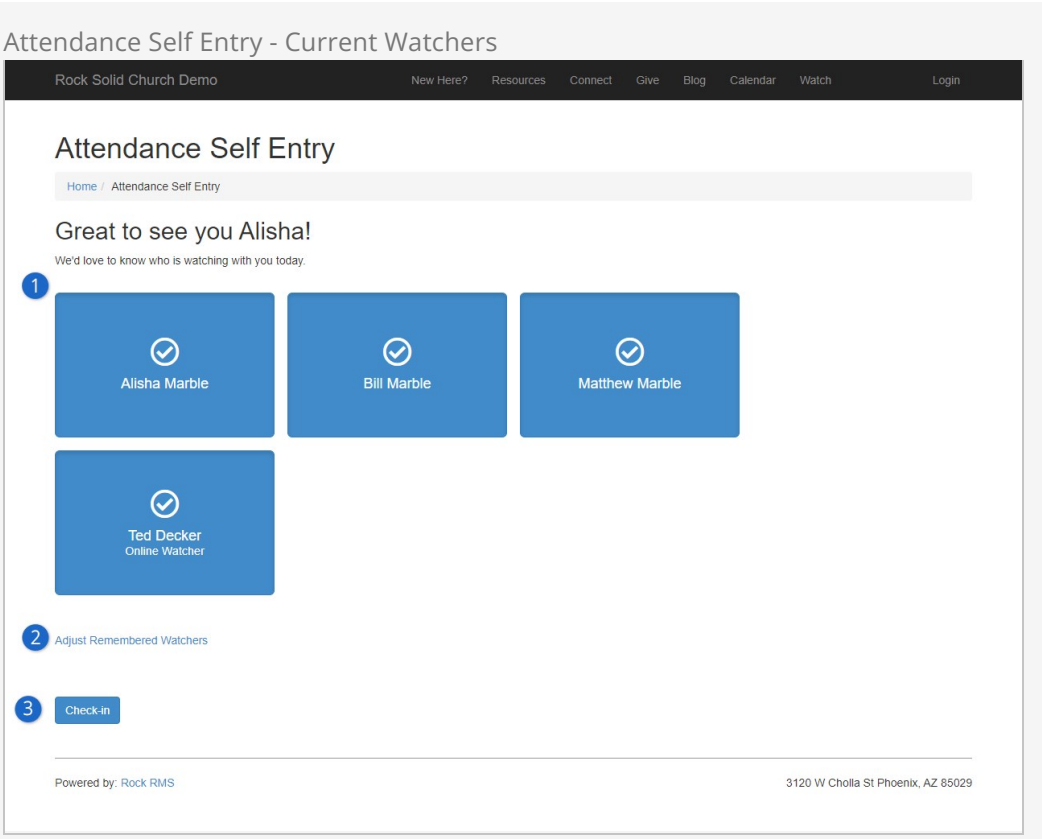



Account creation is optional but should be encouraged. Whether or not the person creates an account, they can proceed by clicking the `Next` button.

> ### Do I Have To Do This Every Week?
>
> A person only needs to provide their information once, even if they never log in. That's because Rock will place a cookie on their device to identify them for future services. So, *identified* individuals will have the same experience as *authenticated* individuals. But remember, being identified isn't the same as being authenticated. Individuals must log in to access other areas of the site that require authentication.

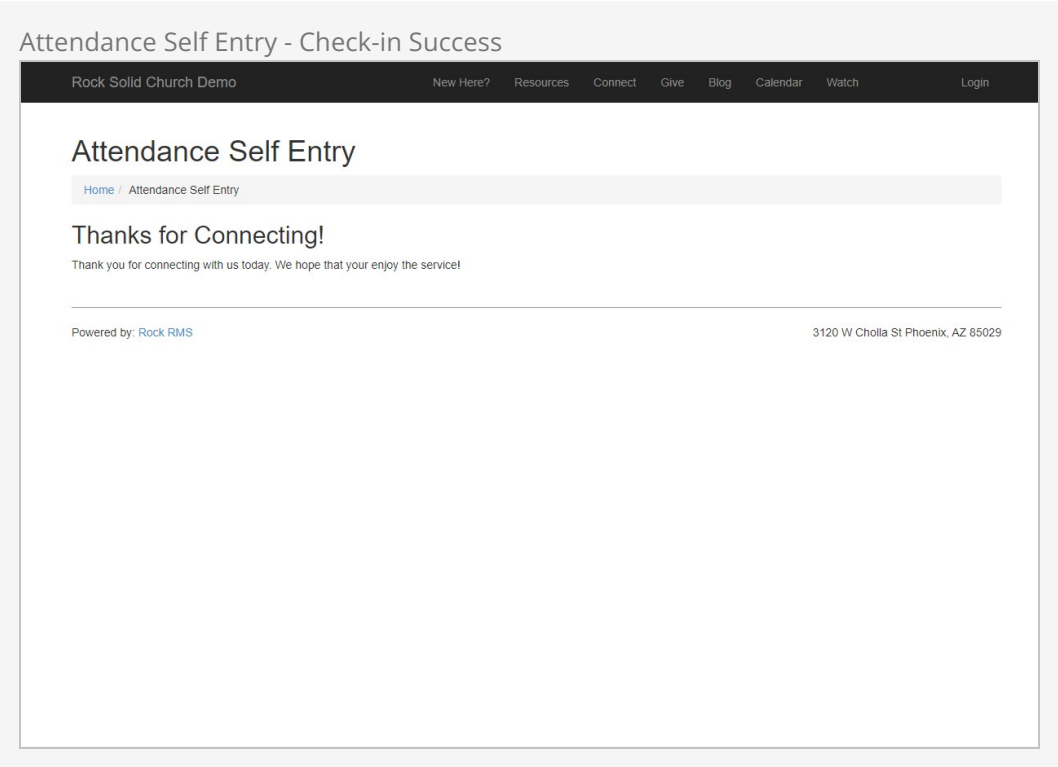
The last step, pictured below, is where Alisha will indicate who is watching the current service. Rock assumes that everyone who was added in the prior step is still watching, so everyone from her list is selected. Individuals can be de-selected here if they're no longer watching.

This is the last step in the process for Alisha, but you might recall from the start of the chapter that it was the first step for Ted. Any identified or authenticated person will always start on this page.




1. **Attendee Selection**
   Everyone from Alisha's list is watching the current service, so everyone is selected. Any person can be deselected by clicking inside the blue box, indicating that they aren't watching this service.
2. **Adjust Remembered Watchers**
   Rock remembers the people who have watched a service with you and will keep your list from one service to the next. Alisha can remove Ted from the list, or add new people, by clicking this link. This takes the person to the same page described above.
3. **Check-in**
   After the current service's participants have been selected, the `Check-in` button is used to add their attendance for the service.

After Alisha clicks `Check-in`, the below page confirms that the attendance has been successfully submitted.




It's important to note that this process has created person and family records in Rock for Alisha and her family. Ted already had a record, otherwise one would have been created for him too. This is required because a person needs to be in Rock for their attendance to be added.

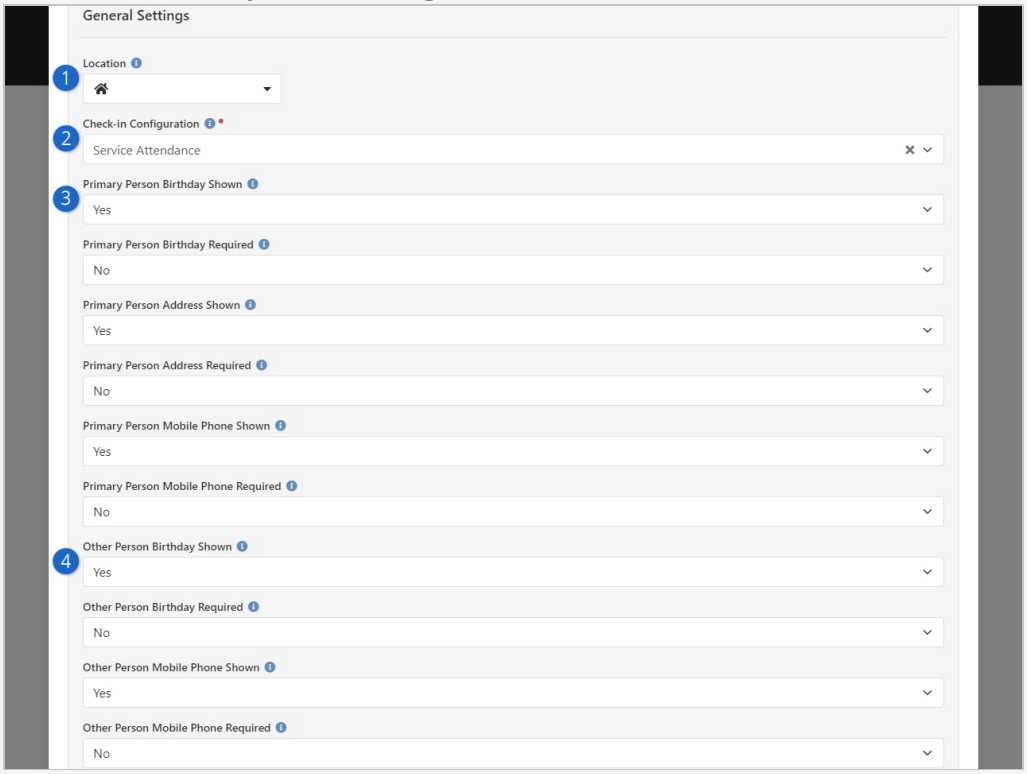
> ### What About In-Person Attendance?
> *Attendance Self Entry* works the same way for any type of service. The same pages and processes can be used to track attendance for services that are in-person, online or a combination of both.

## The Attendance Self Entry Block

Now that you're familiar with the process, let's take a closer look at the *Attendance Self Entry* block itself. This block handles the entire process from start to finish, so there are a lot of configuration options to cover. We'll break down the block's settings into pieces below.

First, there's some terminology you should know. The block's settings refer to a *Primary Person*, who is the person that's filling out the form. In the prior section, Alisha Marble was the *Primary Person*. There are also settings for *Other Person*, which apply to anyone other than the *Primary Person*.

Attendance Self Entry - Block Settings 1




1. **Location**
   If you select a location here, the block will match the attendance record with that location. This only works if the check-in area's group is associated to that location.

2. **Check-in Configuration**
   You may have noticed in the prior section that Alisha never provided information about the service she was attending. The block uses the check-in configuration selected here to know where to add attendance automatically. See below for more details.

3. **Primary Person Options**
   This set of options lets you customize what information you can collect from the primary person. The primary person is always required to provide their first and last name at a minimum, so there aren't settings for those fields.

4. **Other Person Options**
   These options apply to the information gathered for people other than the primary person. Like the primary person, a first and last name must be provided. The *Email* and *Mobile Phone* fields are not shown when a *Child* is being added.

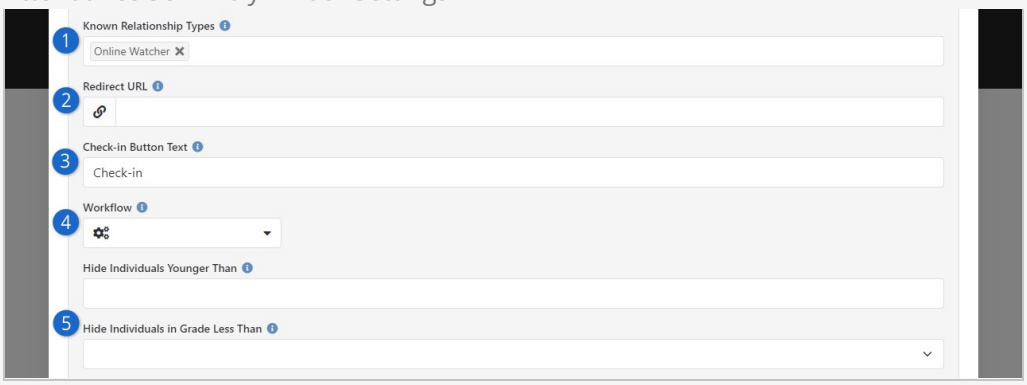
As noted above, Rock uses the *Check-in Configuration* setting to know where to add attendance. There's some complex logic behind how this works, which we won't get into here. In short, the block looks for the appropriate service by comparing the selected check-in configuration to the time when the person is checking in. For instance, Rock will

automatically determine that the person checking in at 9:55am is watching the configured 10:00am service.

