PERSON & FAMILY FIELD MANUAL

A PRACTICAL GUIDE FOR MANAGING PEOPLE

Welcome

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

We Are Family

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

Addresses

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

- Home
- Work
- Previous

Adding An Address Type

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

1. Add a new group location type under `Admin Tools > General Settings > Defined Types > Group | Location Type.` Be sure you select the `Group | Location Type` as there is also a `Location | Location Type`.
2. Add this new group location type to the Family group type under `Admin Tools > General Settings > Group Types.` From this screen select the *Family* group type and add the new address type under the *General* section.

Campus

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

Portrait Of A Person

What Makes a Person

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

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

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

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

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

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

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

Adding a Person

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

Deleting a Person

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

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

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

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

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

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

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

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

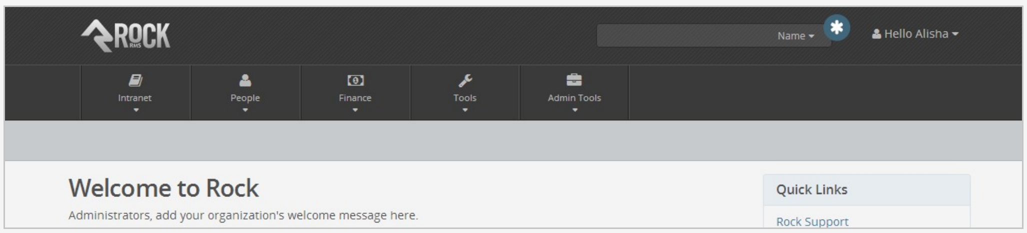
It would be best not to add test records to your production environment. You might consider creating a test environment that you can treat as a sandbox. If you did add a sample record to your database, you have two options. The first option is to inactivate it like it was a normal person. The second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

Searching

Searching By Name

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

Smart Search Tool



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

t decker
te dec
decker

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

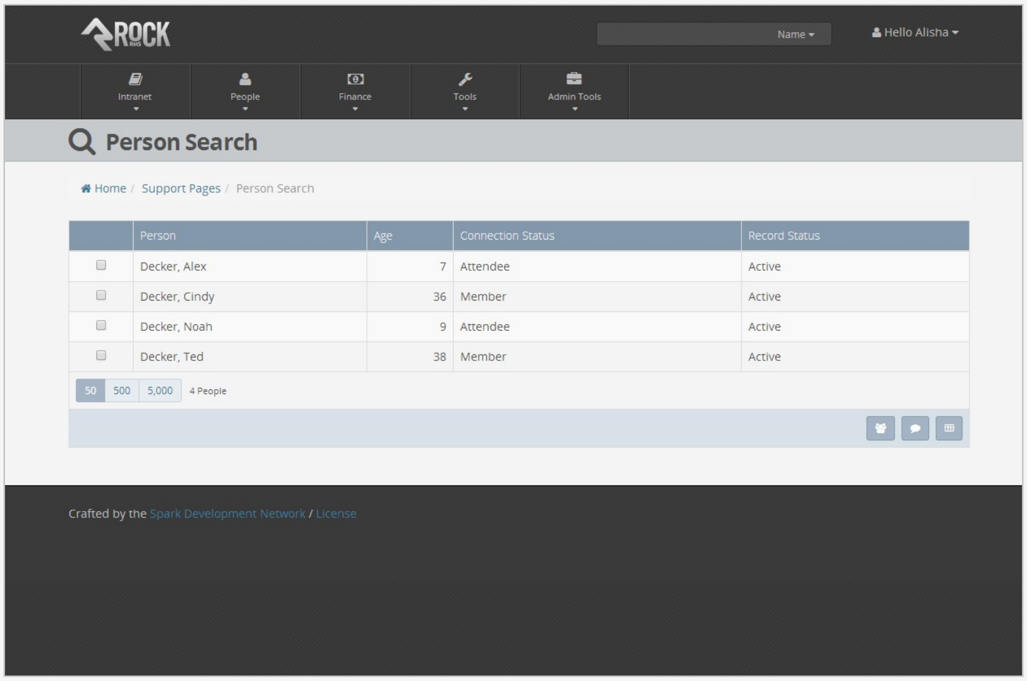
Also, notice in our samples above that we never searched for just "Ted." If you provide only one name, we're assuming that you are searching by last name.

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

If searching by only the first name works for your church, no problem, we have you covered. To enable searching both first and last names when only one term is provided go to `System Settings > Search Services > Person Name` and enable the *Allow Search by Only First Name* checkbox.

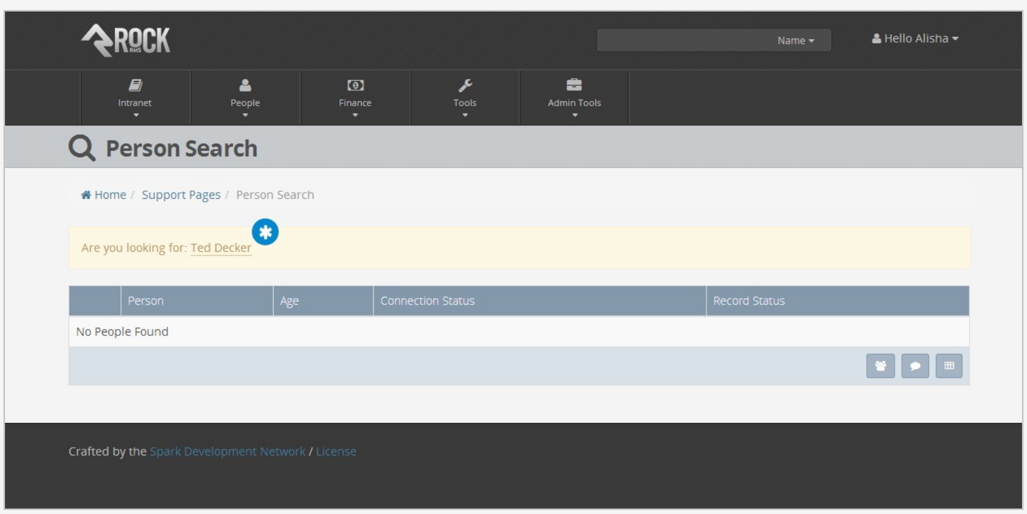
Once you submit your search, you will see one of two possible screens. If only one user matches your search, you will be taken straight to the *Person Profile* page for that specific person. However, if more than one person was returned, you will see a list of individuals. Select the correct one, and you will be taken to their *Person Profile* page.

Search Results for 'Decker'



Rock has a sophisticated algorithm for helping you find names even if you can't spel theem corectlly. You may often see other possible matches at the top of your search results.

Other Recommended Results



Other Recommended Results

Searching By Phone

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

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

(623) 555-33
62355533
3322
555 3322

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

Searching By Email

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

Searching By Address

The address search is also similar to the other search types. Keep in mind, though, that it only operates on the street address portion (first line) of the address. Sample searches for Ted Decker would be:

11624 N 31st Dr
11624
31st Dr

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

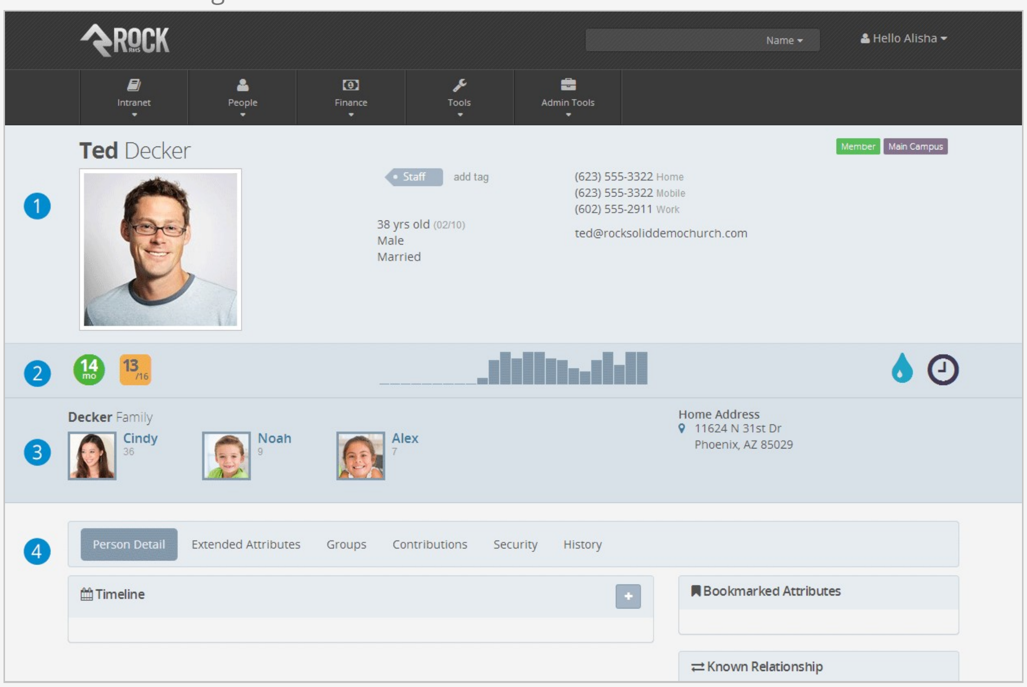
These four search options should meet your needs in almost every case. If you need to search with even finer detail you can write a quick *Data View* to find the person. See the `Taking Off With Reporting` guide to learn more.

