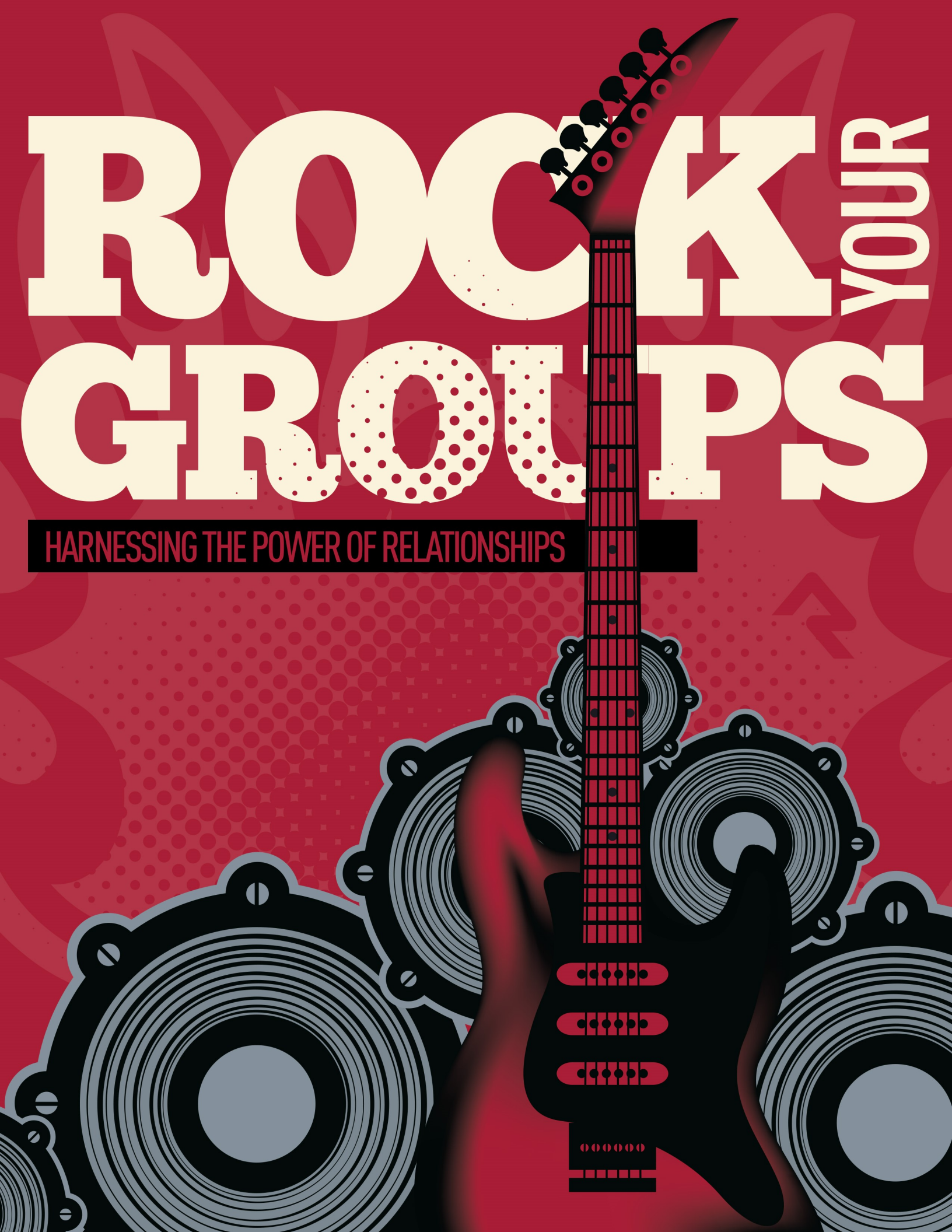


ROCK YOUR GROUPS

HARNESSING THE POWER OF RELATIONSHIPS



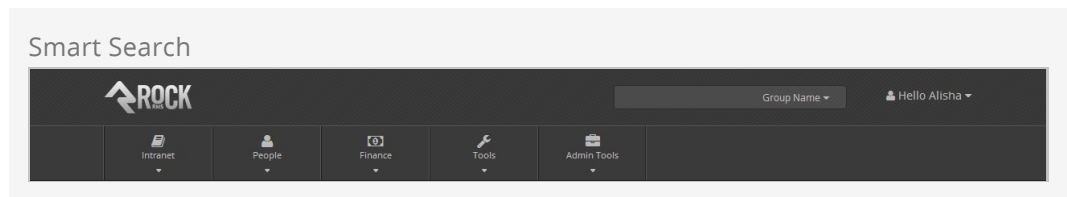
Overview

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

- **Families:** Each family is stored as a group. This is incredibly powerful because families get the same power and functionality as any other *Group Type*. In the beginning you'll want to leave families configured just the way you found them. As you create new *Group Types* and gain more experience with groups, keep in mind that you can add new attributes and additional functionality to the family *Group Type*.
- **Security Roles:** These groups help secure Rock data. While you'll use these groups a majority of the time for security, you'll soon discover that any group in Rock can act as a security role.
- **Check-in Groups:** Rock's check-in features use groups to store the locations where kids can check in and to track attendance.
- **Serving Teams:** While we have big ideas for how serving teams will work in the future, we have configured a simple group type to get you started with tracking your groups.
- **Small Groups:** We've added a generic *Small Group* group type. Feel free to use this as a base to build from if your church has a groups ministry.
- **Small Group Sections:** This group type works in conjunction with the *Small Group* type and acts as a leadership level to provide hierarchy for your groups. Again, feel free to use this type as a launching point for getting started.

Searching for Groups

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



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

Decker

Bible Study

Ted Deck

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

Group Viewer

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

Group Viewer

Group Viewer

Home / Group Viewer

1 Add Group

- Ushers
- Section A
 - Decker Group**
 - Section B

2 Decker Group

Small group with Ted as the group leader.

Parent Group: Section A

Group Attributes

Study Topic: Book of Genesis

Meeting Time: 7:00 PM

3 Edit Delete

Meeting location

Group Members

First Name	Last Name	Role	Status	
Cindy	Decker	Member	Active	✖
Ted	Decker	Member	Active	✖
Alisha	Marble	Member	Active	✖
Bill	Marble	Member	Active	✖

50 500 5,000 4 Group Members

1 Group Tree

This control allows you to drill down through your group hierarchies. You'll want to plan your hierarchies to achieve a good balanced approach. Too deep of a hierarchy will lead to too many clicks to drill down. However, if your hierarchy is too broad, then you will have to scan through long lists of groups to find the one you want.

2 Group Details

Displays information about the group.

3 Action Bar

Options to edit or delete a group.

4 Group Members

List of member inside the group.