> ### Additional Logic for Adding Attendance
>
> If the block can't find an appropriate schedule with respect to the person's check-in time, then the attendance will be added to the first group that's found without a location or schedule. If no such group exists, then the attendance can't be recorded.

Pictured below are the next set of configuration options for the *Attendance Self Entry* block.

Attendance Self Entry - Block Settings 2




1. **Known Relationship Types**
   The *Known Relationship* types you add here will appear as options in the *Relation* field described in the prior section. Also, the people with whom the primary person has these relationships will automatically be added to their list of watchers. For instance, if we added "Sibling" then Alisha's brothers and sisters would automatically be added to Alisha's list (assuming they have records in Rock and are set up as siblings).

2. **Redirect URL**
   At the end of the process, when the primary person clicks the `Check-in` button, you can optionally direct them to a different page by providing a URL here. If this is blank, the default confirmation page shown in the prior section is displayed.

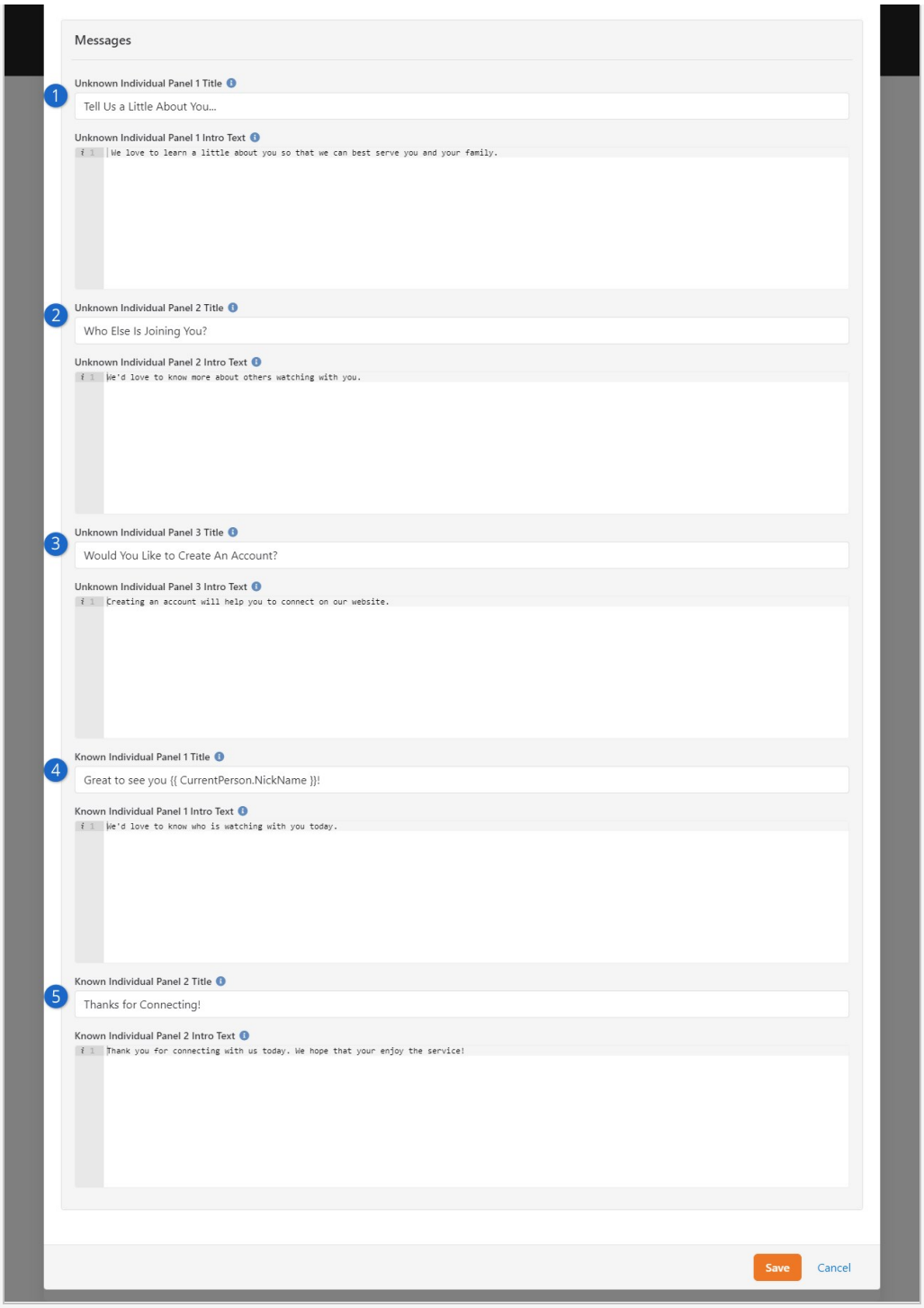
3. **Check-in Button Text**
   The `Check-in` button can be assigned a different name by changing it here.

4. **Workflow**
   You can optionally launch a workflow when the person finishes the check-in process. The primary person will be passed to the workflow, along with information about the group and schedule. For full details, see the help text (the ℹ icon) for this setting in Rock.

5. **Hide Individuals**
   You can place age or grade restrictions on the people who appear in the list of attendees. For instance, you can prevent anyone under the age of 18 from being selected for attendance in the service.

The last set of configuration options lets you change the text that's shown near the top of each attendance entry panel. As pictured below, you can edit the *Title* and *Text* for each panel described in the prior sections.

Attendance Self Entry - Block Settings 3




1 **Unknown Individual Panel 1**
This is the first panel someone sees if they're not identified or authenticated. It's helpful to indicate why the information is being collected, so people are less concerned about sharing their personal information.

2 **Unknown Individual Panel 2**
This panel is where the primary person can add or remove other watchers. Both new and returning individuals can access this panel, so avoid phrases like "Welcome Back!" that don't apply to everyone.

3 **Unknown Individual Panel 3**

The title and text of the account creation panel can be changed here. This panel won't appear for people who are logged in, so only applies to new attendees.

4. **Known Individual Panel 1**
   This is the panel where the current service's attendees are selected. In many cases, this will be the only panel a returning person sees.

5. **Known Individual Panel 2**
   After clicking the `Check-in` button, this is the confirmation panel that displays. This configuration doesn't apply if you've also configured a *Redirect URL* as described above.

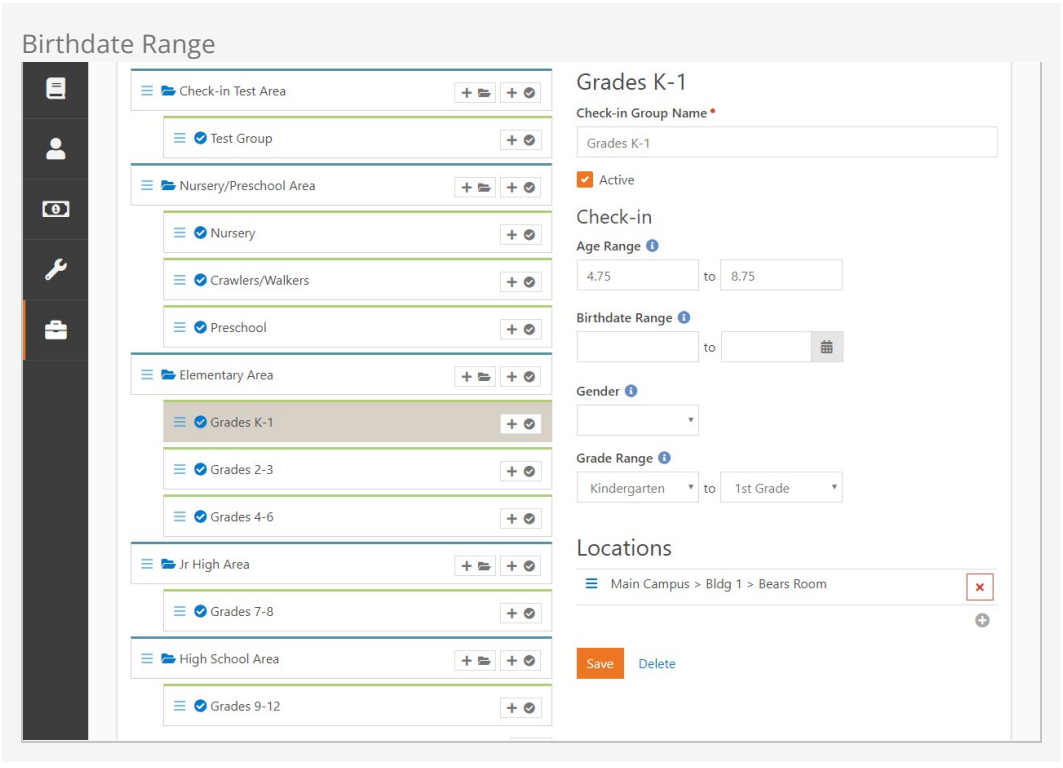
You might have noticed the Lava in the title for *Known Individual Panel 1*. That's right, you can personalize the experience by adding Lava to any panel's *Title* or *Text* content. Remember, not all the panels will know who the person is.

# Additional Check-In Options

While Rock ships with the check-in configurations we've found to be best practice for most organizations, there may be times when you need a different check-in procedure, such as checking in groups by birthdates or manually checking individuals out of events. Let's look at the additional check-in options available.

## Configuring by Birthdate

Configuring check-in by age range means less work for you when it comes to managing groups. Students simply move up into the next age group or grade without you having to update group names. There may be situations, though, where you want to check in groups by birthdate range, such as when you want to keep a group of children together as they get older. While this configuration allows groups to move together, it will require the group names to be continually updated as the grade level of the group changes.




To configure check-in groups by birthdate range, follow these steps:

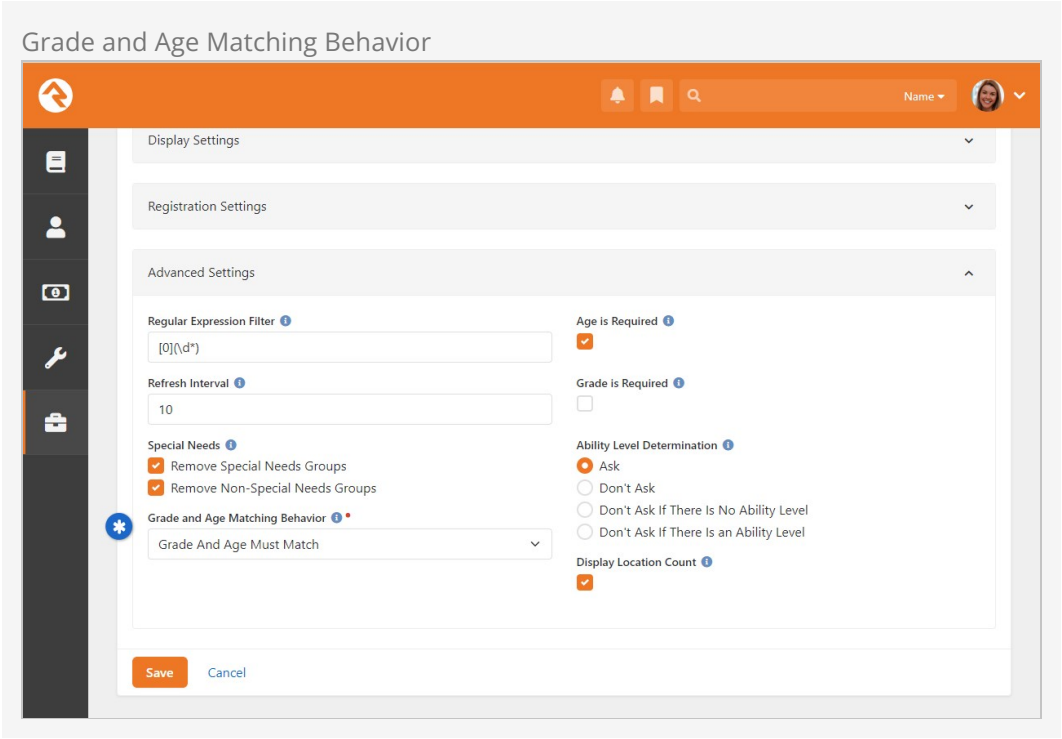
1. Go to `Admin Tools > Check-in > Check-in Configuration`

2. Select the configuration you want to modify.
3. In the Areas and Groups section, click the Area of the group you want to modify. Rock displays the check-in options for that area.
4. From the Inherit from dropdown menu, select either Check in by Age or Check in by Grade. Either option will display the birthdate range option in the group.
5. Click Save.
6. In the Areas and Groups section, click the group you're modifying. The birthdate range option will now be displayed in the Check-In section.
7. Select the beginning and ending birthdates from the calendars in each field to set the range.
8. Click Save.