Person Profile Page

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

The page can be broken down into four main bars.

Person Profile Page Sections



1. **Bio Bar**
2. **Badge Bar**
3. **Family Bar**
4. **Subsections Bar**

Bio Bar

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

Bio Bar

1. **Photo**
   If a photo is available, it is shown here. If no photo is available, a gender-appropriate anonymous photo is shown. In a soon to be released update, you'll be able to send an email to the user requesting a photo by clicking the blank photo.
2. **Tags**
   Tags are a handy tool for creating simple groups of people. Tags are so useful that they have their own chapter.
3. **Demographic Information**
   This includes age, gender and marital status.
4. **Contact Information**
   This section contains phone numbers and email addresses.
5. **Labels**
   Labels are a quick way of categorizing a person's involvement. After installation, the following labels will be active on the page, but you can add custom items with some light development:
   - **Connection Status:** Member, Attendee, Visitor, Participant
   - **Campus:** Which campus the member's family attends
   - **Record Status:** This label is only shown if the record is *Inactive* (e.g.they are no longer attending)
6. **Edit Link**
   The edit link appears when you mouse into the bio section. If you are on a mobile device, it is always shown.

Badge Bar

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

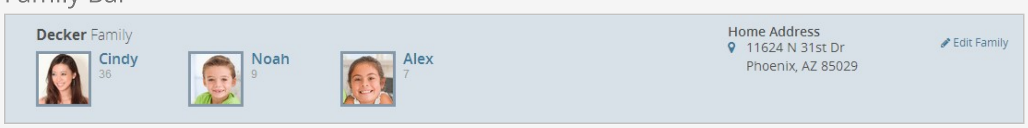
Badge Bar

1. **Attending Duration**
   The Attending Duration badge shows you how long the individual has been a part of the organization.
2. **16 Week Attendance**
   If the family is checking-in their children, this information will be displayed on the 16 Week Attendance badge.
3. **Family Attendance**
   This chart gives you a wider picture of the attendance patterns over the last 24 months. Each bar represents one month. The taller the bar, the more often the family attended that month.
4. **Baptism Badge**
   The Baptism Badge shows if the individual has been baptized
5. **Serving Badge**
   The Serving Badge shows if the person is a member of a serving team.

Family Bar

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

Family Bar



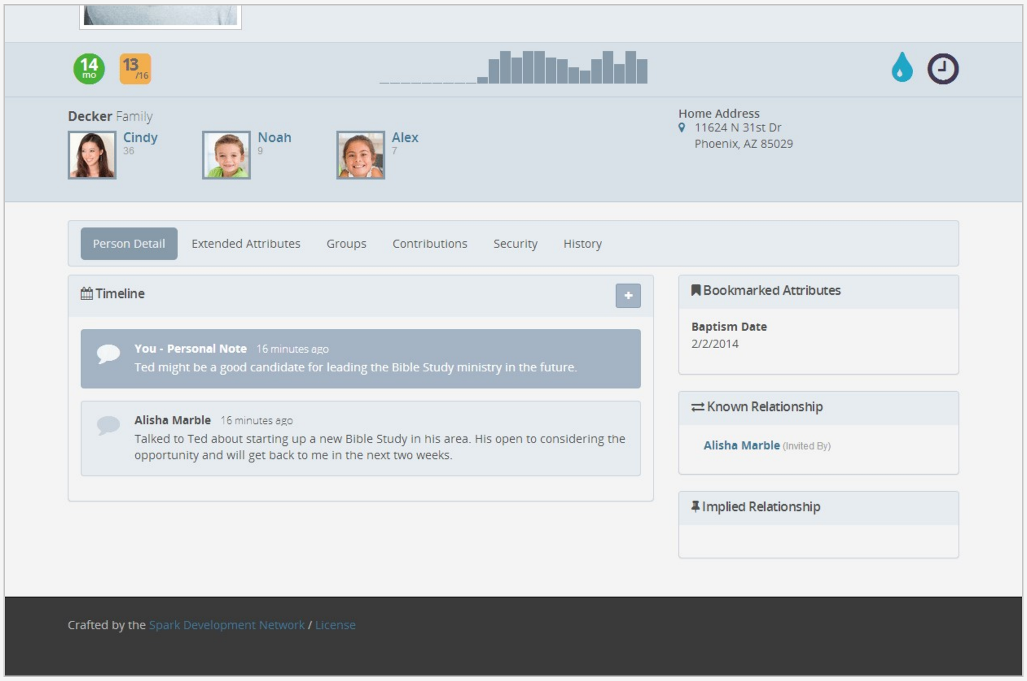
The address section of the family bar has a couple of interesting features. Clicking on the to the left of the address will bring up an interactive map. Also when you roll-over the address a will appear to the right. This icon will standardize and geocode the address when clicked.

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

Subsections Bar

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

Subsections Bar - Person Profile



Person Profile Tab

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

Timeline

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

Bookmarks

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

You can configure which attributes are displayed in this section by selecting the ⚙ in the header. You can also edit the values of the attributes by clicking the ✚.

Known Relationships

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

- Grandparent
- Parent

- Child
- Invited by
- Allow check-in by

To add a new relationship:

- Click the ✚ on the *Known Relationship* header.
- Select the relationship type you wish to add from the dropdown.
- Finally, select the person that matches the relationship you are trying to build.

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

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

Implied Relationships

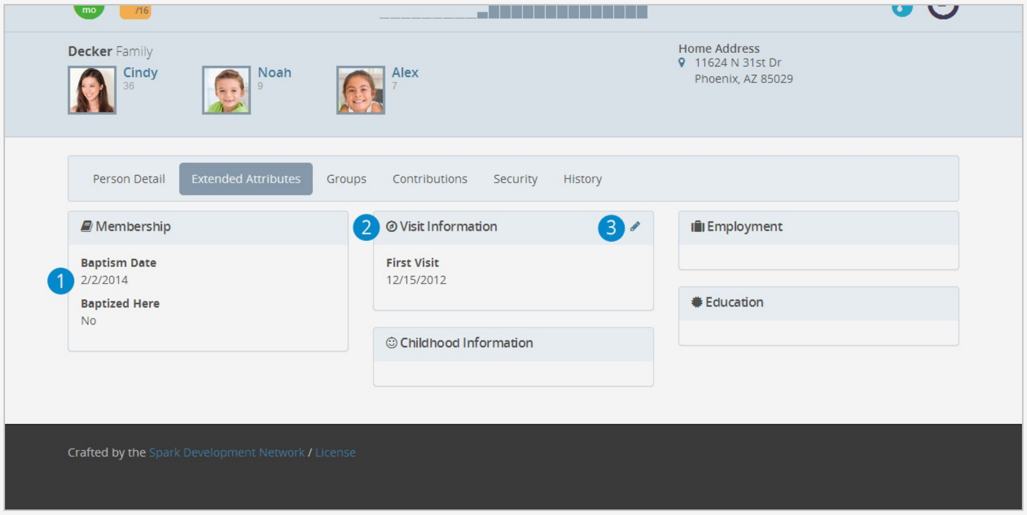
Some relationships are known, but others are implied through the data. As an example, if two people are in the same group, we can imply a relationship. Rock highlights these relationships in this section.

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

Extended Attributes Tab

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

Extended Attributes Subsection



1 **Category**
Attributes are grouped into categories to help order and manage them.

2 **Category Header**
Each category has a header with a name and optional icon.

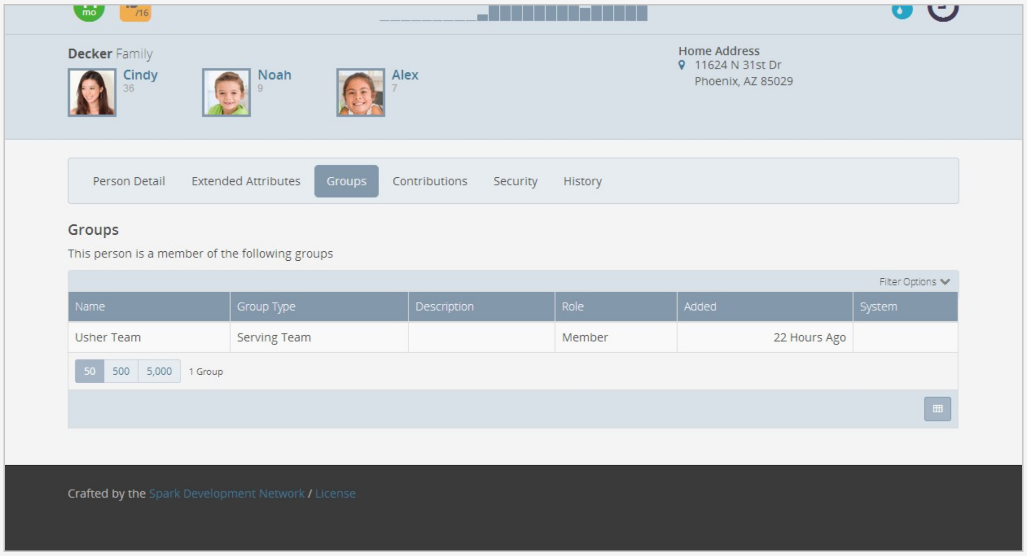
3 **Edit Button**
To edit the values of the attributes in a category simply mouse-over the category and click the edit button when it displays.