Adding a Group

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

currently selected group.

Note

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

Adding a Group

The screenshot shows the 'Adding a Group' interface within the Rock Intranet. The top navigation bar includes the Rock logo, a search bar, and a user profile for 'Hello Alisha'. Below this is a secondary navigation bar with icons for Intranet, People, Finance, Tools, and Admin Tools. The main content area is titled 'Group Viewer' and shows a breadcrumb trail 'Home / Group Viewer'. On the left, there is a sidebar with an 'Add Group' button and a list of existing groups: 'Ushers', 'Section A', and 'Section B'. The main form area is titled 'Add Group' and contains the following fields:

- Name:** A text input field.
- Active:** A checkbox that is currently checked.
- Description:** A large text area for a detailed description.
- Group Type:** A dropdown menu.
- Campus:** A dropdown menu.
- Parent Group:** A dropdown menu showing a group icon.
- Security Role:** A checkbox labeled 'Yes'.
- Member Attributes:** A section with a dropdown arrow.

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

Group Details

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

Editing a Group

Clicking the **Edit** button from the detail section will allow you to edit information about the group and provide additional configuration settings. Each area of the edit screen is discussed below.

Editing a Group

Editing a Group

Rock

Name Hello Alisha

Intranet People Finance Tools Admin Tools

Group Viewer

Home / Group Viewer

Add Group

Ushers

Section A

Section B

Ushers

Serving Team

Name Ushers ☒ Active

Description

General

Group Type Serving Team

Campus

Parent Group

Security Role ☐ Yes

Member Attributes

Member Attributes apply to members in this group. Each member will have their own value for these attributes

Inherited Attribute(s)

Hours Serving	Number of hours the individual is serving.	(Inherited from Serving Team)
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Attribute	Description	Required
No Member Attributes Found		

Save Cancel

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General

- **Group Type:** Changing the group type of an existing group is possible, but it does have some consequences. All group attribute data for the group will be lost if the group type is changed.
- **Parent Group:** This will move the group to a new parent in the hierarchy. Removing a parent group will move the group to the root or top of the tree.
- **Campus:** Providing an optional campus will link the group to a specific campus.
- **Security Role:** This option will enable the group to operate as a security role. The members of the group will be granted access to whatever privileges the group is granted.