For more details on how Rock handles grades and promotion from one grade to the next, see our `Person and Family Field Guide`.

## Grade and Age Matching Behavior

Every organization does check-in a bit differently and that applies to determining which groups a person is eligible to check into. To accommodate this, we've added a feature that provides fine-tuned control over group filtering. Let's walk through the options to clarify.



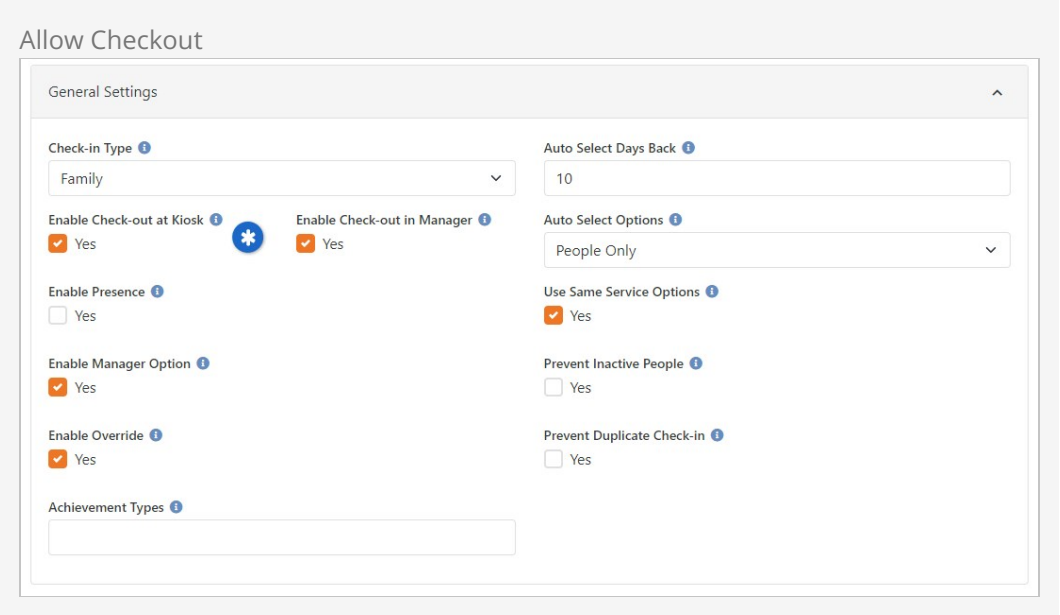

- **Grade And Age Must Match:** This is the typical, out-of-the-box behavior Rock uses for filtering. If a group has a Grade Range, Age Range, and Birthdate Range, the logic is: the grade must match, *and* either the age or birthdate must match.
- **Age Match Not Required:** With this option, if a grade match is possible (i.e., a grade range is specified and the person has a grade), then no age check is performed. For example, if Noah is 11 and in 6th grade, and group "A" specifies

Grades 4–6 and Ages 12–14, then he will match the group. Conversely, if group "B" specifies Grades 2–3 and Ages 12–14, then he will not match the group because the grade check determined "no match" (as Noah is not in Grades 2–3).

- **Prioritize Grade Over Age:** The matching logic starts with the *Age Match Not Required* option; however, an additional step is performed -- any groups that did *not* match by grade are excluded. For instance, let's say you have a preschool room (age-based) and a kindergarten room (grade-based). Kindergartners who are also 4 or 5 years old would normally get a choice between the two rooms, even though they really shouldn't be in the preschool room. The *Prioritize Grade Over Age* option would check them into the kindergarten room.

## Manual Check-Out

Out of the box, Rock automatically “checks out” individuals when an event end time has passed (it doesn't actually mark them as checked out, they no longer appear in Check-in Manager). However, you can configure Rock to allow individuals to manually check out and set it up to print a check-out label.

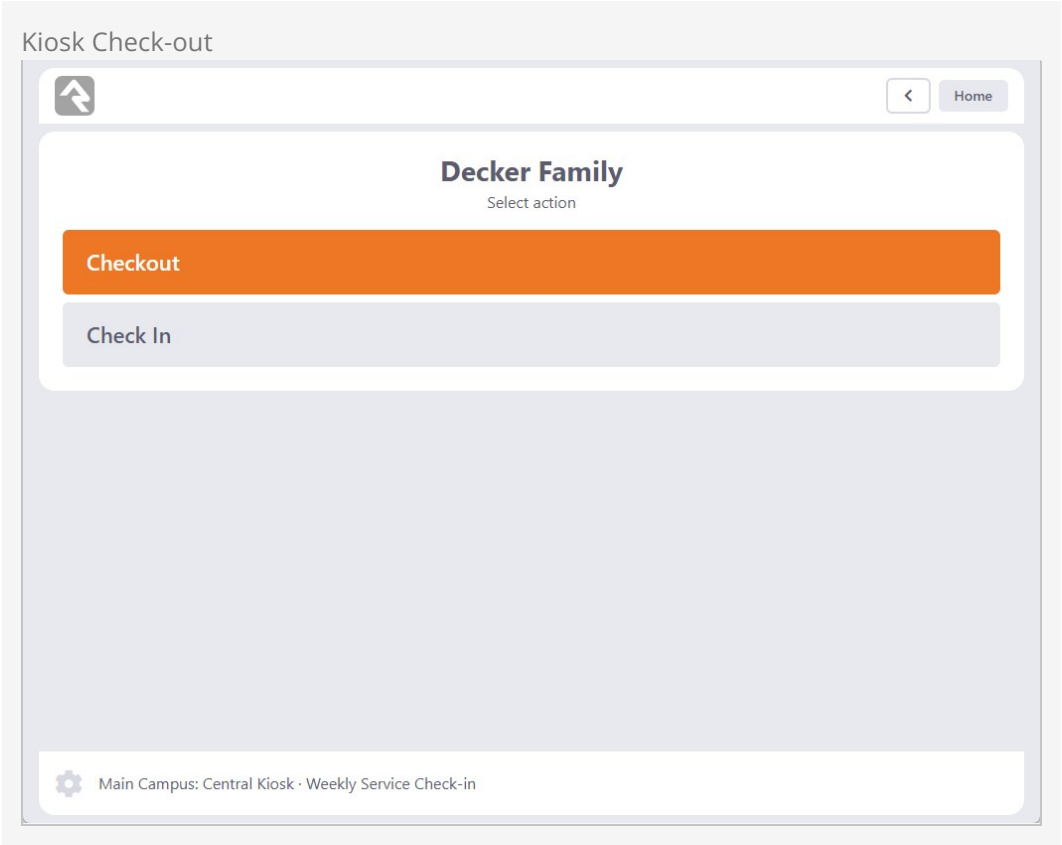



To configure manual check-out, follow these steps:

1. Go to `Admin Tools > Check-in > Check-in Configuration`
2. Select the configuration you want to modify.
3. In the General Settings section, check *Enable Check-out at Kiosk* and/or *Enable Check-out in Manager*.
4. Click Save.

### Kiosk Check-Out

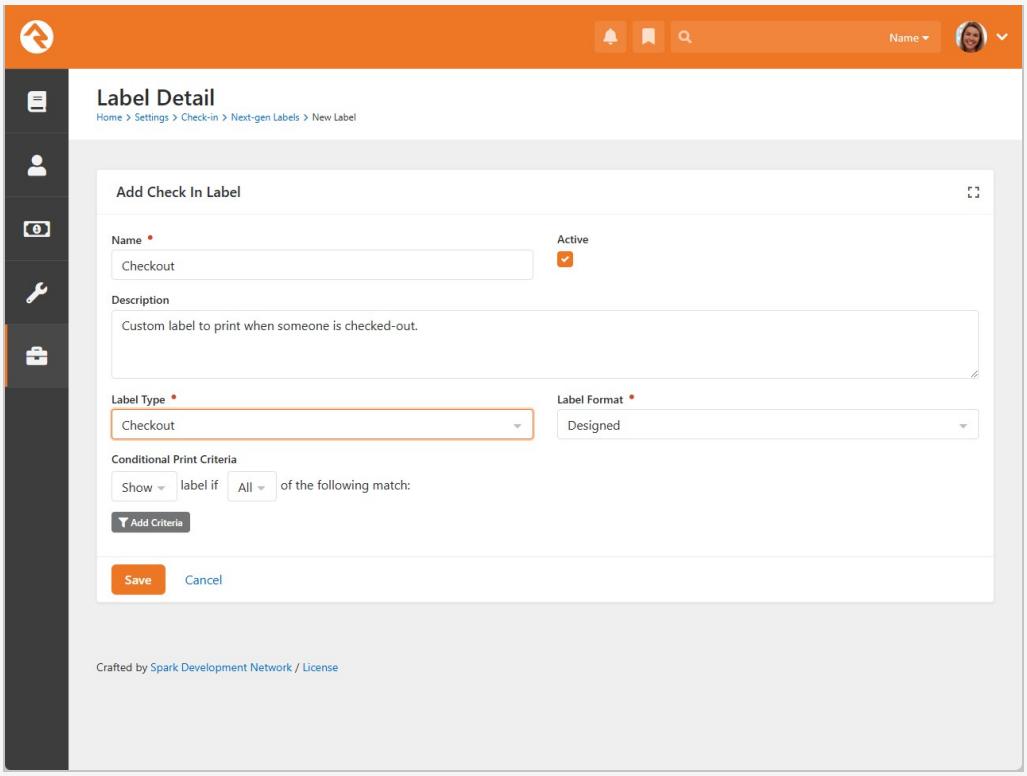
One of the ways to perform a check-out is through the kiosk, similar to checking in. After searching for and selecting a family, you'll see an option to check out individuals who are checked in, or to check in additional people. Simply tap *Check Out* to select individuals to check out.




To print a label at check-out, follow these steps:

1. If you don't already have a Checkout label, go to `Admin Tools > Check-in > Next-Gen Labels`
2. Click ✚ to create a new Checkout *Label Type* label.

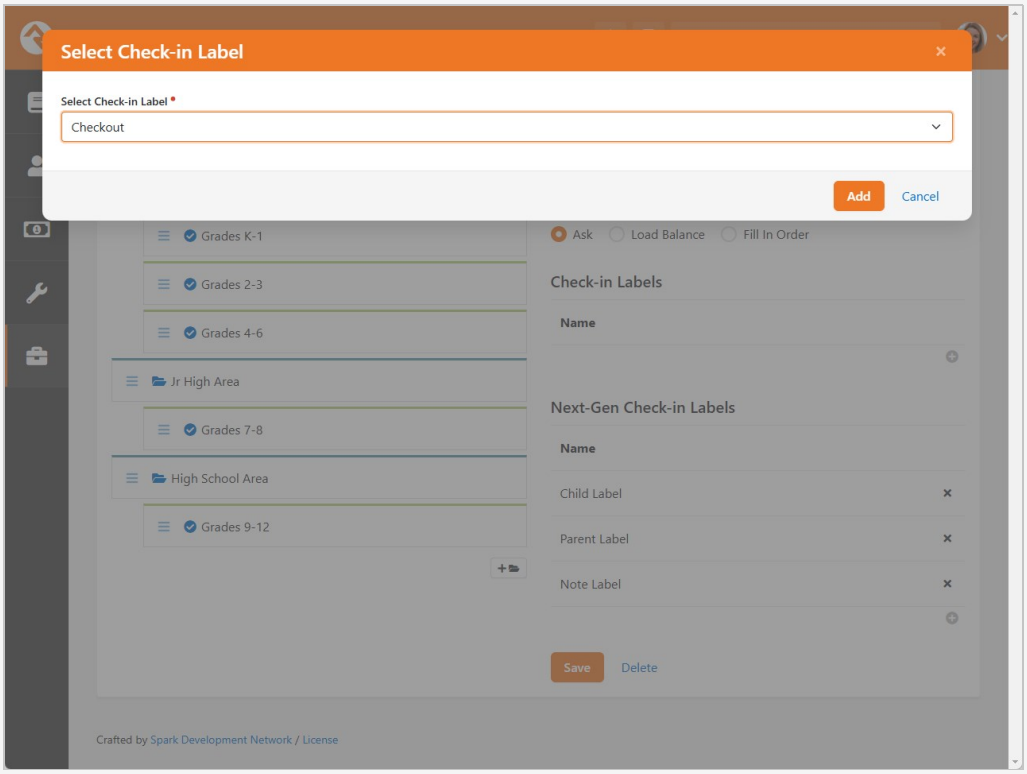
Create a Checkout Label




Once you have a custom Checkout label, just add it like you add other Next-Gen Check-in Labels.