As you create new groups of person attributes, you'll want to be sure you keep this page updated. See your administrator for help.

Groups Tab

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

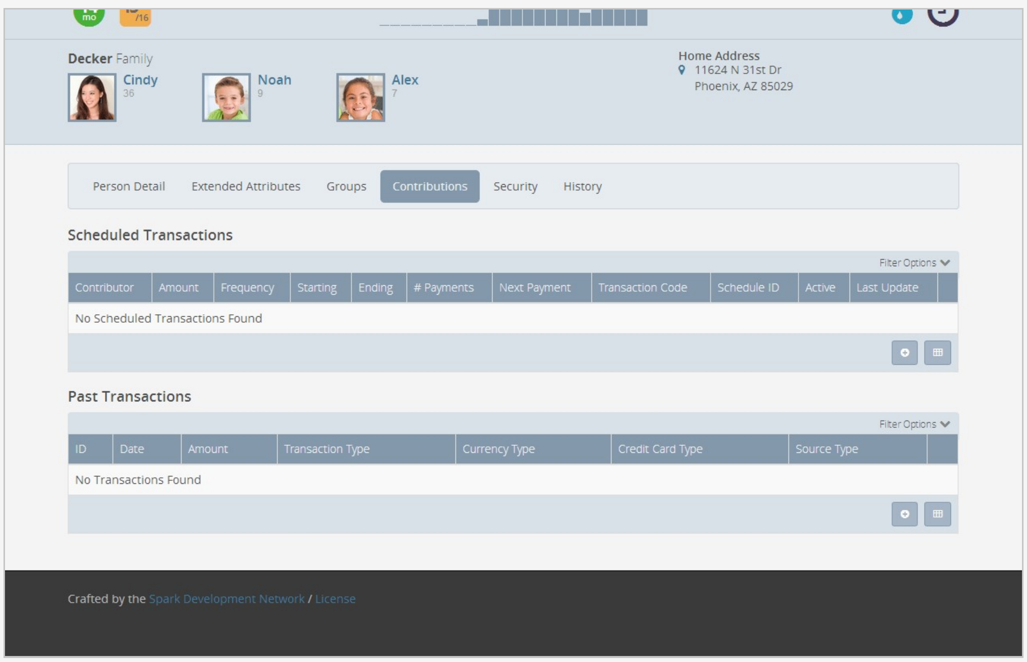
Groups Subsection



Contributions Tab

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

Contributions Subsection

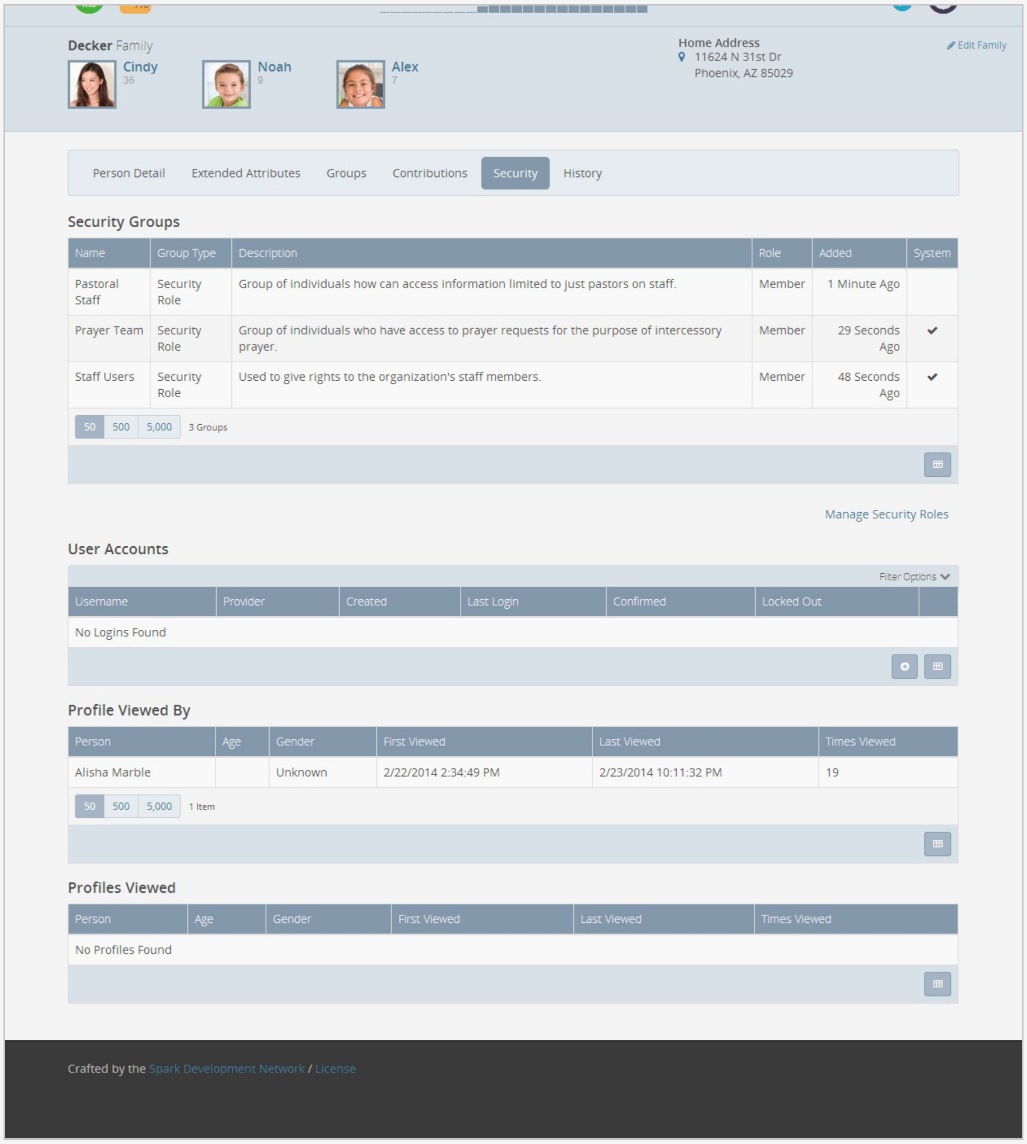


Security Tab

Rock takes security very seriously. From this tab you can see all of the security roles an individual is a member of. Next you can see each of the logins assigned to a person. Over time a person can obtain multiple if they forget one and re-register on the website.

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

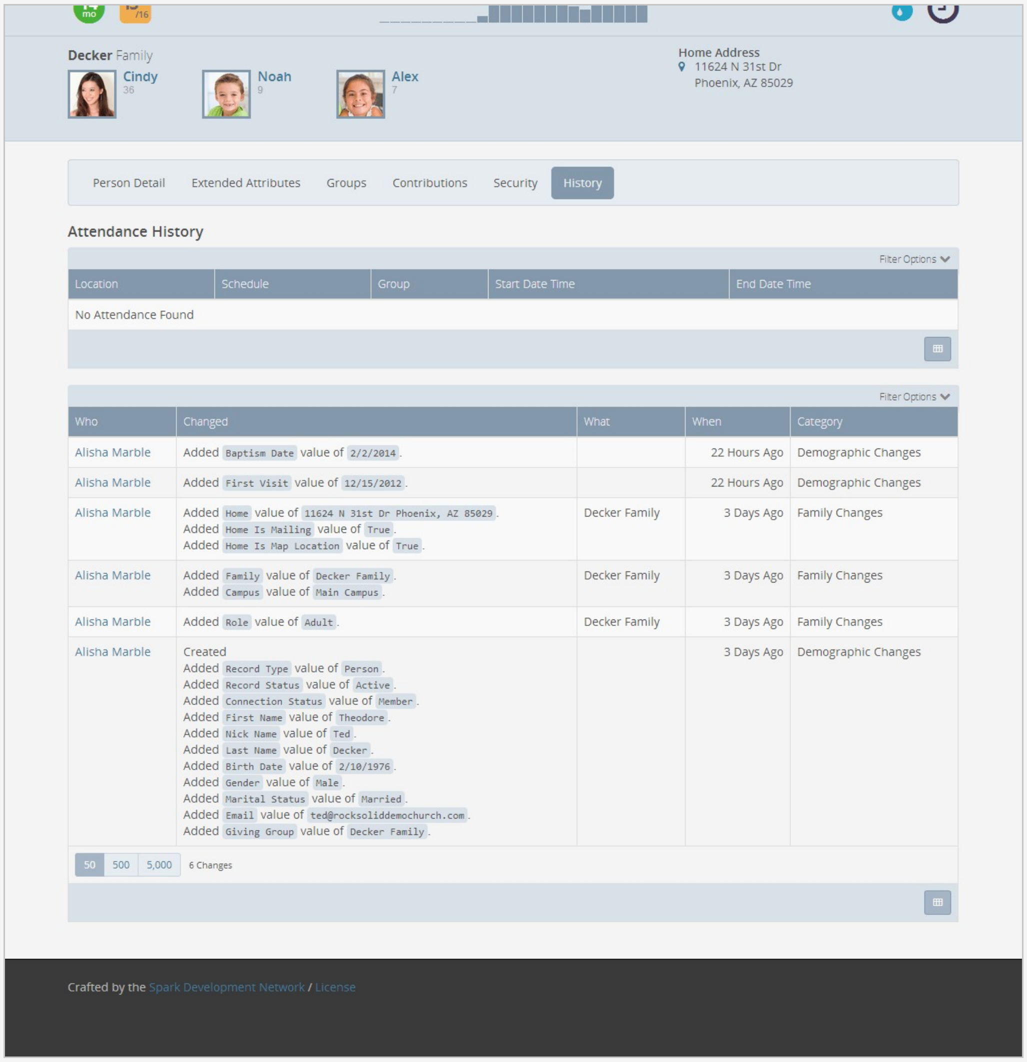
Security Subsection



History Tab

This final subsection on the *Person Profile* page shows all of the changes that have been made on the individual record. This is a helpful screen for identifying what was changed and who made the changes.