Locations

The location area allows you to add locations based on the configuration provided through the group type.

Group Attributes

Any group attributes added by the group type will be available here for editing.

Member Attributes

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

Group Types

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

Tip:

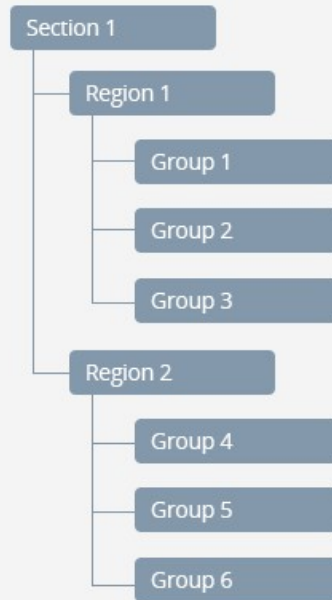
Once you realize the power of group types, you'll be tempted to start creating many custom types to fit each of your ministries. Don't do it! Resist this temptation at first. Less is more. Look for common points within your many ministries. This will help you reduce the number of group types that you'll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

Group Hierarchy

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

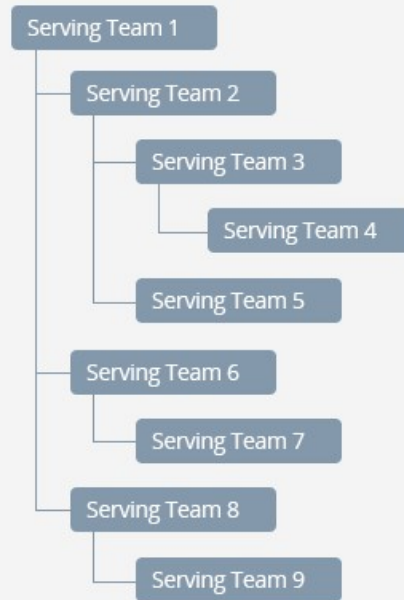
- **Structured Hierarchy:** In this configuration, the levels of hierarchy are defined and limited. For example, you may want to define the hierarchy of your small group ministry to have a single leadership team, under them a level of lay leaders who act as coaches to the groups, and then the groups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

Structured Group Heirarchy



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

Flexible Group Heirarchy




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

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

Administering Group Types

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

Group Type Editor


Name ▾
Hello Alisha ▾

Intranet ▾
People ▾
Finance ▾
Tools ▾
Admin Tools ▾

Group Type Detail

[Home](#) / [General Settings](#) / [Group Types](#) / [Small Group](#)

Small Group

Note

Because this group type is used by Rock, editing is restricted.

Name

Small Group

Description

A group of people who share an interest and meet together with regular frequency.

General ▾

Roles ▾

Member Attributes ▾

Group Attributes ▾

Group Type Attributes ▾

Display Options ▾

Save Cancel

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Common Group Type Settings

Setting	Description	Example
Group Term	This is what Rock will use to describe the group on the various screens.	Group, Family, Event, Team
Group Member Term	This is what Rock will use to describe the people in the groups on the various screens.	Member, Individual, Participant
Roles	Roles describe the relationship of the individual to the group. Are they a leader? Or just a member?	Leader, Member, Prospect
Default Group Role	The default role to use when someone is added to the group.	Selection of one of the roles defined to the group.
Child Group Types	As we discussed above, child group types help determine the hierarchy of the group tree. This tells Rock what kind of groups can be added as children of the current group.	Serving Teams may allow Child Serving Teams

Setting	Description	Example
Location Types	The types of locations that can be assigned to the group.	Meeting Location
Location Selection Mode	Determines how locations should be selected in Location Picker.	Named Location, Address, Point on a Map
Multiple Locations	Determines if the group can have multiple locations.	True/False
Group Attributes	The custom attributes that each group will have.	Meeting Day, Meeting Time, Topic of Study
Group Member Attributes	The custom attributes that each group member will have.	Hours Per Week Serving, Assigned Bus
Takes Attendance	Determines if the group takes attendance. This will help to enable check-in and metrics features.	True/False
Attendance Rule	Determines how check-in will work if the person is not already in the group.	Add on Check-in (adds the person to the group if they are not already in the group), Already Belongs (the individual must already belong to the group)