1. Go to `Admin Tools > Check-in > Check-in Configuration`
2. Choose the Area you want to have Checkout labels.
3. Find the *Next-Gen Check-in Labels* list and click the ✚ to add the Checkout label.
4. Click Save.

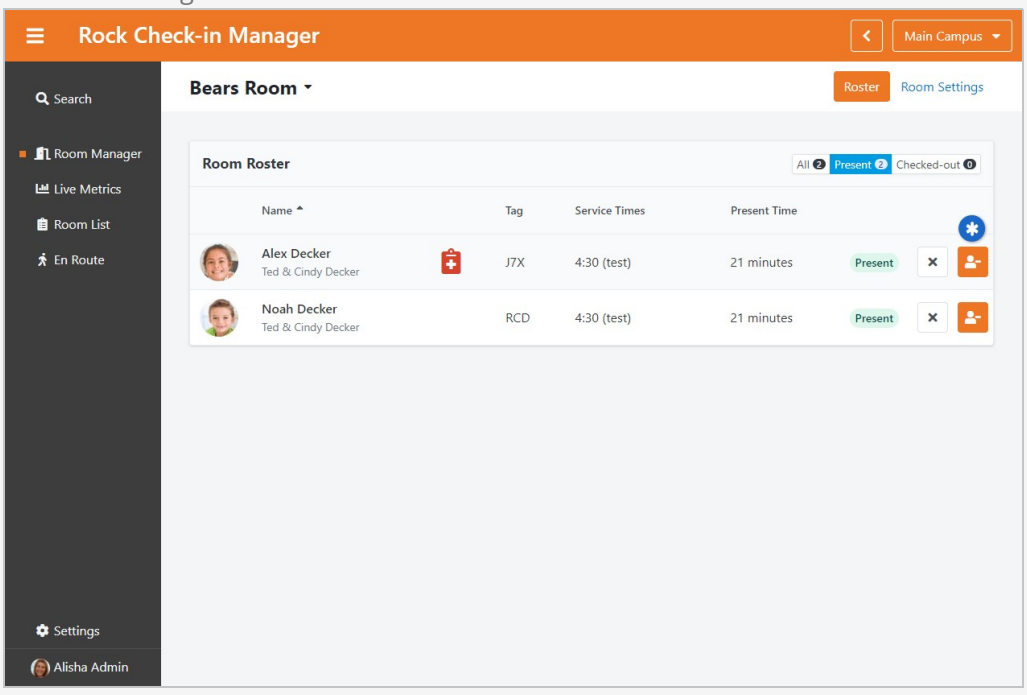
Add a Checkout Label




## Check-in Manager Check-Out

People can also be checked out using the Check-in Manager. From the Check-in Manager Room Roster, navigate to the *Present* tab and click the ☐ button as pictured below. This will check the person out.

Check-in Manager Check-out

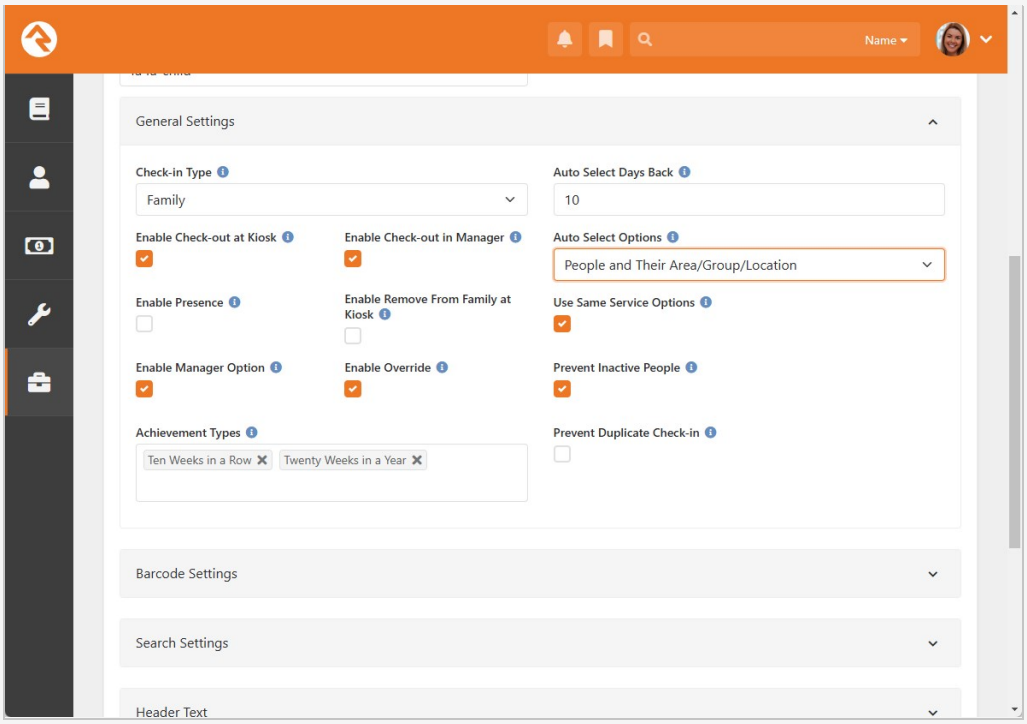


If you ever need to undo a check-out, you can mark the person as *Present* from the *Checked-out* tab on the roster. In order to do this, you must enable the *Enable Mark Present* option in the roster's block settings.

## Auto Check-In

Automatic check-in is an option that works with family check-in and creates a speedier check-in process. With this configuration, when a family checks in, Rock pulls information from their previous check-in based on a certain number of days back. For example, if you have a weekly service, you can set up auto check-in to search a family check-in record ten days back and pull the same options as their check-in for the previous week. This saves them time when checking in. If there is no check-in record within the designated number of days, Rock automatically selects the first eligible option for the family based on age, grade and room availability.

Auto Check-In



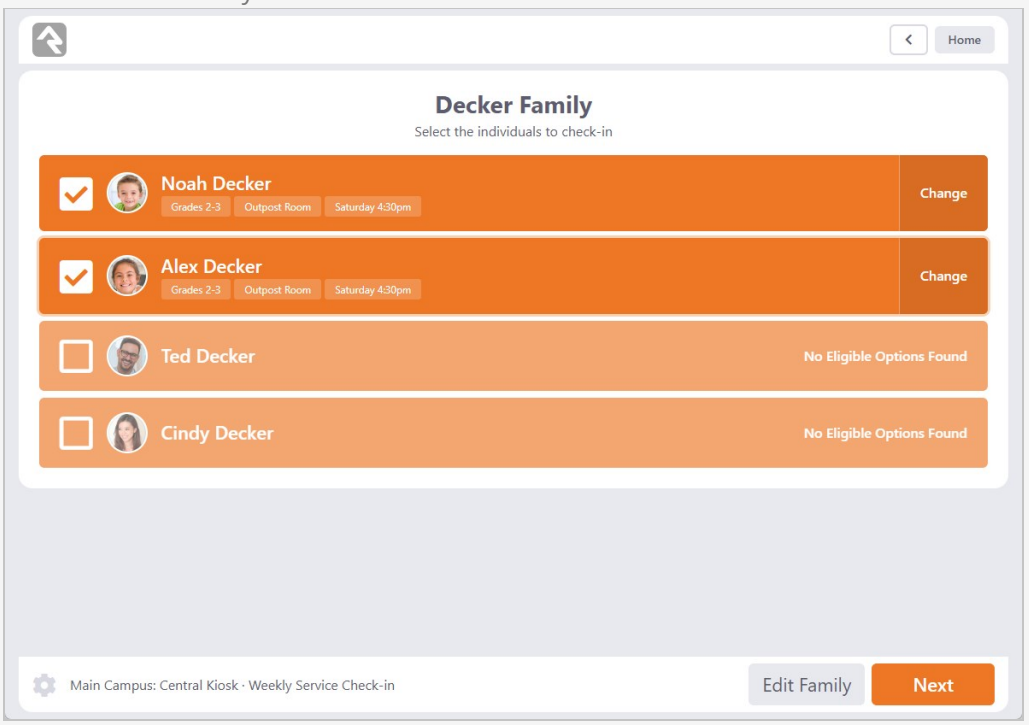

To set up auto check-in, follow these steps:

1. Go to `Admin Tools > Check-in > Check-in Configuration`
2. Select the check-in template you want to modify.
3. Click Edit and open the *General Settings* section.
4. In the *Check-in Type* field, select Family.
5. In the *Auto Select Days Back* field, type in the number of days back you want Rock to search.
6. In the *Auto Select Options* field, select People and Their Area/Group/Location.
7. Click Save.

With the above settings in place, the screen pictured below will appear right away for

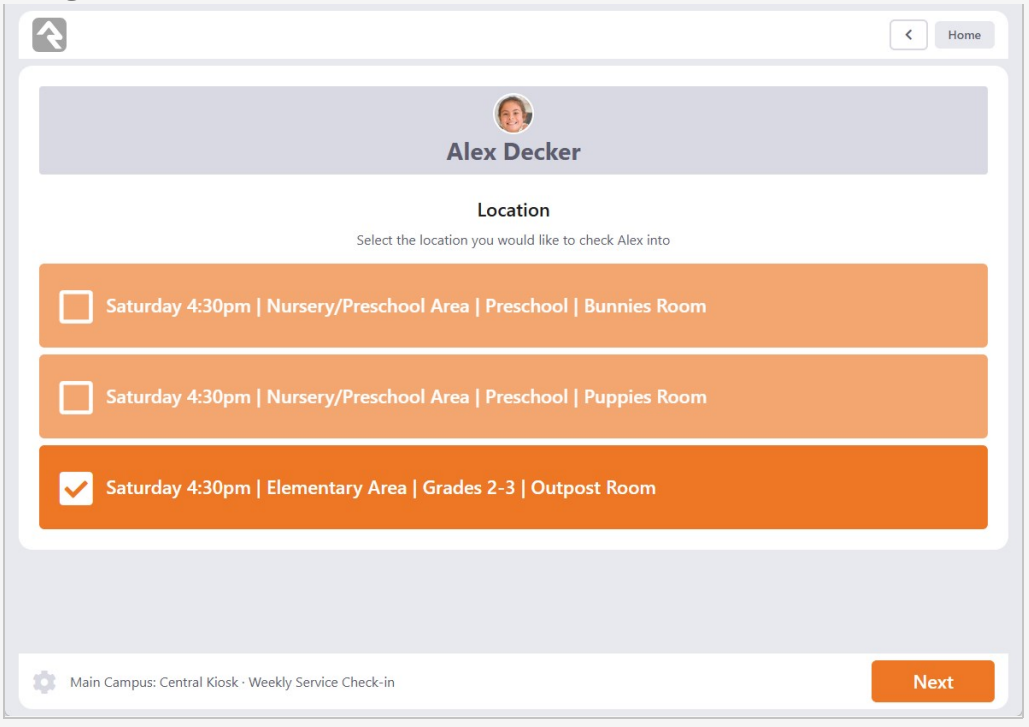
the Decker family based on their prior check-in information.

