



**C O P P E R H I L L S**  
**C H U R C H**

# **Rock Training 101**

**Introducing Rock: The church management system  
and database that feeds our church website**

**Saturday 9-Noon, March 23, 2019**

# Agenda



**Thank you for coming this morning!**

Clock	Time	Topic	By	For
9:00	15 min	<b>Introduction</b>	Trev	Everyone
9:15	60 min	<b>Events &amp; Registration</b>	Jon	Office Team
10:15	15 min	<b>Break</b>		
10:30	60 min	<b>Groups</b>	Jon	LifeGroups & Volunteer Central
11:30	30 min	<b>Questions for Jon</b>	Jon	Everyone
Noon		<b>Release</b>		

**Our Goal:** Mobilize a team of people who are trained to use a vital ministry tool at Copper Hills: Our church database.

NOTES:



# Introduction

9:00 – 9:15

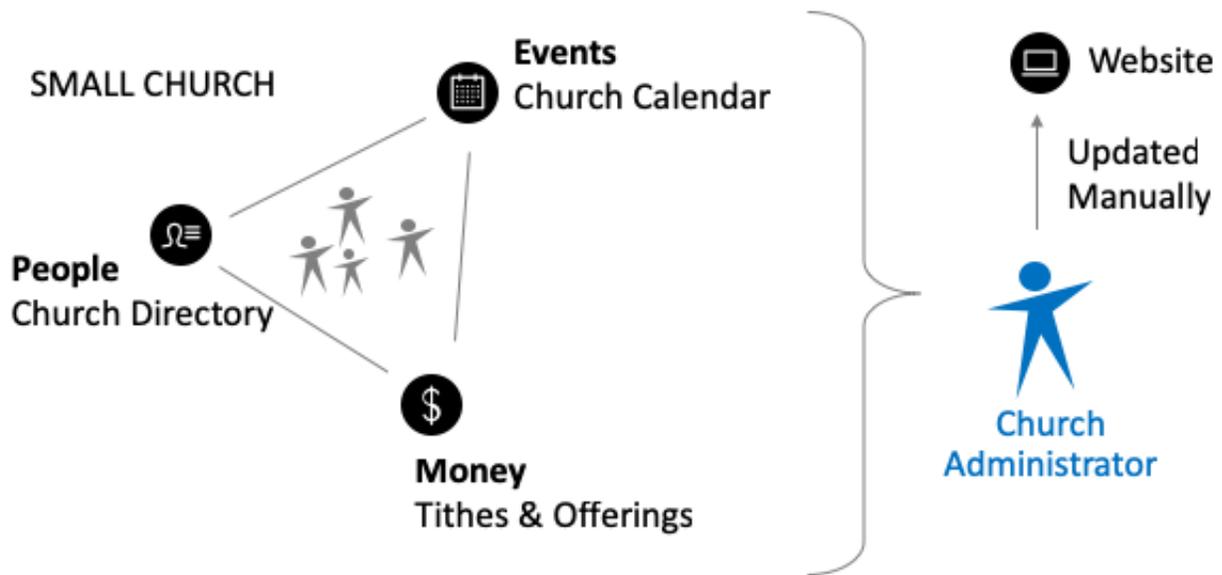
15 min

NOTES:

## Background



**From the moment they start, churches must securely store related pieces of important information. And at first that's pretty easy.**



*"I am the good shepherd; I know my sheep and my sheep know me"*  
*Jesus, John 10:14*

NOTES:

# The Problem



**But as the church grows, keeping all this interconnected information up to date and synchronized by hand becomes much more difficult.**