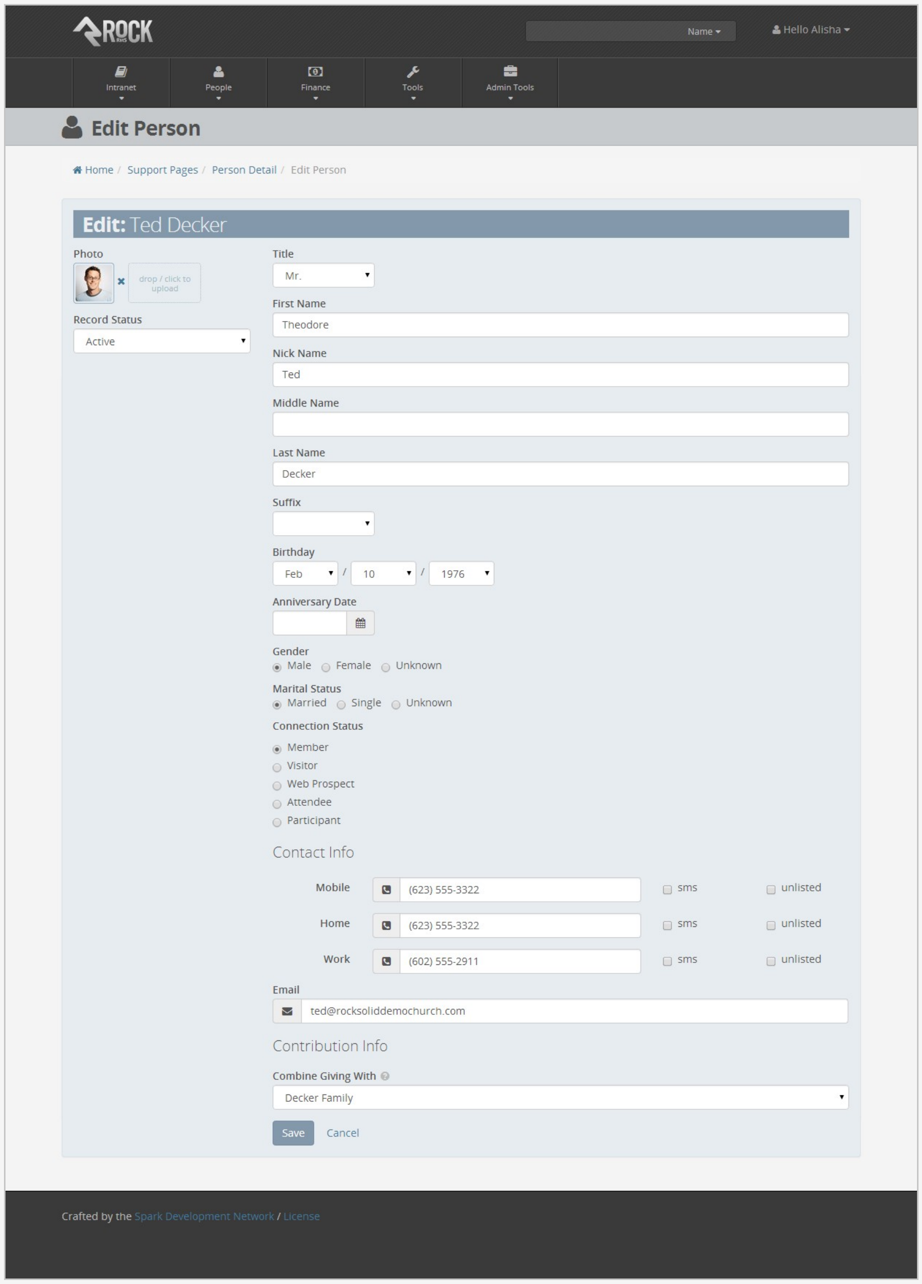
History Subsection



Editing An Individual

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

Edit An Individual



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

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

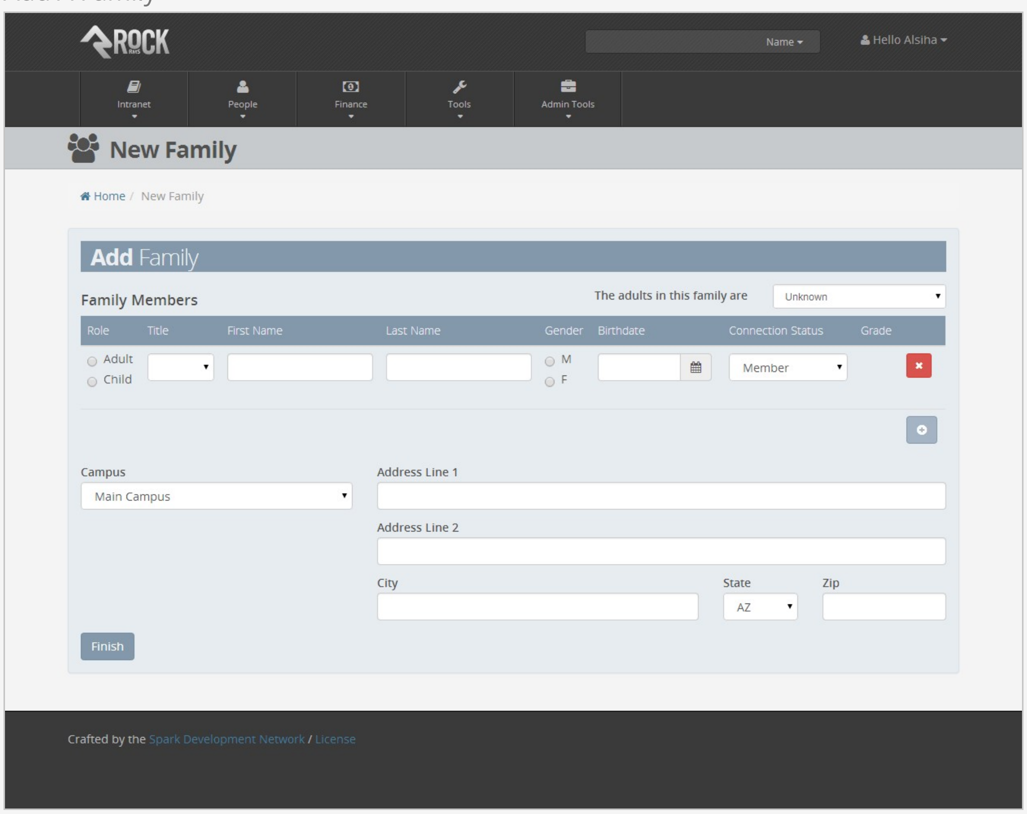
Near the bottom of the screen you will find the *Combine Giving With* field. This helps describe how the individual would like their contributions tracked. In most cases individuals would like to have the contributions tracked as a family (the default option). If someone wants contributions to be tracked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

Adding A Family

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

To add a family to the database, click `People > New Family` from the main menu, and this is what you'll see.

Add A Family



Family Members

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

- Only use these fields to add individuals to the family who are not already in the database. If you know that one or more of the individuals are already in the system, just add those who are not. Once the family is saved, you can then edit the family and add the existing members.
- Note the marital status selection at the top of the list of family members. This allows you to set the the marital relationship of the adults in the family. These options are defined as a *Defined Value* so you can rename them or add additional options. You can read more about editing *Defined Values* in the `Admin Hero Guide`.
- The grade field will only be shown when you are entering a child.
- Additional addresses (work, previous) can be added after saving the family.