Auto-Selected Family and Locations




You'll notice the `Change` button for each family member in the screen above. Clicking that button will bring you to the page pictured below, where you can change the auto-selected location.

Change Location for Individual

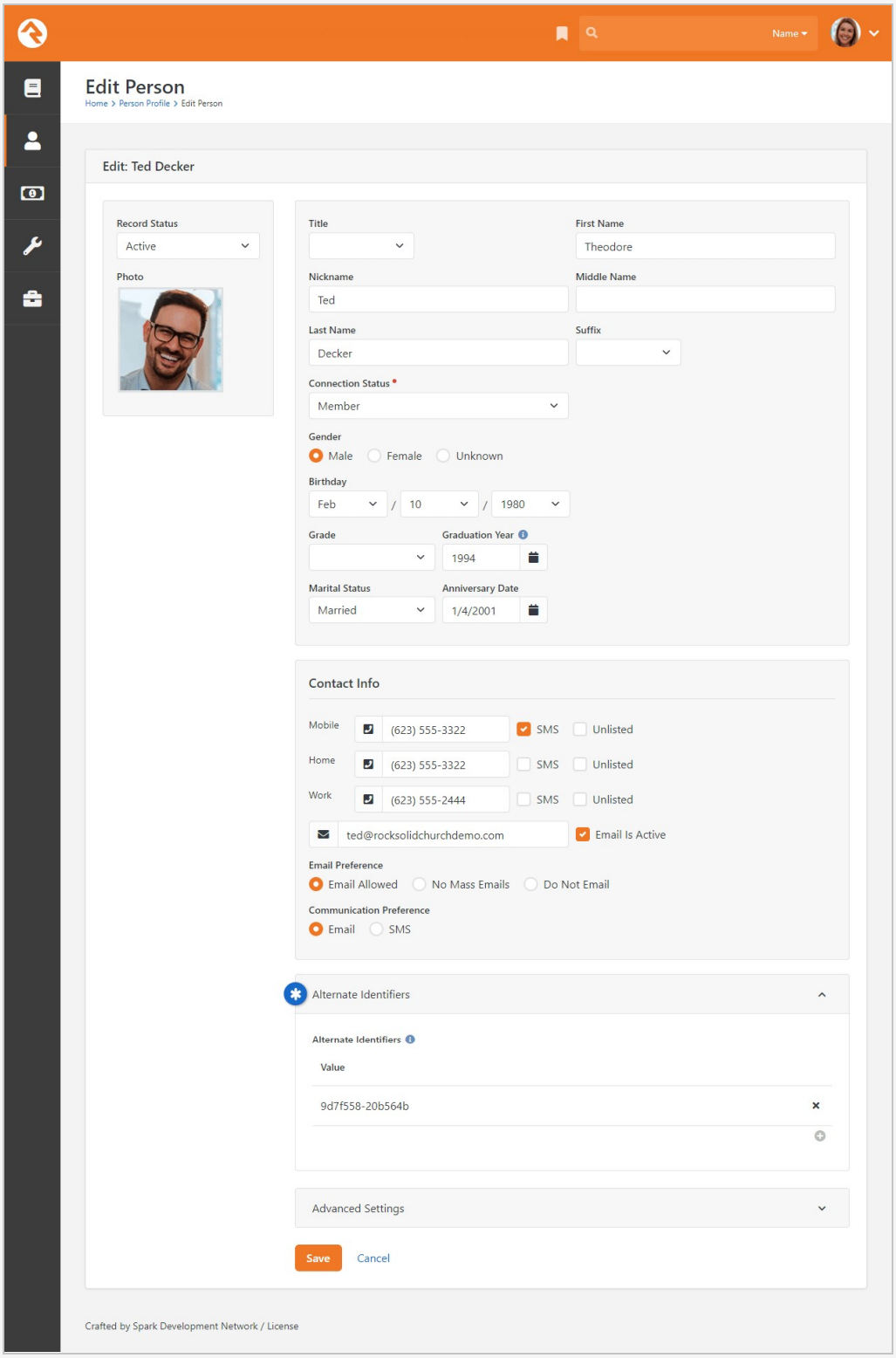


## Barcode Check-In

You can use barcode scanners in addition to your standard check-in methods as long as the barcode scanner you use supports keyboard wedge. You don't need to direct Rock to search for barcodes, though. Once installed, the scanner waits at the Welcome screen, ready to check people in by barcode key. You do, however, need to match up barcodes with person records in Rock, but this process is easy. See the steps below. When a person's barcode is scanned, Rock automatically identifies their family and checks them in. This system can be used for check-out as well.

> ### Barcode Scanner Settings
>
> Rock expects a carriage return at the end of the scanned data, which must be automatically added by the scanner. To configure your Zebra/Motorola device, follow the instructions here. Consult the manufacturer's instructions for other brands.

Check-In Identifiers




To associate barcodes with people, follow these steps:

1. Go to a person's profile page.
2. Click the edit icon at the top right of their person profile page. (In past versions, alternate identifiers were stored on a family rather than an individual—please

don't be confused! We're editing the person record itself now, not the family).

3. Click ✚ to add an Alternate Identifier in the section shown above.
4. Click in the Alternate Id field in the pop-up dialog to set its focus.
5. Scan the barcode using the barcode reader. The barcode number will be captured in the Check-in Identifier field.
6. Click Save on the pop-up dialog, and then be sure to also click Save on the Edit Person page. It will return you to their profile, and the check-in barcode should work for their family now.

> **Barcodes and the Welcome Screen**
>
> Barcodes can be scanned at the Welcome screen. One way to make this option clear to members approaching a check-in kiosk is to modify the button on the Welcome screen to indicate barcode scanning is an option. For example, you could customize the button to read "Scan or Search by Name". To customize the button on the Welcome screen, locate the Welcome page in `Admin Tools > CMS Configuration > Pages`. Click the ⚙ button to view the page's block properties, then change the text in the *Check-in Button Text* field to whatever you'd like the button to say. Click `Save` to save your changes.

### Barcode Readers

Scanning a barcode printed on paper is easy. Reading a code presented on a mobile device screen is a different story. You'll want to make sure that the reader you purchase is able to read a code from a device screen. These types of readers typically use cameras for the task instead of the old school laser.

While there are numerous readers on the market that will work, we have found the Zebra DS457 fixed mount scanners to work very well. You'll often find this exact model from Motorola. In 2014 Zebra purchased Motorola's scanning business. You'll also sometimes see the same model from Symbol. Turns out Motorola owned Symbol...

Either way the scanner works well and can be flush mounted to a surface, or you can purchase a moveable arm stand (Symbol part 20-60136-02R) or a wall bracket (Zebra KT-145344-01).

> **Buyers Tip**
>
> Often these readers do not come with a cable. Be sure to read carefully to see if it's included. If not, you'll most likely want to purchase Zebra part CBL-58926-04 USB Cable Assembly, 9-Pin Female Straight Scanner Connector, Straight Cable, 6' Length.

The built-in cameras on recent iPad models can read codes very well. If you're using an iPad for check-in you won't need to purchase a separate reader. You might want a reader even if you have an iPad, to support different types of check-in. A reader might be better for weekly services, while an iPad is definitely more practical for checking kids

onto a bus.

### Generating QR Codes

Rock has a feature that lets you generate QR codes based on a person's Alternate Identifier using `GetQRCode.ashx`. In most cases you'll probably want to include the QR code in a communication to the person, so they can have it on their phone when they go to check in.

Including a QR code in your communication (or elsewhere) is fairly easy. The key is that you provide a value for the `data` parameter. This is what's used to create the content of the QR code. The below example can be copied into an email, using the person's Alternate Identifier for the `data` parameter. In this example you can control the size of the QR code image by changing the `dim` variable value.

```
{% assign dim = 200 %}
{% assign altId = Person | GetPersonAlternateId %}
<img src="{{ 'Global' | Attribute:'PublicApplicationRoot' }}GetQRCode.ashx?data={{ altId }}
" height="{{ dim }}" width="{{ dim }}">
```

## RFID Check-In

You can also use RFID readers during check-in. Setting up RFID is the same process as setting up a barcode; you're just using a different input type. To work with Rock, your RFID reader must support keyboard wedge. If your device doesn't support keyboard wedge, the free Smartlux 232 Key utility can be used to emulate this functionality. Once the RFID is associated with a family, there is no need for further configuration. 232 Key captures information for whichever screen has focus. For example, a member can scan their RFID card from the welcome screen, and Rock will take them through the check-in process.

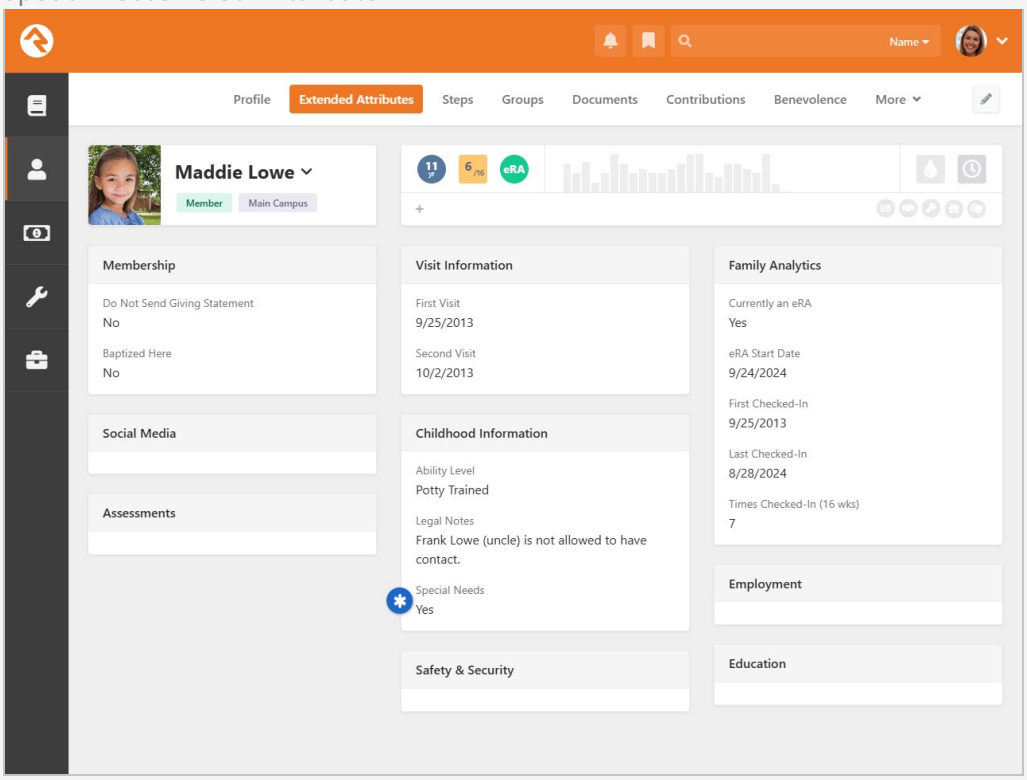
## Configuring for Special Needs

If you have a special needs population, Rock makes it easy to set up check-in so they're guided to the right spot every time. No matter how you want to structure check-in, Rock gives you the tools to make it work smoothly for everyone, making everyone feel welcome.

> **Next-Gen Check-in**
>
> To use these settings, make sure you're running Next-Gen Check-in and that your Rock system is updated to version 16.7 or later. (For information on how to configure special needs check-in in previous versions, check the v15 manual.)