Advanced Group Type Settings

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

Setting	Description	Example
Purpose	The purpose helps categorize different group types together. This allows you the flexibility of creating multiple group types but at the same time providing a way of 'linking' these various types together with a single 'purpose'. To add a new purpose simply add a new <i>Defined Value</i> under <code>Admin Tools > General Settings Defined Values > Group Type Purpose</code> .	While we recommend that you start with a single group type to manage your various serving teams you could over time add new ones. You would then create a purpose to describe them all as serving opportunities.
Group Type Attributes	Custom attributes that will be shared by every group of this type. In other words every group of this type will have the same value of these attributes.	Most group types won't have a need for these. They are used by the checkin system.

Setting	Description	Example
Attendance Prints To	<p>Determines the device / location where check-in labels will be printed. The options are:</p> <ul style="list-style-type: none"> • Default - Uses the print location configured in the check-in workflow. • Kiosk - Overrides the check-in workflow to always print at the check-in kiosk. • Location - Overrides the check-in workflow to always print at the location configured in the group. 	This setting will have limited value outside of configuring check-ins.
Inherited Group Type	This allows you to create a group that inherits its attributes from another group type. This is helpful when you have two group types that are very similar but one needs a few more attributes.	Say you have a <i>Serving Team</i> group type that covers most of your serving groups. Your worship teams, however, would like to add a special attribute for <i>Instruments Played</i> . You want this new group type to have all of the same attributes of the current <i>Serving Team</i> . To solve this, add the <i>Serving Team</i> group type as the <i>Inherited Group Type</i> of the new <i>Worship Serving Team</i> group type.

Securing Groups

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

Securing Group Types

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

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

Securing A Group

They may be occasions where each group will need different security settings. Don't worry, this is super easy in Rock. To secure a specific group, find the group in the group viewer ('People > Group Viewer'). On the group details page you'll find the same 'insert icon of lock' button. Clicking this will bring up the Rock security dialog where you can adjust the security settings. Note the inherited permissions at the bottom of this screen. Inherited security is a very powerful concept with groups. By default, a group will inherit the security of its parent groups and group type. This limits the amount of security configuration each group requires. These inherited rights are only a starting point. You can either build on top of these permissions or override them. The choice, and power, is up to you.

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

Group Strategies

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

Multiple Group Viewers

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

Here Are Your Tools

The screenshot shows the ROCK Group Viewer interface. At the top is a navigation bar with the ROCK logo, a search bar, and a user profile. Below this is a toolbar with icons for Intranet, People, Finance, Tools, and Admin Tools. The main content area is titled 'Group Viewer' and shows a sidebar with a group tree (labeled 1) and a main area with group details (labeled 2) and a member list (labeled 3). The group details section shows 'Ushers' with a 'Serving Team' dropdown, 'Edit' and 'Delete' buttons, and a 'Group Members' table. The member list table has columns for First Name, Last Name, Role, Status, and Hours Serving. The table shows two members: Ted Decker and Jim Simmons, both with the role of Member and Status of Active, each serving 1 hour. The bottom of the interface shows a footer with the text 'Crafted by the Spark Development Network / License'.

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

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

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

Group Folders

As you start to think about your group hierarchies, make sure that you plan for growth. This might mean that you create special groups in your hierarchy to help to categorize your groups. You can think of this like using folders on your computer to help manage all of your files. You could throw all of your files in one folder, but you'd never find anything. Adding folders helps you arrange and sort your groups. While folders add little value to your computer's file-system, these *category groups* can actually be beneficial beyond just organizing. For instance, if you add these category groups to your serving teams, the categories can act as leadership teams for their sub-groups. Take a look at this example of the first impressions serving teams at a large multi-campus

church:

Sample Serving Heirarchy

- ▼ ⌚ Glendale Campus
 - ▼ ⌚ Usher Teams
 - ▼ ⌚ Saturday Services
 - ⌚ 4:30 pm Service
 - ⌚ 6:15 pm Service
 - ▼ ⌚ Sunday Services
 - ⌚ 9:00 am Service
 - ⌚ 11:15 am Service

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