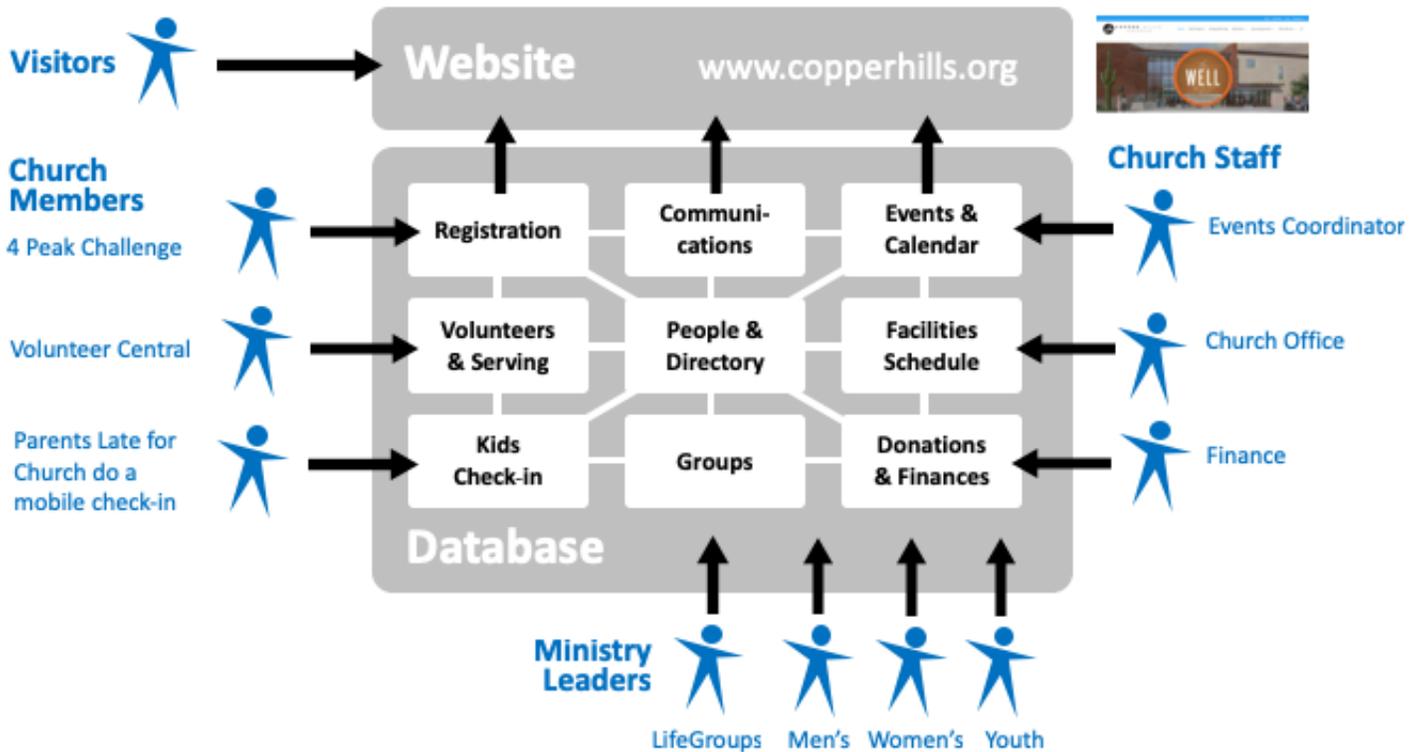


NOTES:

# Church Management Systems



**A church management system manages all this information in a big database that automatically keeps the church website up-to-date.**



NOTES:

# Rock Church Management System



**Rock is the leading church database and much more!**

**Church Directory**  
Contact information

**Involvement**  
Attendance & Badges

**Relationships**  
Family and other Relationships

**Groups**  
Small groups and serving groups

**Interactions**  
Coordinating contact and pastoral care

The screenshot displays the Rock Church Management System interface. On the left is a dark navigation sidebar with icons for home, search, profile, calendar, settings, and a briefcase. The main content area shows the profile for Ted Decker (Theodore), a member at the Main Campus. His profile includes a photo, age (39), gender (Male), and marital status (Married 16 yrs). Contact information includes home, mobile, and work phone numbers, and an email address. Below the profile is a section for the Decker Family, showing Cindy (35), Noah (11), and Alex (8). A horizontal menu at the bottom of the profile area includes tabs for Person Profile, Extended Attributes, Groups, Contributions, Benevolence, Security, and History. The Groups tab is selected, showing a timeline of interactions. Two interactions are visible: one from Alisha Marble on April 2, 2014, at 11:00 PM, and another on April 3, 2014, at 2:23 PM. On the right side of the profile area, there are sections for Bookmarked Attributes, Connection Requests, and Known Relationships.