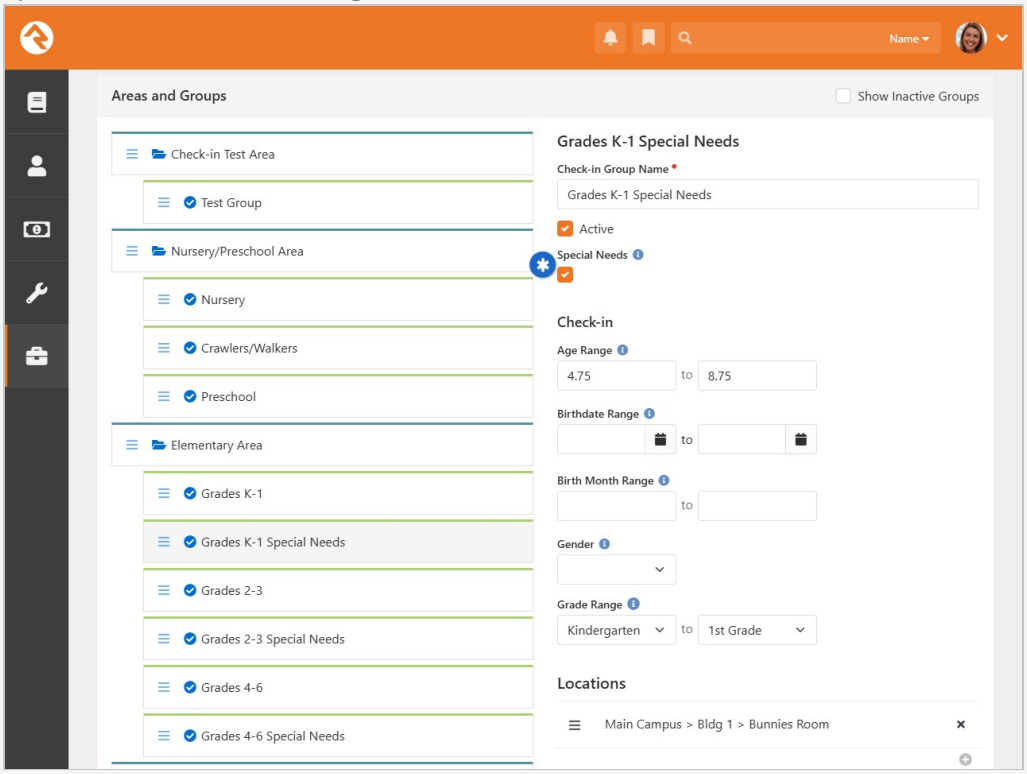
The first thing you'll need to do is identify individuals with special needs. This is tracked by a Person Attribute called "Special Needs". As pictured below, setting this attribute to "Yes" is all that's needed.

Special Needs Person Attribute




Next, make sure you have groups set aside for people with special needs. If these groups don't already exist, you may need to create some, as shown below. Or you can choose to keep your existing groups the way they are and mix special needs people with non-special needs people. However you want to approach it, just be sure that the *Special Needs* setting in your configuration (`Admin Tools > Check-in > Check-in Configuration`) is turned on for each applicable group.

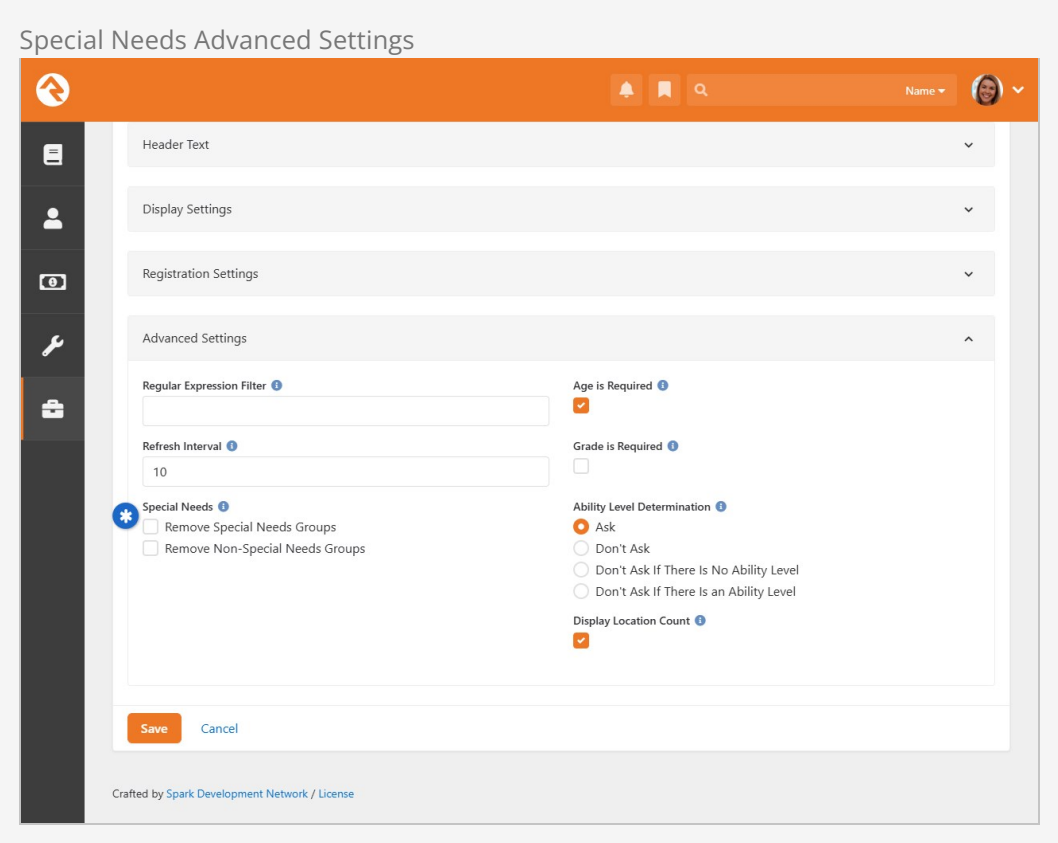
Special Needs Check-in Configuration




Finally, decide how you want check-in to work for your special needs groups. Consider questions like, do you want special needs people to be able to check into non-special needs groups? Should special needs groups be available to everyone, or only those marked as special needs?

As pictured below, there are two simple settings in the check-in configuration under Advanced Settings to help you control how check-in will work:

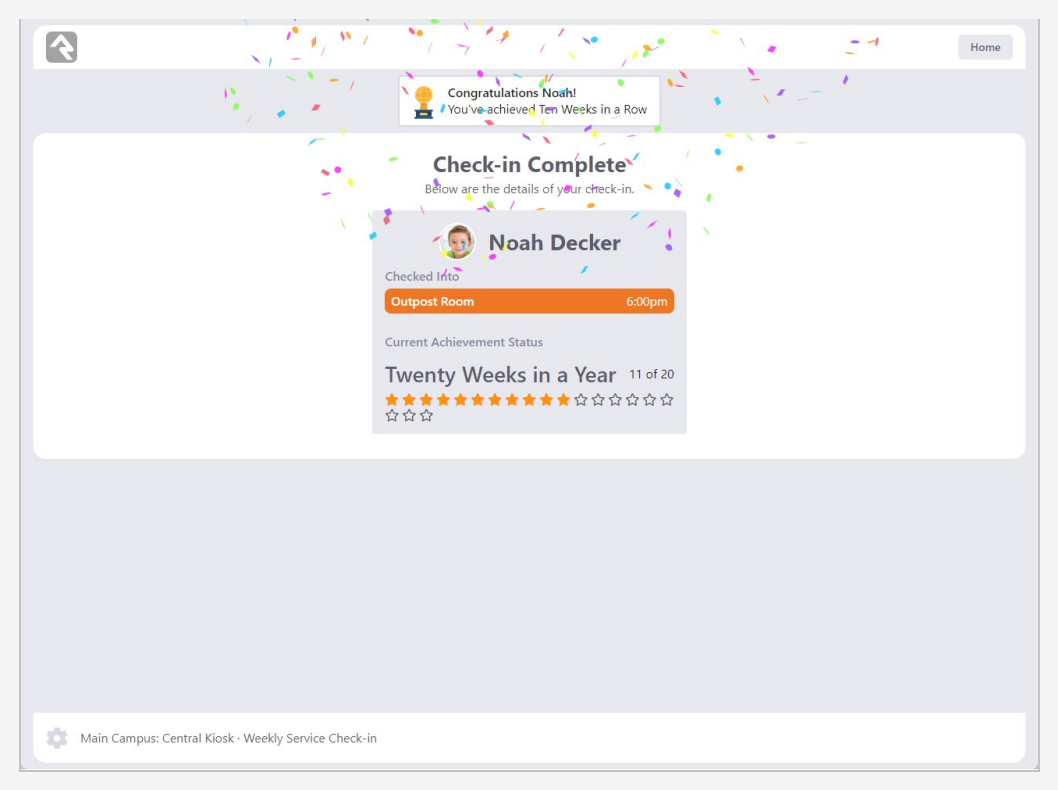
- **Remove Special Needs Groups:** This setting ensures non-special needs people won't see special needs groups as options during check-in. In other words, only those who are designated as special needs will be able to check in to special needs groups.
- **Remove Non-Special Needs Groups**This setting limits people with special needs to special needs groups only, preventing them from checking in to non-special needs groups.




With these configuration settings in place, you're ready to start checking in special needs populations.

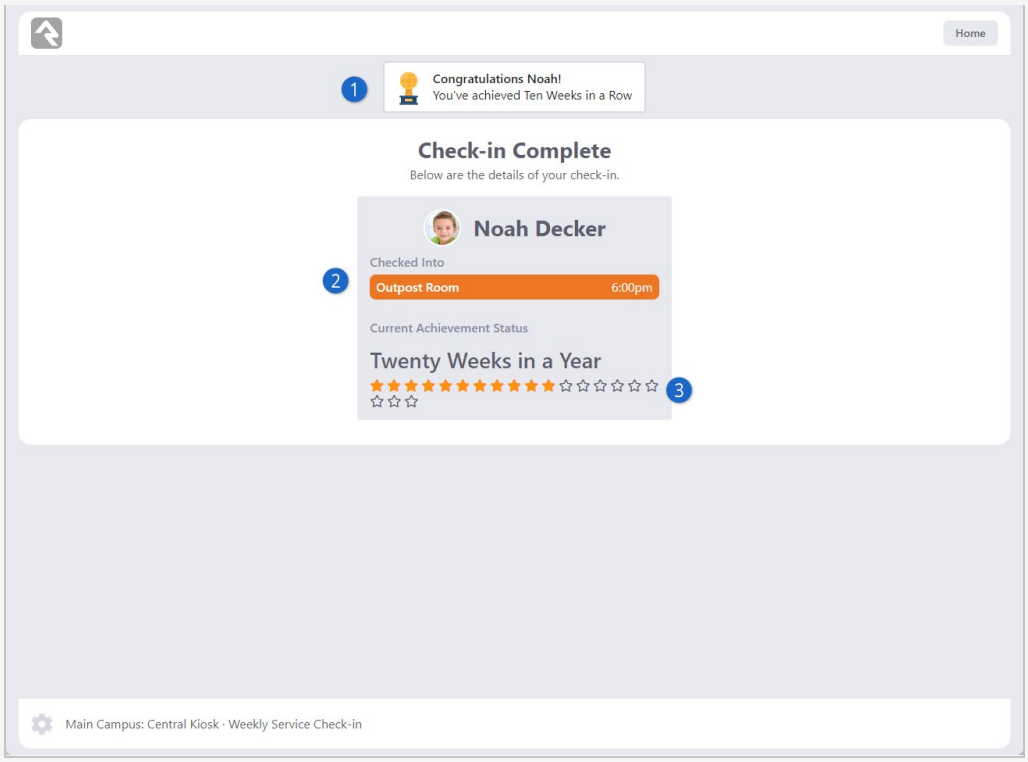
# Check-in Celebrations

If you've accomplished a goal, you deserve to celebrate it! Check-in celebrations are a recognition the person sees (and hears) when their check-in results in an achievement being earned. This is a great way to track and encourage engagement at your organization.