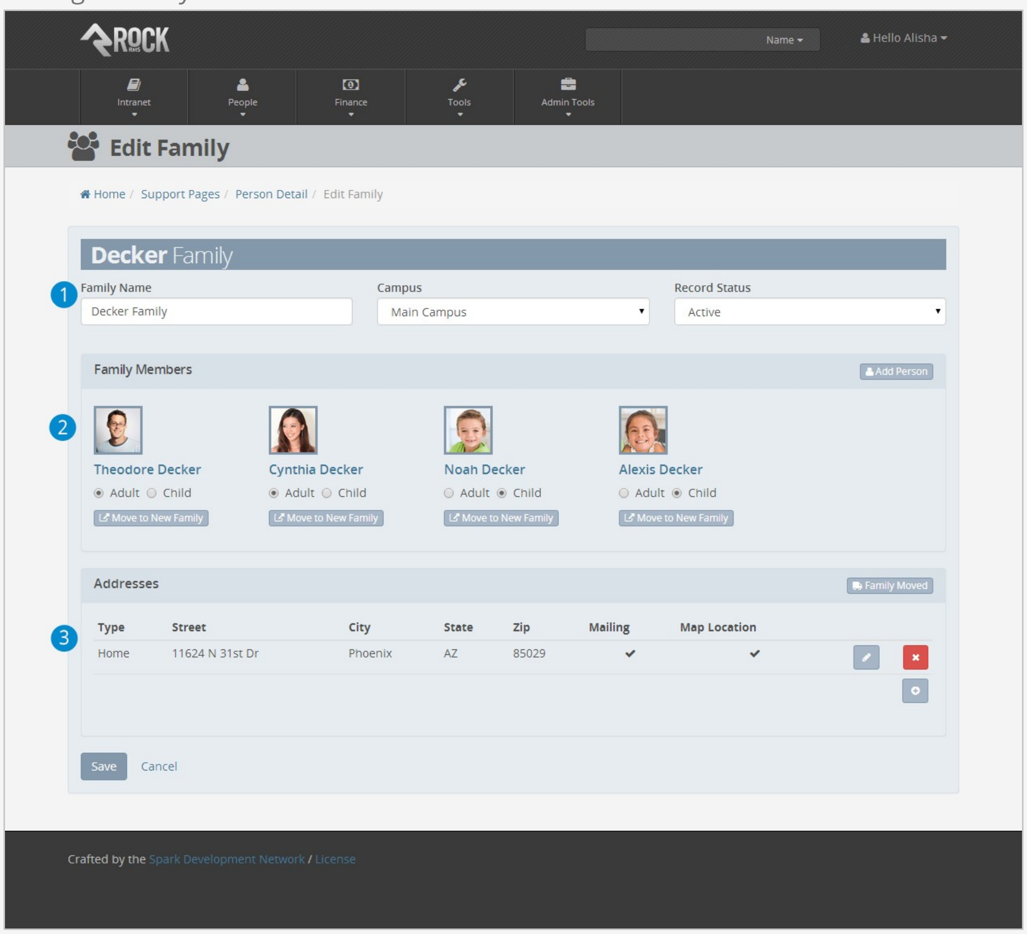
Campus and Address

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

Editing A Family

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

Editing A Family



1 **Overview Section**

2 **Family Member Section**

3 **Address Section**

Overview Section

The top section of the page allows you to edit the family name, campus and record status of the family. The family name is used as a title for the family.

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

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

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

Family Member Section

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

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

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

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

Address Section

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

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

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

Duplicates

Where Do Duplicates Come From

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

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

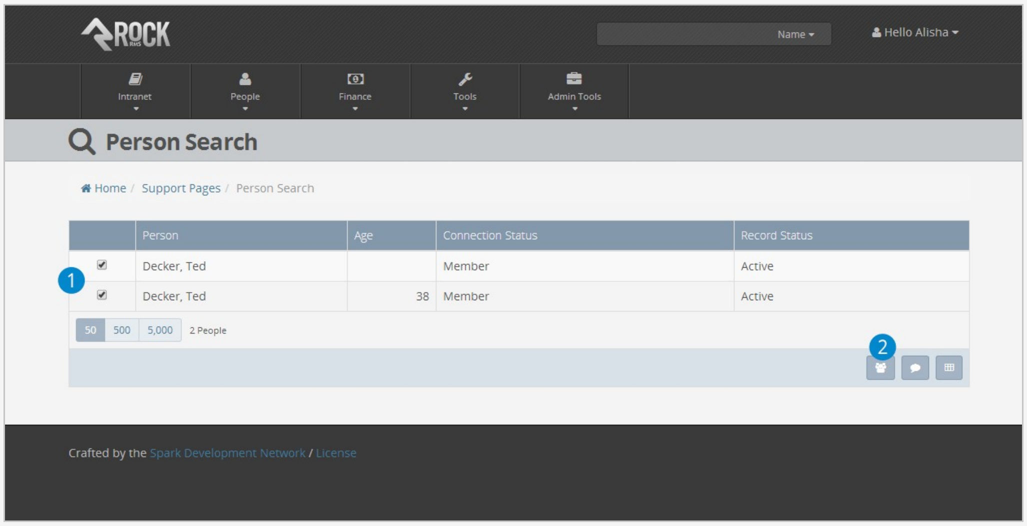
The second way duplicates are added to the system is from activity on the external website. While Rock tries to limit the number of duplicates that are created through activities like contributions and account registration, sometimes there isn't enough data to know for sure. At other times a duplicate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

Merging Records

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

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

Select Individuals To Merge

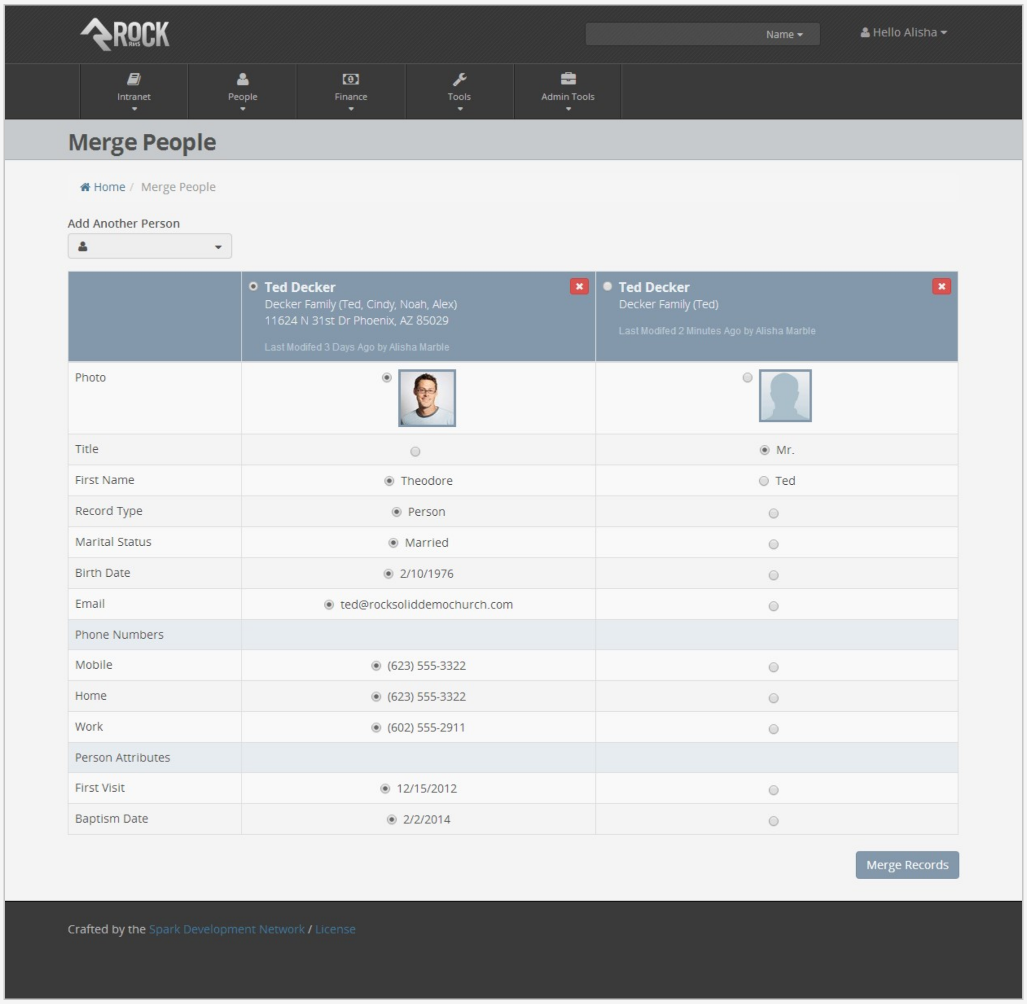


1 **Select Records**
First select the records you wish to merge.

2 **Click Merge**
Next, click the merge button at the bottom of the grid.

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

Merge Screen



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

Recommendations for Life Events

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

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

Death of a Family Member

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

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

Divorce

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

1. From the *Edit Family* screen, select the link `Move to New Family` for one of the adults.
2. Depending on custody status, you may want to ensure the children are in both families. To do this, find the new family and add any children to it, without removing them from their current family.
3. Create a *Former Spouse* relationship to both adults.
4. Update phone and address information.

Marriage

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

1. Go to the primary record (usually the husband or person with the primary address).
2. From the *Edit Family* screen click the `Add Person` and select the individual from the database, removing them from their current family.
3. Update female's title to "Mrs."
4. Update both adults' marital status to "Married."
5. Add anniversary date, if known.