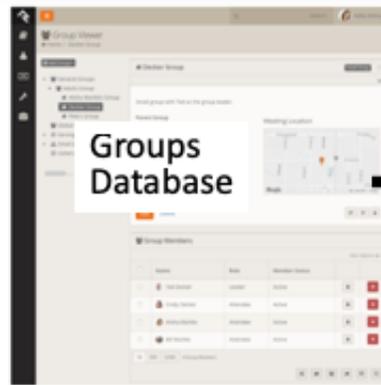
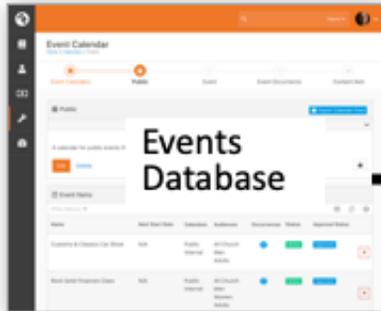
NOTES:

# Rock-driven Website

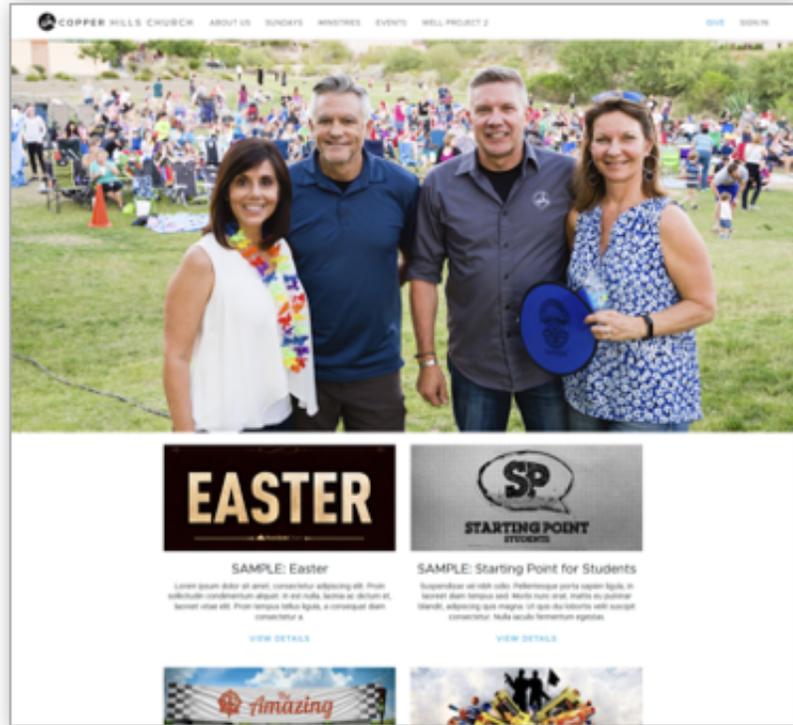


**Copper Hills new website is being developed and sits on top of Rock which automatically feeds the website with events, groups and info.**