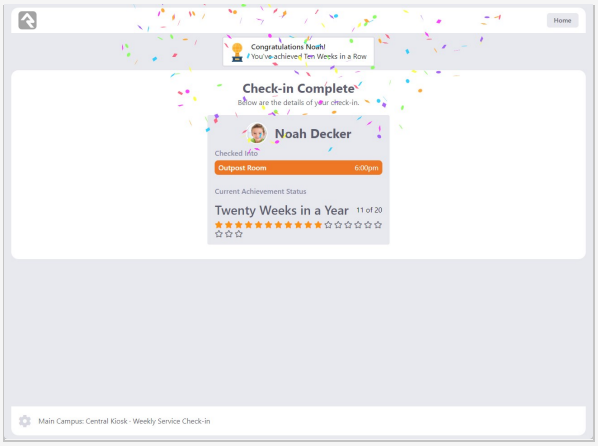

The check-in confirmation screen shows more than just a celebration when an achievement has been earned. The person can also see their history of earned achievements, and their progress toward the next time they will earn an achievement. Let's break down all the information below.

Check-in Celebration Screen




1. **Celebrations**
   This area shows the achievements that were completed with the current check-in. In this example, Noah Decker's check-in resulted in the Ten Weeks in a Row achievement being earned and celebrated.
2. **Check-in Confirmation**
   The standard check-in confirmation displays information about the check-in (location, schedule, group, etc.).
3. **In Progress**
   This shows the streak progress Noah has toward this achievement. In this example we see he's attended eleven out of the twenty weeks needed to get this achievement.

How a celebration is displayed is built into each check-in theme. Each core theme that ships with Rock has its own celebration, as detailed below. Each celebration has both an animation and a sound effect, giving the person something to see and hear. Your custom themes will need to implement their own celebrations using CSS and JavaScript.




**Next-Gen Check-in Theme**
See a colorful display of confetti bursting from the screen as trumpets proclaim the achievement has been earned.

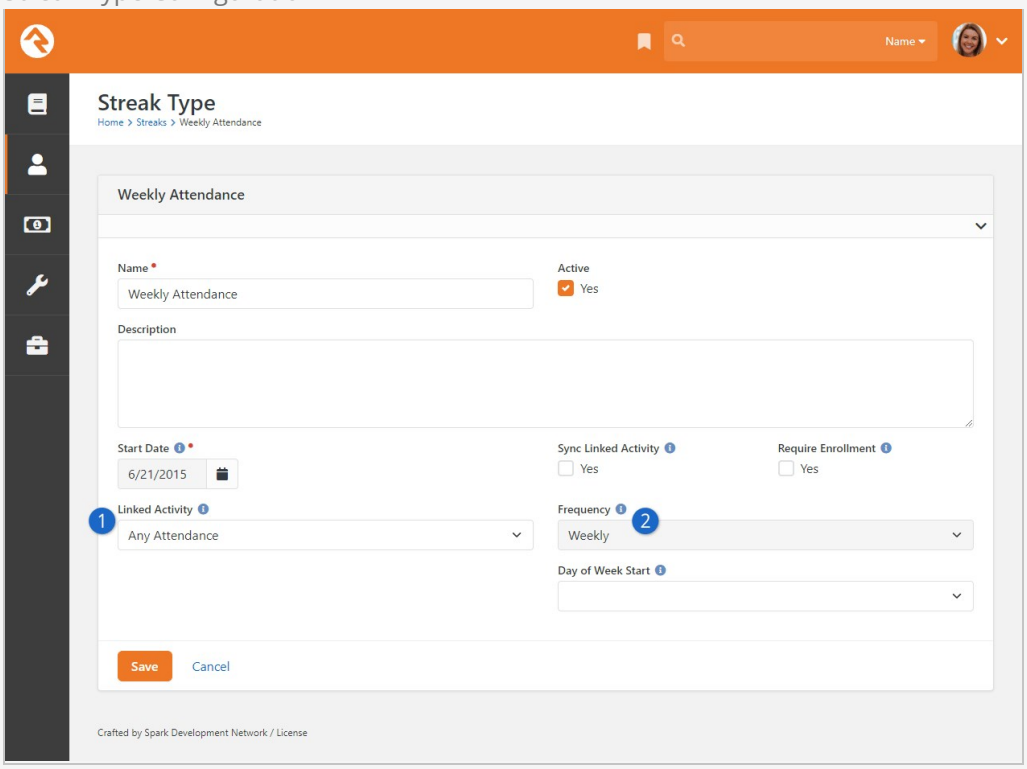
## Setting Up Celebrations

Check-in celebrations occur when an achievement's goal has been met for the person checking in. So, before you get started, you'll need to have at least one achievement type in place. Because we're working with check-in, the achievement type you pick will most likely be tied to a streak.

### Streaks and Achievements

The first thing you'll need to do is set up the streak type you'll be using under `People > Streaks`. The example pictured below will track weekly attendance.

Streak Type Configuration

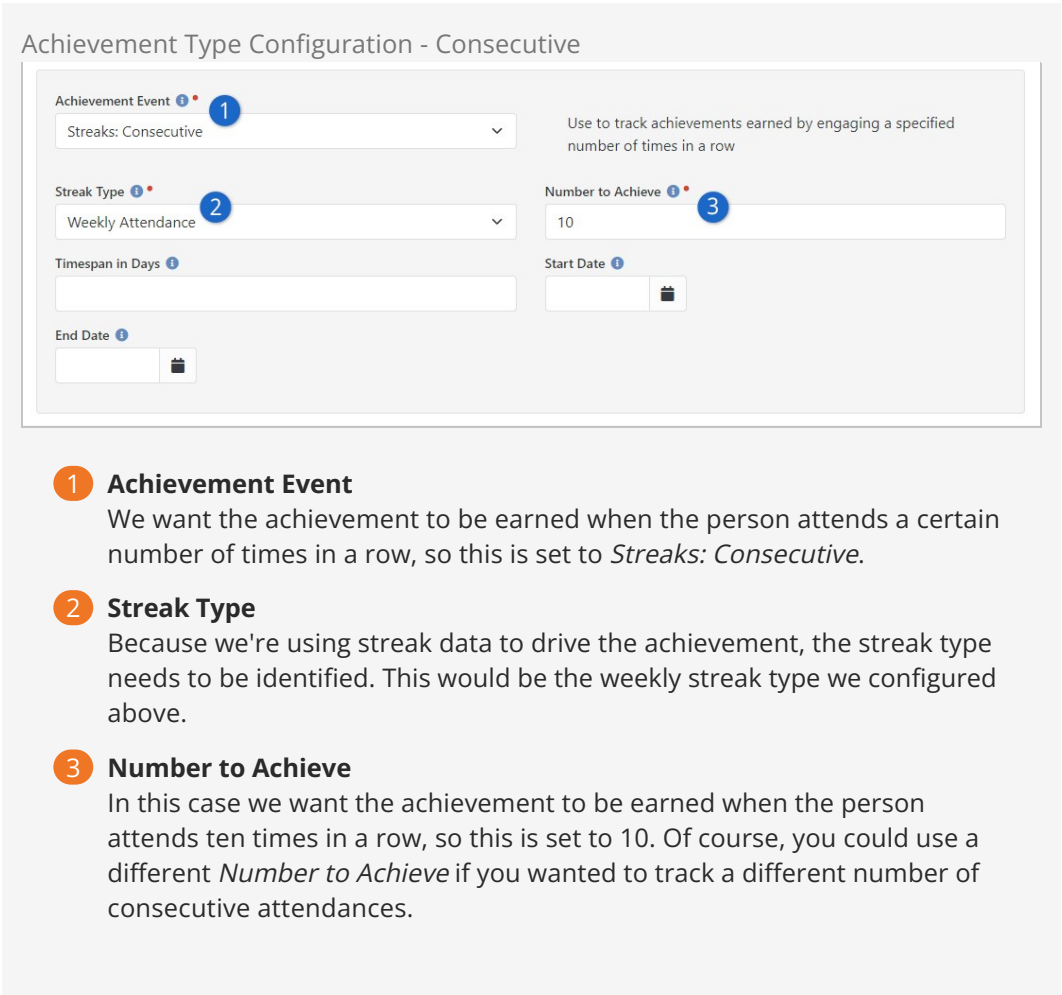



1 **Linked Activity**
Setting this to *Any Attendance* will track attendance in any group. For instance, this would count both weekly service check-ins and small group attendance.

2 **Frequency**
Here you can choose either *Daily* or *Weekly*. In this example we're using *Weekly* to track how many weeks a person has attended.

With a streak type in place, we can now configure achievements by navigating to `People > Achievements`. As it relates to check-in, you'll probably want to use one of two basic kinds of achievements.

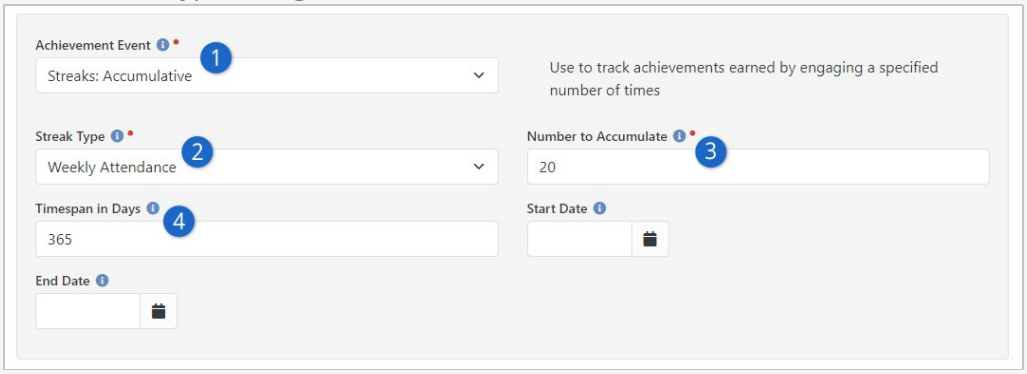
The first type is for attending a certain number of times in a row. For instance, you might have an achievement that's earned if the person attends ten weeks in a row. Your achievement type would be set up as pictured below.




1. **Achievement Event**
   We want the achievement to be earned when the person attends a certain number of times in a row, so this is set to *Streaks: Consecutive*.
2. **Streak Type**
   Because we're using streak data to drive the achievement, the streak type needs to be identified. This would be the weekly streak type we configured above.
3. **Number to Achieve**
   In this case we want the achievement to be earned when the person attends ten times in a row, so this is set to 10. Of course, you could use a different *Number to Achieve* if you wanted to track a different number of consecutive attendances.

The second type of achievement you might use would track attendance over a certain period of time. For instance, you might configure an achievement that's earned if the person attends twenty weeks within a year. The achievement type in that case would be configured as shown below.

Achievement Type Configuration - Accumulative




1. **Achievement Event**
   This is set to *Streaks: Accumulative* because we want the achievement to be earned when the person accumulates twenty attendances.
2. **Streak Type**
   This achievement can use the same streak type as the prior example because we're still looking at attendances by week.
3. **Number to Accumulate**
   This is set to 20 to show that we want the achievement to be earned when the person has attended twenty weeks.
4. **Timespan in Days**
   This field is used to indicate that the twenty attendances we're looking for need to occur within a single year (365 days).

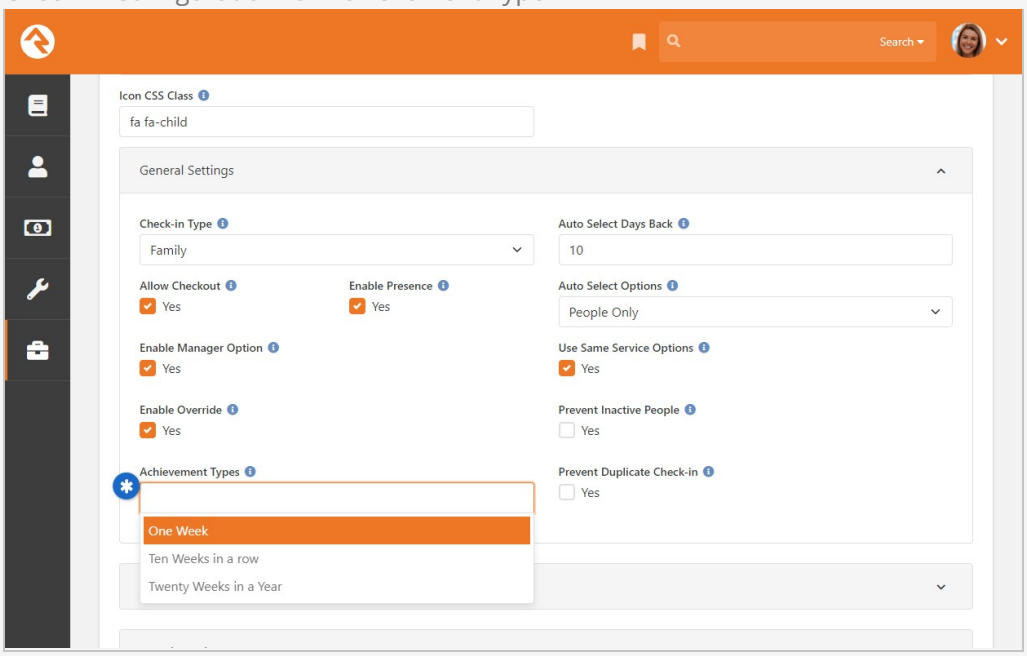
> ### Keeping the Streak Alive
>
> People will get excited as they see their progress toward earning achievements. But some might need a little grace if they miss a week through no fault of their own. In those cases, you can use the Engagement Exclusion Map on a person's streak to forgive missed attendances. This is the best way to keep an unbroken streak going if the person was unable to attend a given week.