Child Turns 18

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

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

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

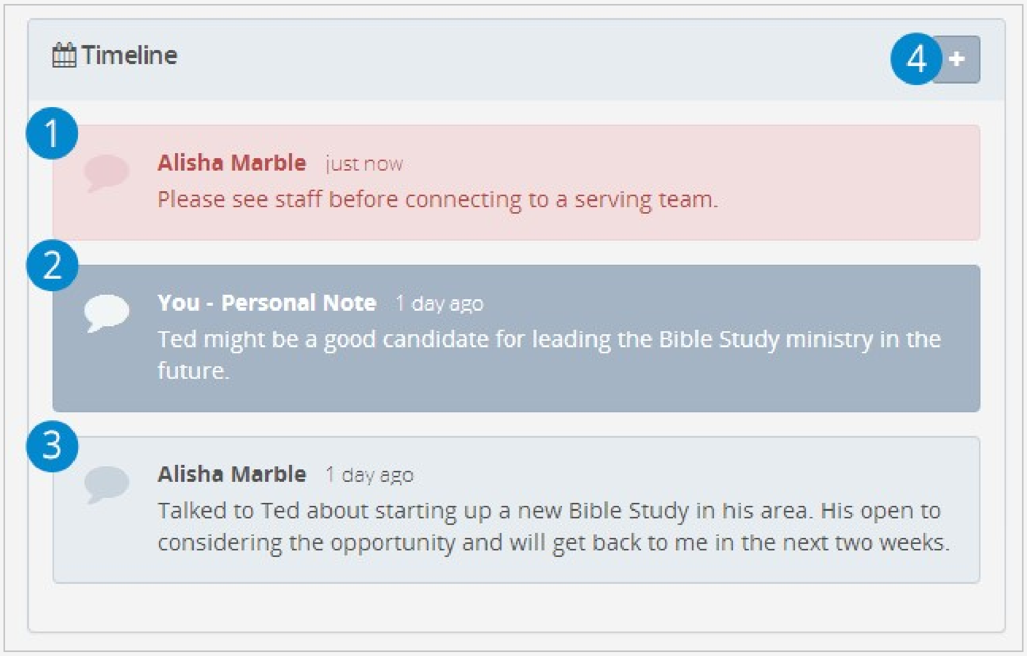
Person Notes

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

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

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

Types of Notes

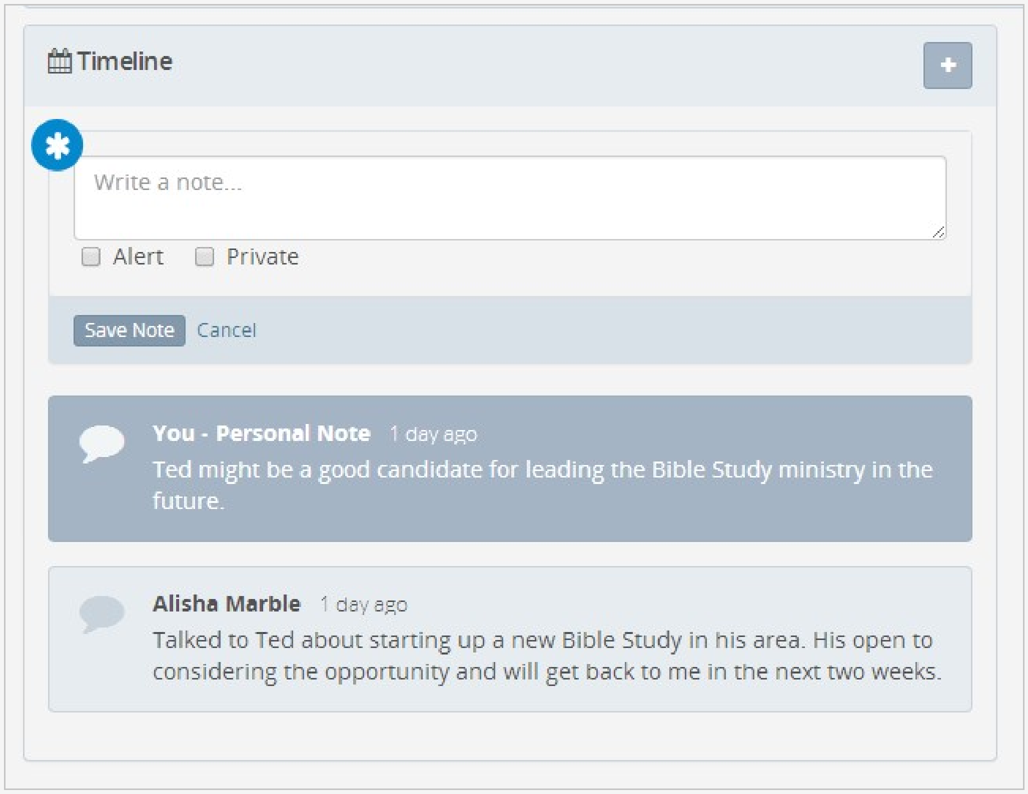


1. **Alert Note**
   Used to warn viewers of important topics. These note types will always remain at the top of the list.
2. **Personal Notes**
   These notes are viewable only by the person that entered them.
3. **Normal Note**
   These are the default note type. They are viewable by anyone who has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

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

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

Adding A Note



✱ **Editor Window**

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

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

Badges

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

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

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

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

Pre-configured Badges

Attending Duration

Attending Duration Badge

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

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

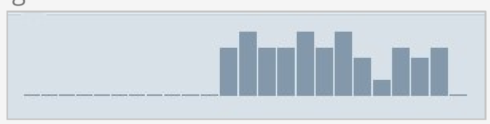
16 Week Attendance

16 Week Attendance Badge

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

Family Attendance

Family Attendance Badge



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

Baptism Badge

Baptism Duration Badge

Showing enabled and diabled state.

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

Serving Badge

Serving Badge

Showing enabled and diabled state.

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

Labels

Badge Labels

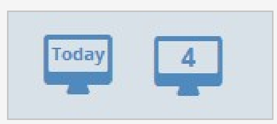
Showing all label types on the person profile page.

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

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

Last On Site

16 Week Attendance Badge



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

Adding A New Badge

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

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

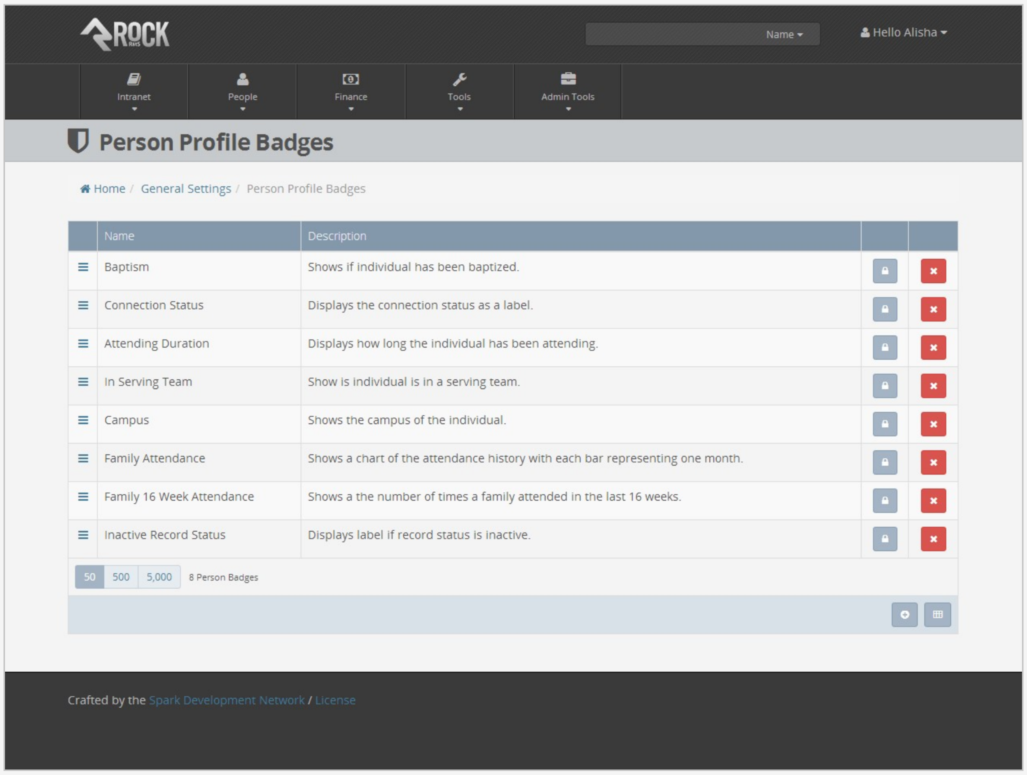
1. Define the badge you wish to add.
2. Add the badge to one of the badge containers on the *Person Profile* page.

Let's walk through each step.