## Rock Church Database



## New Copperhills Website



Copper Hills Church

21 March 2019

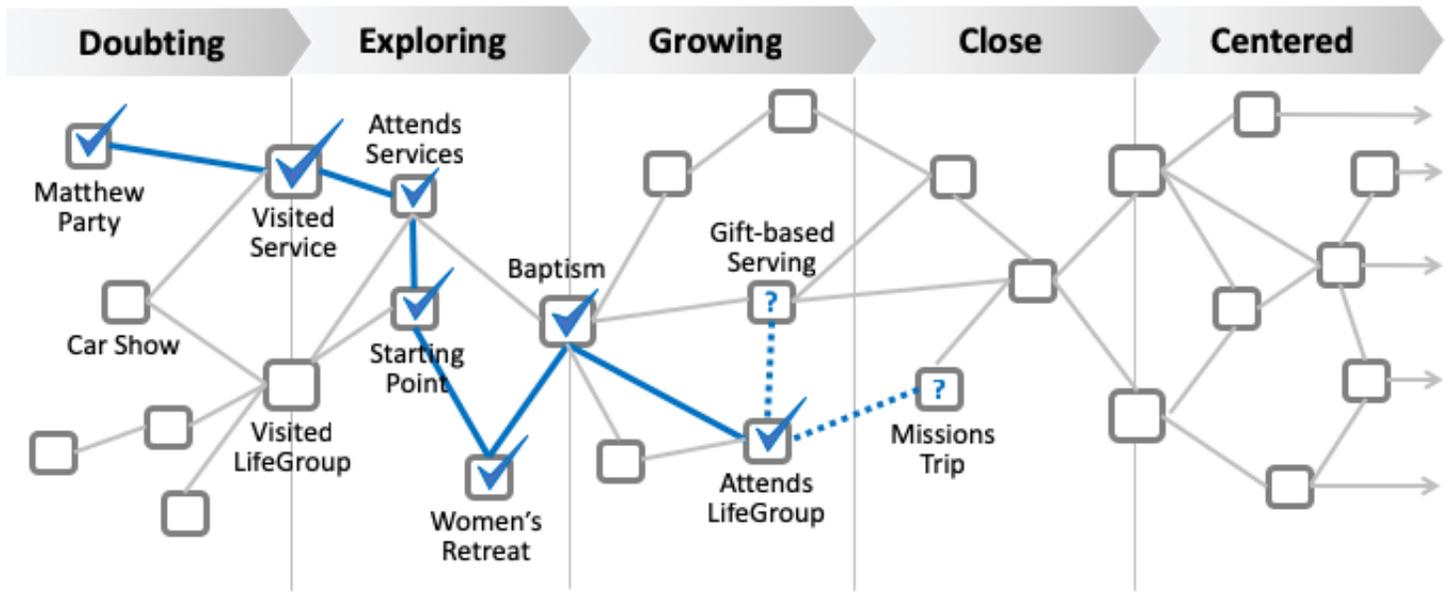
8

## NOTES:

# The Dream



**As we increasingly “know our sheep” we can increasingly invite them to the best, most relevant and formative discipleship opportunities.**



**Imagine being able to offer people a customized discipleship path based on their personality, experiences and where they are currently on their journey!**

= Opportunity

NOTES:



# Events & Registration

9:15 – 10:15

60 min

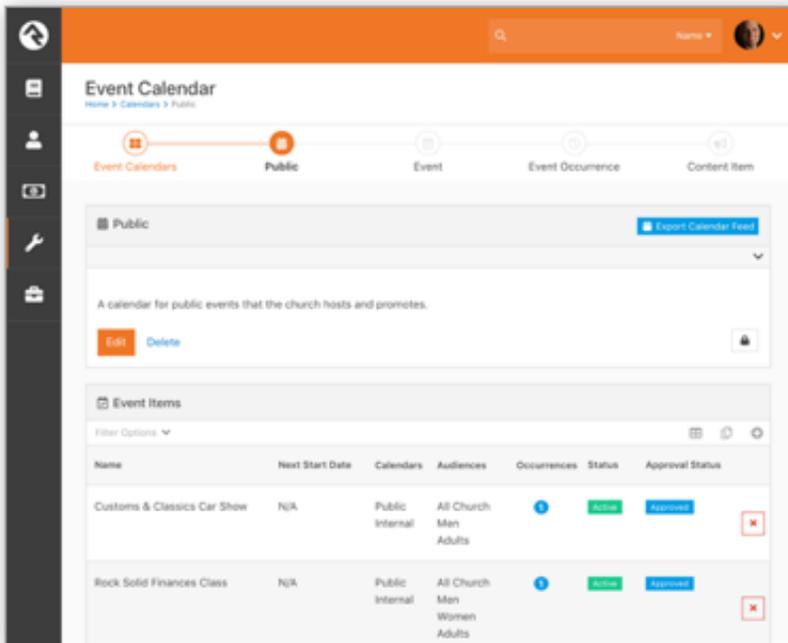
NOTES:

## Events | Debbie & Hollianne



**Rock enables us to create a database of events that automatically show on the church website at the time, to the right people.**

### Hands-on Demo/Walkthrough



### Copper Hills Use Cases

- Update a Rock Webpage Directly
- Create a New Calendar Event
  - Set Picture
  - Set Time to Show
  - Set Audience
  - Set Public/Private
- Update Ministry-specific Page
  - Youth
  - Men's
  - Women's
- Edit the Staff Landing Page

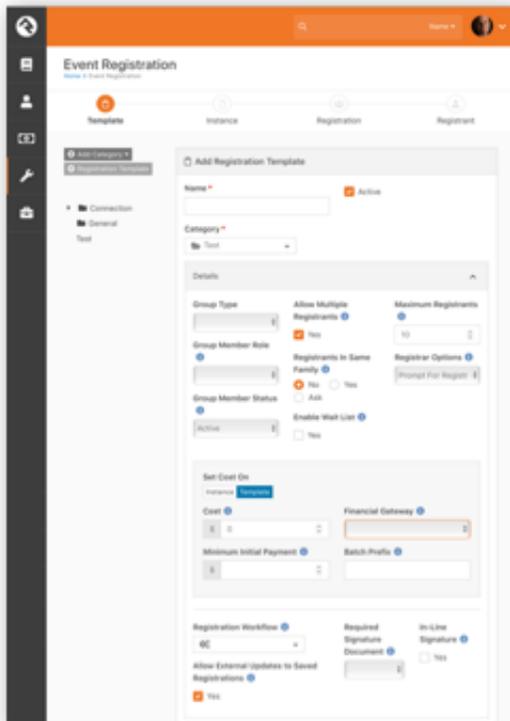
NOTES:

# Registrations | Debbie & Hollianne



**Having up-to-date information on people enables fast, accurate, online (and even mobile) registration for all kinds of events.**

## Hands-on Demo/Walkthrough



## Copper Hills Use Cases

- Set up Categories for Registrations
- Set up Templates for Registrations
- Online Registration
- Mobile Registration

### **Extra Credit: Online Payments**



*When people register and pay for events online (lessons, retreats, paid events) our payments processor costs the church both a one-time annual fee as well as taking a percent of each transaction. In 2019 we want to try to move to a less expensive payments processor (e.g. MyWell). We need help working on this if anyone is interested.*

NOTES:



# Break

10:15 – 10:30

15 min

NOTES:



# Groups

10:30 – 11:30

60 min

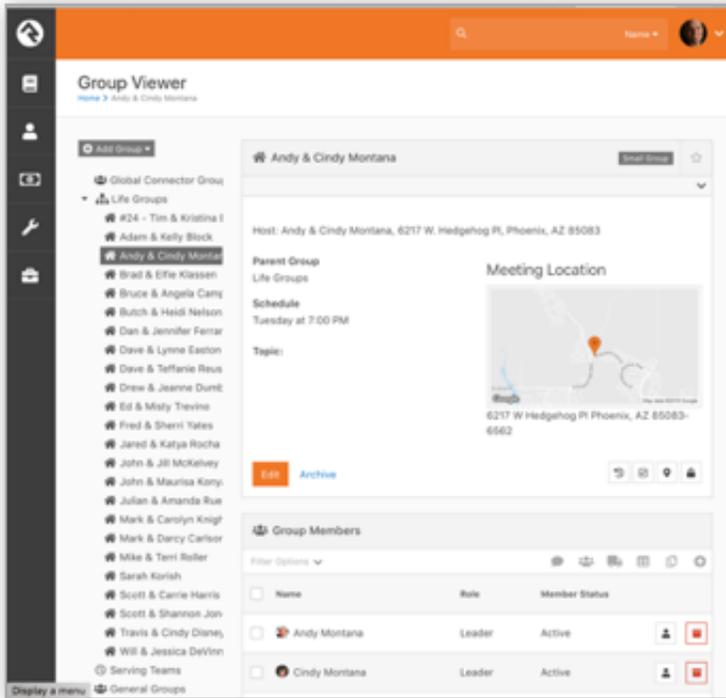
NOTES:

# LifeGroups | Nick, Tim, Trev



**Rock enables use to keep a database of all our LifeGroups, their location and demographics and show them on the church website.**

## Hands-on Demo/Walkthrough



## Copper Hills Use Cases

- Add a new LifeGroup
- Update a LifeGroup
  - New Time
  - New Location
  - New Members
- How could we create a LifeGroups dashboard?
  - # groups, # people, # co-leaders
  - % Retirees, % Young Families
  - Geographic and demographic spread?
- How could we take attendance?

## NOTES:

## Communications | Debbie, Trev



**Groups can be used for more than Small Groups ministry. Groups are also used to make administer and communicate groups of people.**

### Hands-on Demo/Walkthrough

The screenshot shows the 'New Communication' interface in the Rock Church Management system. The interface includes a navigation bar at the top with a search icon and a 'Home' link. Below the navigation bar, there is a breadcrumb trail: 'Home > New Communication > Simple Communication > New Communication'. The main form area is titled 'New Communication' and has a 'Draft' button in the top right corner. There are two tabs: 'Email' (selected) and 'SMS'. A 'Bulk Communication' checkbox is visible. The 'To:' field is currently empty, with an 'Add Person' button and a dropdown arrow. Below this, there is a 'Template' dropdown menu set to 'Default Organization Template'. The 'From Name' field is filled with 'Trevor Garrett'. The 'From Address' field is filled with 'trevor@copperhills.org'. There is an 'Attachments' section with an 'Upload' button. The 'Reply To Address' field is empty. The 'Subject' field is empty. At the bottom, there is a 'Message' field with a rich text editor toolbar. The footer of the interface shows the 'ROCK' logo and a placeholder for the user's name: '© Person.NickName |'.

### Copper Hills Use Cases

- Create a group of Baptism candidates
- Send an email to all men in the church to help set up chairs
  - By email
  - Get an email response
- Send a text to all parents of youth that tonight's location for Youth Group has been changed
  - Send by text
  - Get responses
  - Answer questions

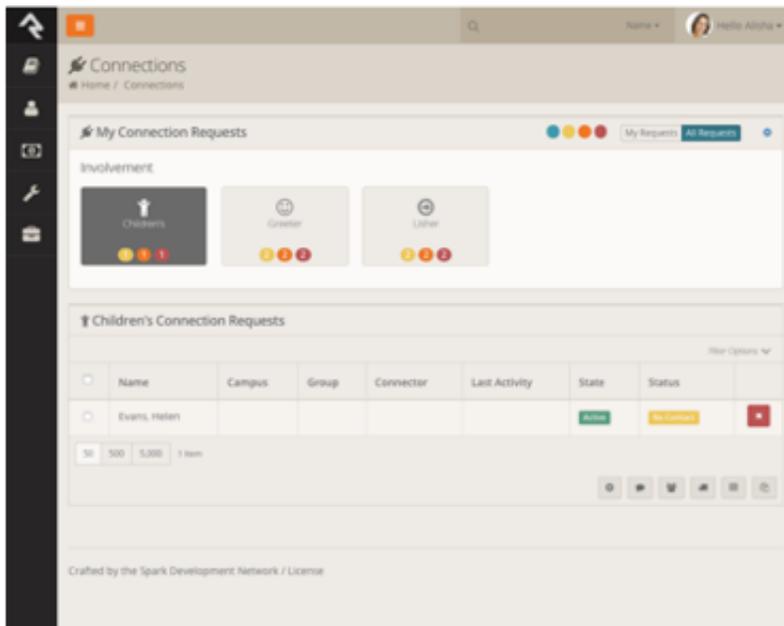
NOTES:

## Connections | Martie, Julian, Elfie



Rock has a “Connections” capability that helps us to connect with members and coordinate follow-up done by different people.