For full details on setting up streaks and achievements, check out our `Engagement` guide.

### Check-in Configuration

Once you have an achievement type configured, head to your check-in configuration at `Admin Tools > Check-in > Check-in Configuration`. This is where you'll connect each check-in type to one or more achievement types. For instance, you might track some achievements for your volunteer check-in, and others for weekly service check-in.

Check-in Configuration for Achievement Type




Each achievement type you add will trigger a celebration if the check-in results in the achievement being earned. Even if the check-in doesn't result in a celebration, the person will still see their progress toward each achievement type you've configured here.

That's all you need for check-in celebrations to work. Once you've added achievement types to your check-in configuration, you'll start seeing them in check-in right away. However, there's more you can do to customize the experience.

# Advanced Options

This chapter is intended for those who need to configure some of the advanced options which may not be enabled out-of-the-box in Rock.

## Advanced Option - Check-in Rule: Already Enrolled in Group

You might wonder why you would use the *Prefer Enrolled Groups* option. For example, let's say there is a general group called "General 2nd" for all 2nd graders and a set of "permanent" small groups for the same grade, where kids are assigned to specific leaders. These small groups use the **Already Enrolled In Group** rule.

- On Noah's first visit, he checks into the "General 2nd" group since it's his only match.
- During the week, he is assigned to a permanent group.
- On his next visit, Noah matches both the "General 2nd" group and his permanent group.

If **Matching Logic** is set to **Must Be Enrolled**, both groups are available for Noah to choose. If set to **Prefer Enrolled Groups**, the "General 2nd" group is removed, ensuring Noah checks into his assigned small group with his leader.

## Advanced Option - Allowing Anonymous Access

Out of the box, the NextGen check-in system requires authentication to interact with it. However, to break free of this requirement follow these steps:

1. Update page security of the next-gen check-in pages to allow anonymous.
2. Configure a way to prevent access to these pages from undesired sources such as the public Internet.

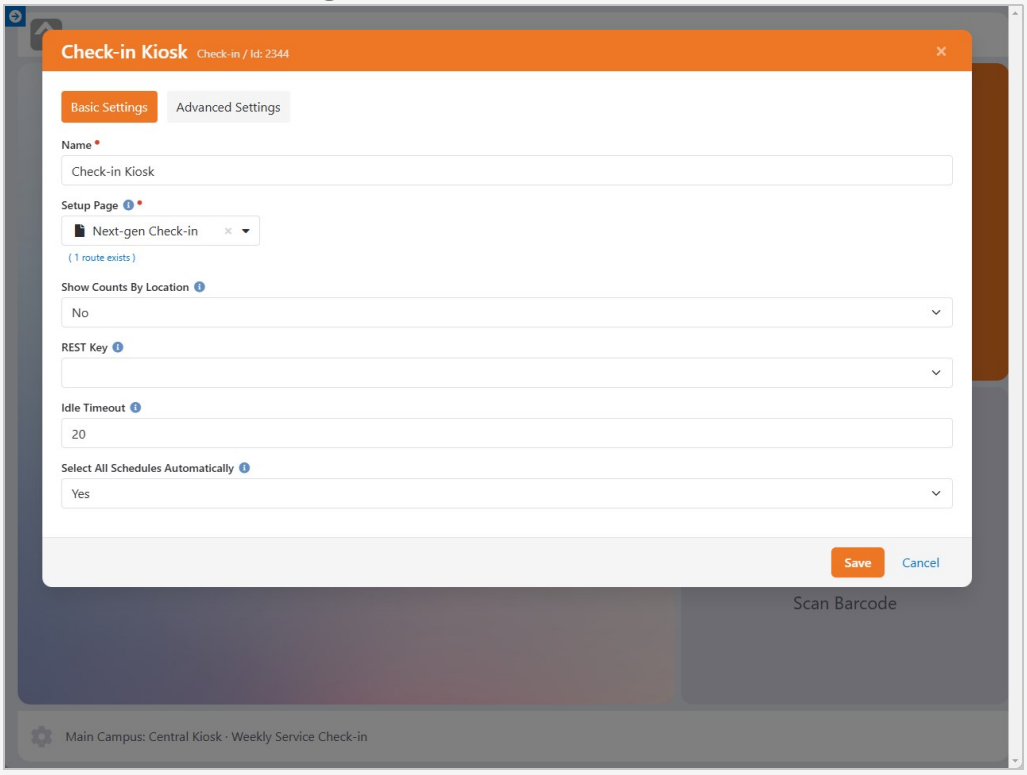
> ⚠ Warning!
> This is critical because otherwise you will expose and leak the REST api key you set up in the next two steps!

3. Create a REST API key and add it to the *APP - Check-in Devices* security role (or otherwise give it access to the check-in v2 API endpoints).
4. Edit *Check-in Kiosk* block settings and set the REST API key to use for anonymous access.

## Advanced Option - Select All Schedules Automatically

There is also a setting in the new *Check-in Kiosk* block called *Select All Schedules Automatically* that, when enabled, will automatically select all available schedules instead of asking the individual to make a selection.

Check-in Kiosk Block Settings




## Appendix - Label Types

For those looking to create custom check-in labels, this section provides an overview of different label types and tips on when to use each. You'll also find a list of available Lava merge fields and data for each label type to help guide your design choices.

- **Family:** Only one instance of this label is printed for a check-in session (i.e. trip through the kiosk). The following merge fields are available in this label type:
  - `AllAttendance` (an array of `LabelAttendanceDetail`)
  - `Family` (type `Group`)
  - `JustCompletedAchievements` (an array of string)
  - `JustCompletedAchievementIds` (an array of int)
  - `CheckInDateTime` (type DateTime)
  - `CurrentDateTime` (type DateTime)
  - `NickNames` (an array of string)
  - `FirstNames` (an array of string)
  - `LastNames` (an array of string)
  - `AreaNames` (an array of string)
  - `GroupNames` (an array of string)

    - `LocationNames` (an array of string)
    - `ScheduleNames` (an array of string)
- **Person:** One label is printed for every person checked in during that session. The following merge fields are available in this label type:
    - `Person` (type `Person`)
    - `PersonAttendance` (an array of `LabelAttendanceDetail`)
    - `AllAttendance` (an array of `LabelAttendanceDetail`)
    - `Family` (type `Group`)
    - `JustCompletedAchievements` (an array of string)
    - `JustCompletedAchievementIds` (an array of int)
    - `InProgressAchievements` (an array of string)
    - `InProgressAchievementIds` (an array of int)
    - `PreviouslyCompletedAchievements` (an array of string)
    - `PreviouslyCompletedAchievementIds` (an array of int)
    - `IsFirstTime` (type bool)
    - `AreaNames` (an array of string)
    - `CheckInDateTime` (type DateTime)
    - `CurrentDateTime` (type DateTime)
    - `GroupNames` (an array of string)
    - `GroupRoleNames` (an array of string)
    - `LocationNames` (an array of string)
    - `ScheduleNames` (an array of string)
    - `SecurityCode` (type string)
- **Attendance:** One label is printed for every Attendance record record, i.e. if you check Noah into the 9am service Bears room AND the 11am service Bears room, he will get 2 of these labels because 2 attendance records were created. The following merge fields are available in this label type:
    - `Attendance` (type `LabelAttendanceDetail`)
    - `Person` (type `Person`)
    - `Location` (type NamedLocationCache)
    - `PersonAttendance` (an array of `LabelAttendanceDetail`)
    - `AllAttendance` (an array of `LabelAttendanceDetail`)
    - `Family` (type `Group`)
    - `JustCompletedAchievements` (an array of string)
    - `JustCompletedAchievementIds` (an array of int)
    - `InProgressAchievements` (an array of string)
    - `InProgressAchievementIds` (an array of int)
    - `PreviouslyCompletedAchievements` (an array of string)
    - `PreviouslyCompletedAchievementIds` (an array of int)
    - `CheckInDateTime` (type DateTime)
    - `CurrentDateTime` (type DateTime)
    - `GroupRoleNames` (an array of string)
- **Checkout:** One label is printed for each person during check-out. The following merge fields are available in this label type:

    - `Attendance` (type `LabelAttendanceDetail`)
    - `Person` (type `Person`)
    - `Family` (type `Group`)
    - `CheckInDateTime` (type DateTime)
    - `CheckoutDateTime` (type DateTime)
    - `CurrentDateTime` (type DateTime)
    - `GroupRoleNames` (an array of string)
- **Person Location:** One label is printed for each person at each location. If you check Noah into the 9am service Bears room AND the 11am service Bears room, he will get one of these labels. I fyou check Noah into the 9am service Bears room AND the 11am service Kittens room, he will get two of these labels. The following merge fields are available in this label type:
    - `Person` (type `Person`)
    - `Location` (type NamedLocationCache)
    - `PersonAttendance` (an array of `LabelAttendanceDetail`)
    - `LocationAttendance` (an array of `LabelAttendanceDetail`)
    - `AllAttendance` (an array of `LabelAttendanceDetail`)
    - `JustCompletedAchievements` (an array of string)
    - `JustCompletedAchievementIds` (an array of int)
    - `InProgressAchievements` (an array of string)
    - `InProgressAchievementIds` (an array of int)
    - `PreviouslyCompletedAchievements` (an array of string)
    - `PreviouslyCompletedAchievementIds` (an array of int)
    - `AreaNames` (an array of string)
    - `CheckInDateTime` (type DateTime)
    - `CurrentDateTime` (type DateTime)
    - `GroupNames` (an array of string)
    - `GroupRoleNames` (an array of string)
    - `IsFirstTime` (type bool)
    - `ScheduleNames` (an array of string)
    - `SecurityCode` (type string)

#### Other Merge Fields

Items above such as `Group` or `Person` can be found in your *Model Map* power tool (under `Admin Tools > Settings > Model Map`). However some items such as `LabelAttendanceDetail` and `AchievementBag` are not found there. Therefore, we're including a few more items here to help you understand what these things represent.

- `LabelAttendanceDetail`
    - `Person` (type `Person`)
    - `StartDateTime` (type DateTime)
    - `EndDateTime` (type DateTime?)
    - `IsFirstTime` (type bool)
    - `Area` (type `GroupTypeCache`)

    - `Group` (type `GroupCache`)
    - `Location` (type `NamedLocationCache`)
    - `Schedule` (type `NamedScheduleCache`)
    - `GroupMembers` (an array of `GroupMember`)
    - `SecurityCode` (type string)
    - `JustCompletedAchievements` (an array of `AchievementBag`)
    - `InProgressAchievements` (an array of `AchievementBag`)
    - `PreviouslyCompletedAchievements` (an array of `AchievementBag`)
- `AchievementBag`
    - `Id` (type string, IdKey value)
    - `AchievementTypeId` (type string, IdKey value)
    - `Name` (type string)
    - `Progress` (type decimal)
    - `TargetCount` (type int?)
    - `IsSuccess` (type bool)
    - `IsClosed` (type bool)
    - `StartDateTime` (type DateTime)
    - `EndDateTime` (type DateTime?)