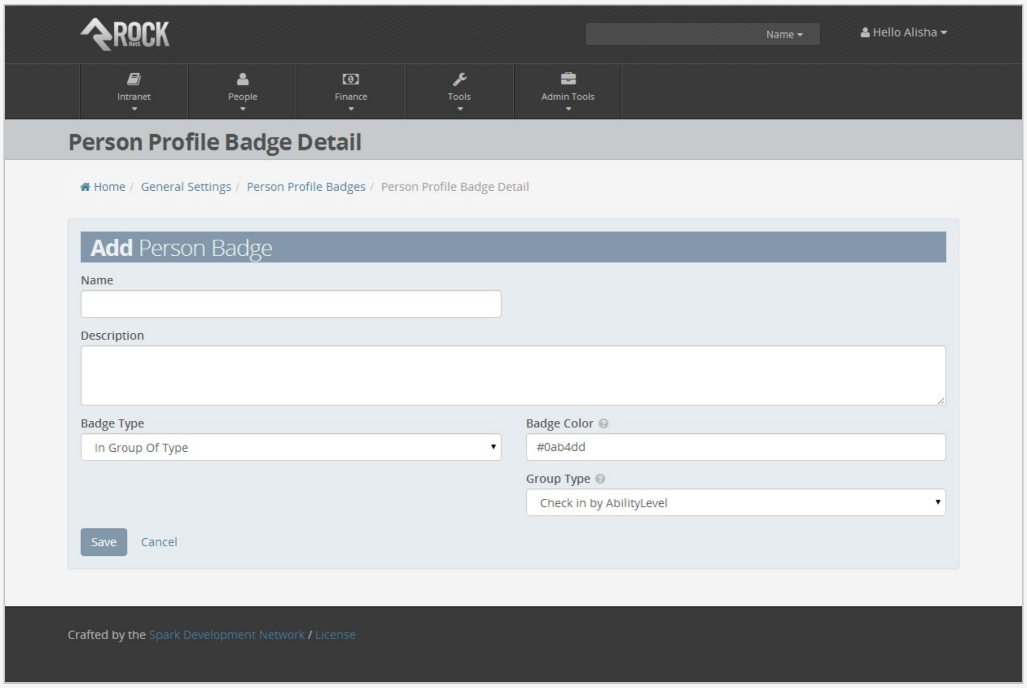
Defining a New Badge

You define new badges under `Admin Tools > General Settings > Person Profile Badges`. Here you will see a list of currently configured badges. You can also choose to create a new badge from this screen.

Badge List Screen



Add Badge Screen



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

Campus Badge

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

Attending Duration

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

Family Weeks Attended In Duration

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

Family Attendance

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

In Group Of Type

Unlike the others, this badge type was made to be used often. This is the type of badge that powers the *Serving Badge*. Here's how it works. You provide a *Group Type* and it will show the badge enabled if they are a member of a group of that type or disabled if they aren't. The icon that is used for the badge comes from the *Group Types* "Icon CSS Class." There is an additional setting on the badge that allows you to set the color of the icon.

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

Liquid Badge

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

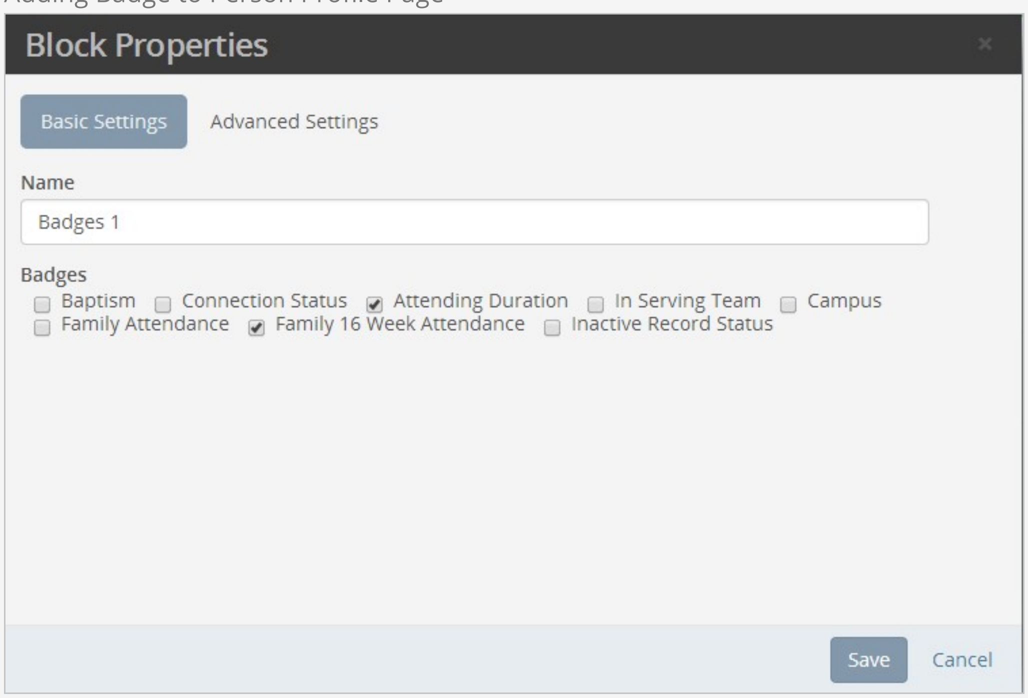
Many of the label badges and the *Baptism Badge* use this badge type. Feel free to look at their templates to see how they work. You can develop some very powerful badges using this badge type.

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

Adding Badges To The Person Profile Page

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

Adding Badge to Person Profile Page



Warning:

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

Tags

If you're familiar with tags in photo-sharing sites like Flickr or notes applications like Evernote, then you already understand how to use them in Rock. Tags offer a way to categorize people. Maybe you want to label them as a future volunteer for recruiting or maybe you'd like to tag active military personnel. While you could create a group, if your group is used only as a label for a person, you might consider a tag instead.

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

Your Tags vs. Our Tags

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

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

Viewing Tags

To view all of the individuals in a specific tag, select `People > Tags` from the menu. You will then be taken to a screen that lists all of your tags with the option at the top to switch to see public tags. Clicking on a specific tag will display all of the individuals in the selected tag. From this detail screen you can also manage the individuals within a specific tag.

Administrating Tags

Tags can be managed by an administrator under `General Settings > Tags`. The two most common reasons to administrate tags is to delete tags that no longer serve a purpose and promote personal tags to organizational tags.

Configuring A Person

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

> Note:
> Each of these settings is a *Defined Type*. You can add new values for each of these items by editing their *Defined Values*. See the `Admin Hero Guide` for more on working with *Defined Types* and *Defined Values*.

Connection Status

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

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

It is up to your organization to determine the right connection statuses for your ministry. These statuses can be modified by an administrator under `Admin Tools > General Settings > Defined Types > Connection Status`.

Record Types

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

Record Status

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

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

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

Inactive Reasons

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

- No Longer Attending
- No Activity
- Moved
- Deceased

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

Marital Status

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

- Single
- Married
- Unknown

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

Phone Types

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

- Home
- Mobile

- Work

Titles

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

Suffixes

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

Person Attributes

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

When To Use Person Attributes

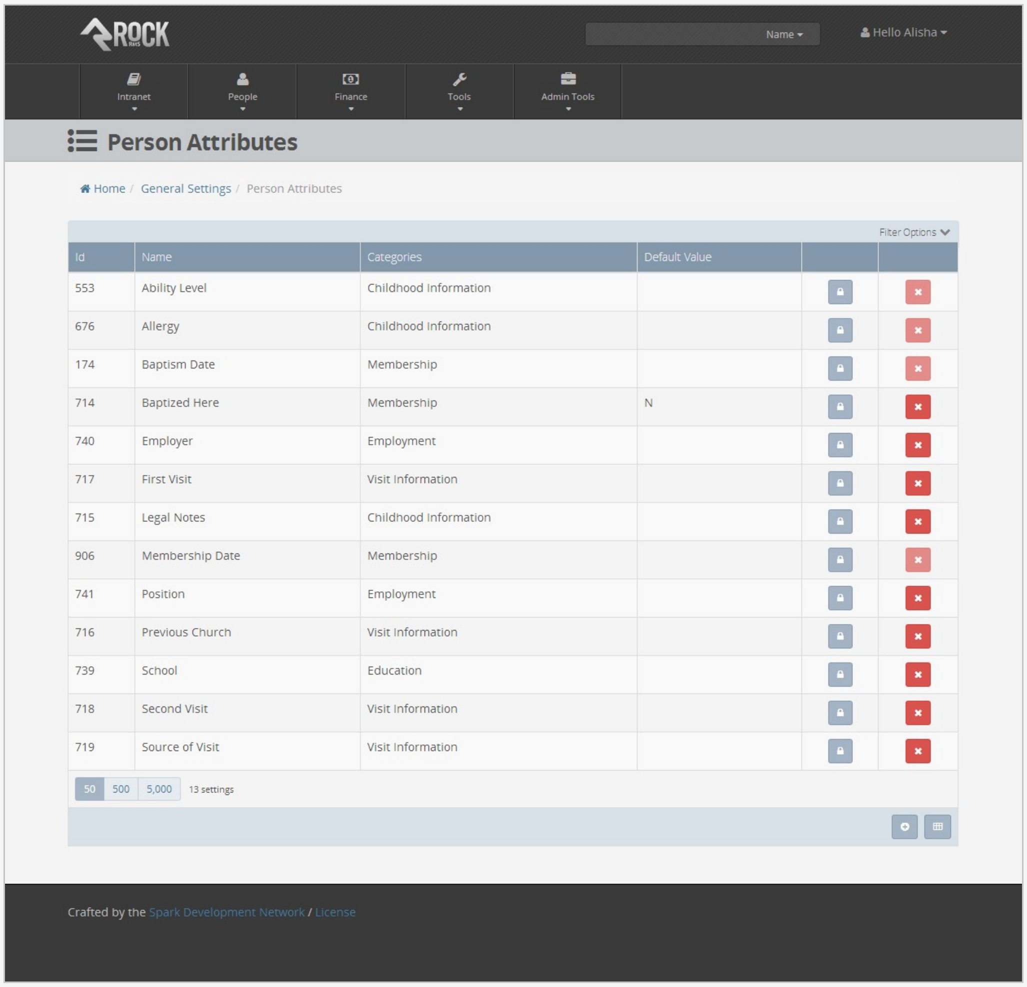
Person attributes should be used anytime you want to store the characteristics of an individual. There are a couple of situations when a person attribute may not be the best fit though. Ask yourself these questions before you add a new attribute:

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

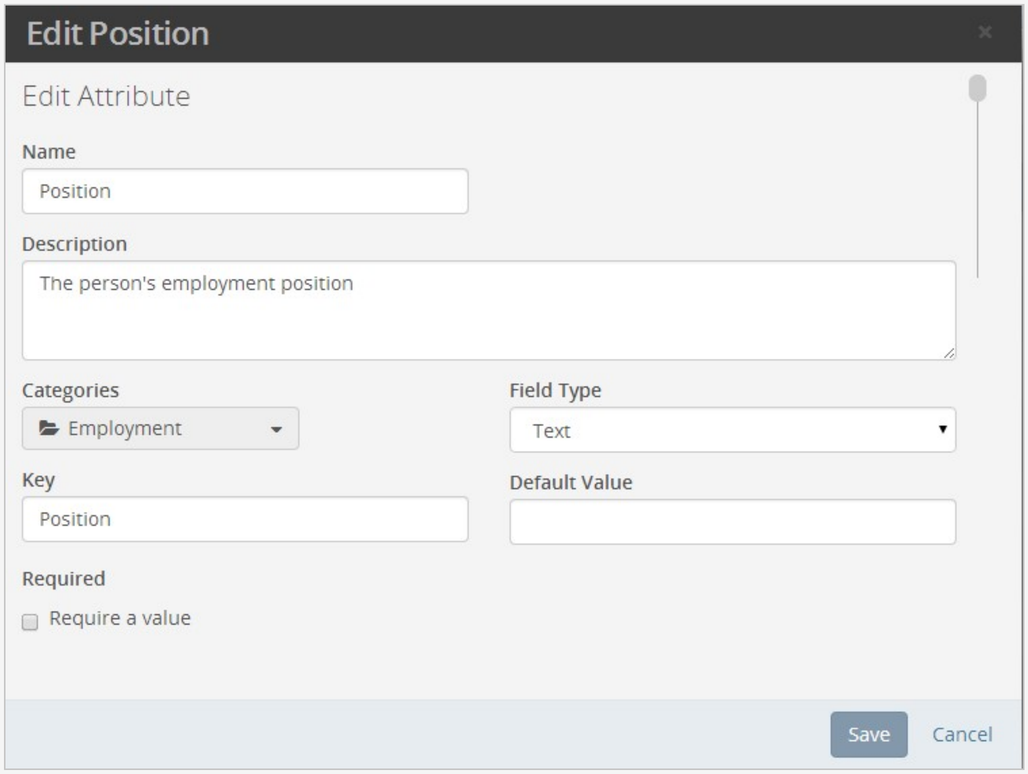
Managing Person Attributes

Person attributes are managed from `Admin Tools > General Settings > Person Attributes`. Each element of the person attribute is discussed in detail below.

Person Attribute List



Person Attribute Edit



Name

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

Description

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

You might define what it means to your organization.

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

How the data is entered.

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

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

Categories

The number of person attributes you create can get overwhelming over time. To help with this, you can categorize them into groups. This allows you to manage groups of attributes instead of individual attributes.

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

Key

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

Required

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

Field Type

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

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

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

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

Default Value

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

Securing Person Attributes

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

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

Displaying Person Attributes

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

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

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

Managing Known Relationships

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

Creating A New Relationship Type

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

To add a new relationship type, follow these steps.

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

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

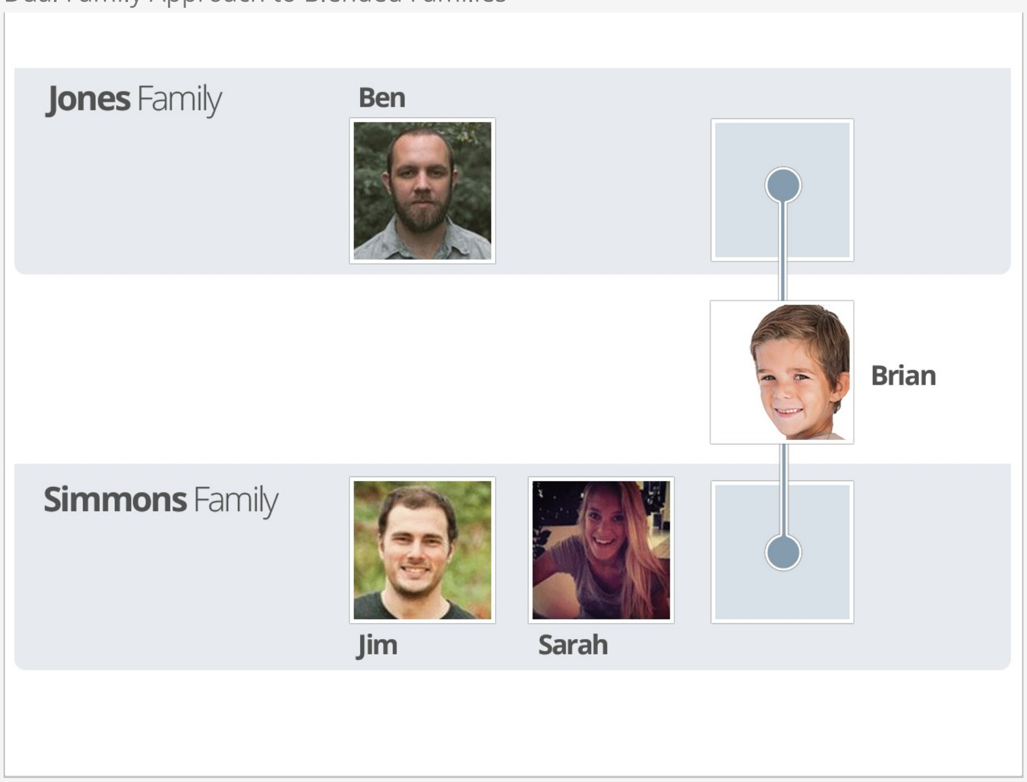
Strategies For Blended Families

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

Dual Family Approach

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

Dual Family Approach to Blended Families



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

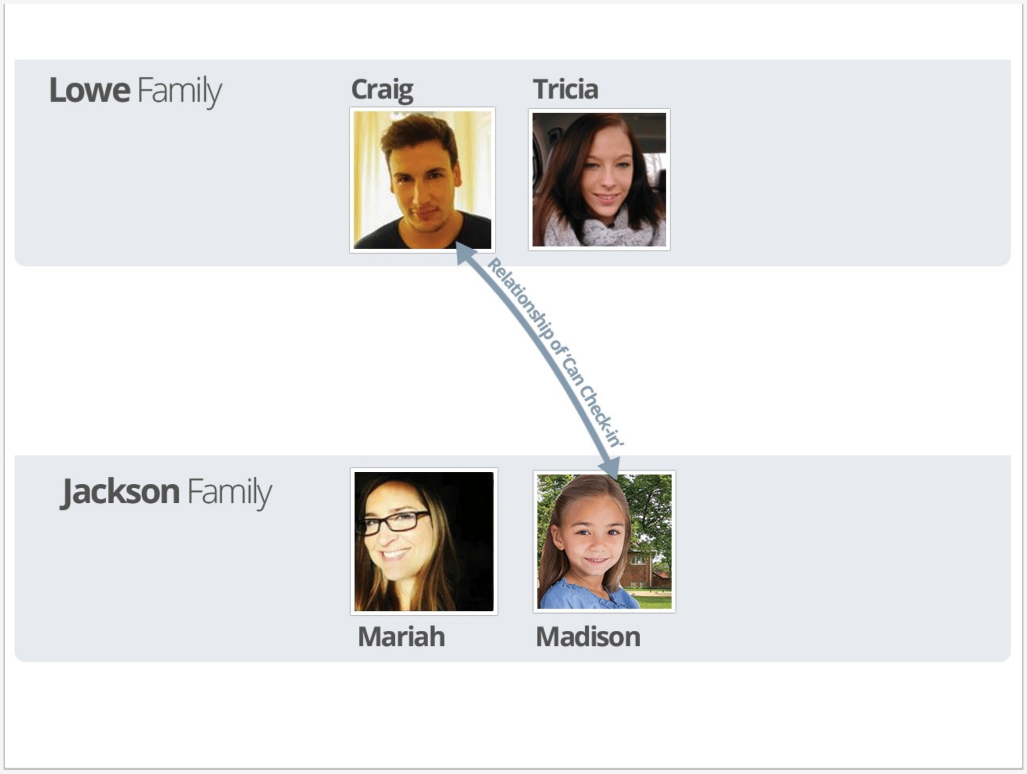
- In reporting, Brian will be listed as a single record. However, if your reports list families, this pattern will add two families to the results.

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

Single Family with Relationships Approach

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

Single Family Approach to Blended Families



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