### Hands-on Demo/Walkthrough



### Copper Hills Use Cases

- Recruit a volunteer**
  - Capture info Sunday in the plaza
  - Capture gift mix, skills, passions
- Follow-up during the week**
  - By email
  - By text
  - By phone
- Recommend a potential volunteer to a specific ministry**
  - e.g. Kids Ministry
  - Queue them for a security check

NOTES:



# Question & Answer

11:30 – 12:00

30 min

NOTES:

# More Rock Resources



For more information, videos and manuals on using your specific corner of Rock, please consult the Rock website: [www.RockRMS.com](http://www.RockRMS.com)



**Rock U Videos**  
Take your knowledge of Rock to the next level with a whole library of Rock training videos.  
[Watch now...](#)



**Documentation**  
Hate reading the manual? Our guides are different! We put effort into making our guides fun to read with concise topics and a touch of humor.  
[Read on...](#)



**Workflow Actions**  
A good craftsman knows their tools. Take a look at all of the tools available in your toolbox.  
[Learn the Tools...](#)



**Lava**  
Rock is about power and flexibility. Lava adds both by allowing you to tailor the application to meet your specific needs.  
[Learn Lava...](#)



**Developer**  
Find out how to extend Rock to meet your every need. From simple blocks to whole new modules, anything is possible.  
[Dive in...](#)



**Conference Session**  
Learn from the experience of others. Our Rock Experience conference is the highlight of our year.  
[Take a look...](#)

Tons of short instructional videos at: [www.rockrms.com/rocku](http://www.rockrms.com/rocku)

- Individuals In Rock**
- Impersonation (3:51)
  - Searching for a Person (3:19)
  - Person Profile (14:31)
  - Bookmarked Attributes (2:27)
  - Adding and Editing Individuals and Families (5:14)
  - Extending the Add Family Block (5:14)
  - How to Delete a Person (1:59)
  - Blended Families (1:52)
  - Data Integrity (7:53)
  - Merging Duplicate Records (3:48)
  - Prayer Requests (5:49)
  - Tags (3:30)
  - Tag Security (1:51)
  - Person Attributes (8:16)
  - Family Attributes (2:34)
  - Known Relationships (5:30)
  - Person Note (5:01)
  - Merge Documents (7:11)
  - Following (6:14)
  - Background Checks (5:42)
  - Bulk Updates (3:33)
  - Custom Badges (4:45)

- Communication**
- Communication Overview (6:34)
  - Communication Wizard (6:58)
  - Communication Lists & Segments (6:29)
  - Communication Templates (4:14)
  - Communication Preferences (4:30)
  - Communication Analytics (4:32)
  - System Emails (2:19)
  - Sending Email (Simple Mode) (5:38)
  - Sending SMS (Simple Mode) (4:35)
  - Communication Templates [Legacy] (2:15)

- Event Registration**
- Registration Walk-through (3:56)
  - Registration Fees (1:01)
  - Partial Payments (3:04)
  - Registration Structure (2:04)
  - Registration Templates (11:44)
  - Registration Instances (3:12)
  - Group Placement in Event Registration (2:41)
  - Wait Lists (3:30)
  - Calendar Overview (3:21)
  - Calendars and Events (7:57)
  - Linkages (7:07)

- Groups**
- Group Viewer (3:11)
  - Group Attendance (2:43)
  - Group Types (18:49)
  - Group Type Inheritance (3:08)
  - Group Location (2:53)
  - Group Purposes (3:36)
  - Group Placements (3:25)
  - Alternate Placements (2:55)
  - Group Requirements (4:42)
  - Group Security (8:53)
  - Extending Groups (7:51)
  - Group Details (9:27)

- Connections**
- Overview (13:59)
  - Connection Types (9:04)
  - Connection Opportunities (8:29)

## NOTES: