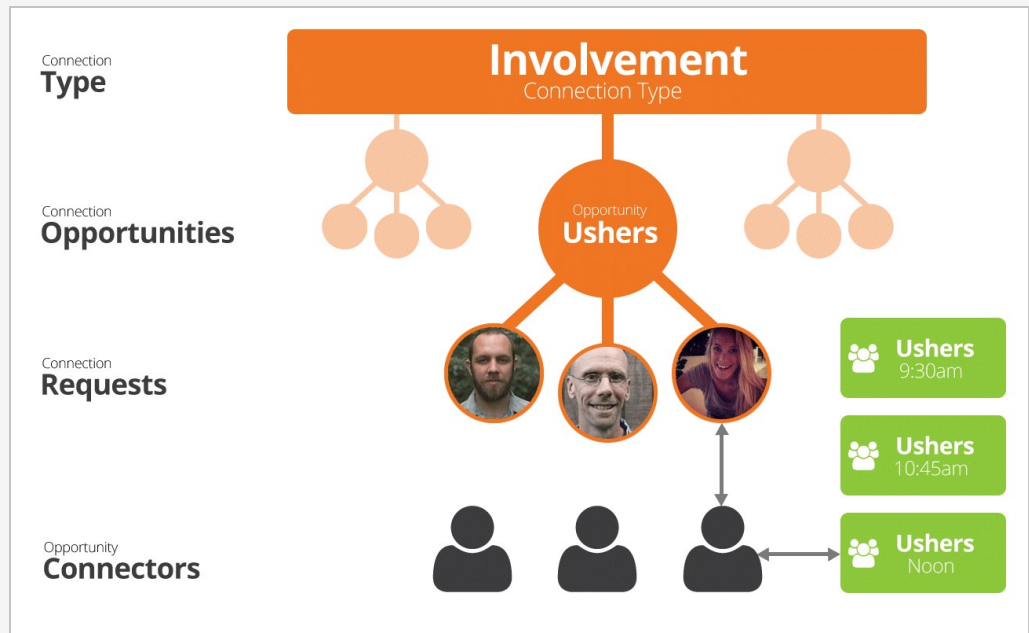# Connections

People | Groups | Workflows

Welcome

Many of your organization's strategies are about helping people move from one state to another. Often this movement isn't a straight line, but more of a meandering path. When the path takes an extended period of time it's possible for people to fall through the cracks.

This is where the Connections tool comes to our rescue. While workflows can be a great help by connecting people through automated processes, they can quickly become complicated and unwieldy in complex situations. The Connections tools provides a backbone that allows you to build advanced processes. As you'll soon see, workflows still play an important role in Connections but more so as an extension of the foundation instead of the foundation itself. But enough talk... let's see for ourselves what the Connections feature can do.

10,000 Foot View of Connections

When we started to work on the Connections features we were trying to solve a specific problem: connecting people who are wanting to serve. As we progressed through the ideation process, we started to see that this specific problem was really a reoccurring pattern inside of an organization. What we mean is, these features could be used in lots of different ways. With that realization we made the tool to be configurable for many different types of connection processes. Out of the box it's configured for a single *Involvement* (fancy term for serving) process, but we encourage you to build your own connection processes. You're not on your own, though; we'll show you how later.

In most connection processes the goal will be to take a person who wishes to be connected to a high-level *Opportunity* and walk them through a series of steps or activities until they can be connected to a specific group. This will make more sense if we look at an example. Let's consider the *Involvement* connection type.

Connections Overview

Connection Type
Remember that you can create as many connection types as you want. Each type should represent a specific organizational process.

Connection Opportunities:
Each connection type can have numerous opportunities. In the involvement type these would be the high-level ministry areas where someone might be interested in serving (Ushers, Greeters, Parking Lot, Children's, etc.).

Connection Requests
As people enter the connection process a *Connection Request* is created. This request could be generated by the individuals themselves through the website or entered manually by staff or volunteers.

Opportunity Connectors
Each opportunity will have a group of connectors (staff members, team leaders, etc.) that work with the individual request through the connection process. As you'll see, next they can generate multiple activities and change the status of the request as they move the individual through the process.

Placement Groups
The goal in many connection processes is to ultimately get the person to a specific group. For the involvement process, this may be a serving team but other connection types could place someone in a specific small group.

Okay, now that we've seen all the components of a connection process, let's learn a bit more about the lifecycle of a request. Requests have a couple of different properties that allow us to describe their current state and see a history of previous activities. Each of these properties is discussed below.

State

The state of a request describes the standing of the request. There are only four options for state:

- **Active:** The request is currently being worked.
- **Inactive:** The request has either been completed or canceled.
- **Future Follow-up:** Often requestors will need more time before they are ready to be fully connected. The future follow-up state allows us to *freeze* the request until a specific date. This is helpful as it allows the connector to remove it from view until the specified follow-up date.
- **Connected:** The request has completed the full connection process.

Status

You can define as many different statuses as you'd like for a request. These statuses are defined for each connection type. The statuses that have been configured for the Involvement connection type include:

- **No Contact:** This is the initial status of a request. It basically means nothing has been done with the request.
- **In Process:** Once a connector has been assigned and communication has been attempted, then the status should be changed to *In Process*.

Remember you can customize these statuses and add your own.

Activities

Activities are a listing of events that have occurred during the process of connecting the requestor. You can customize what these activities are. The involvement connection type is pre-configured with the following activities:

- **Called:** A phone call was made and the requestor answered.
- **Called Left Message:** Pretty much says it all.
- **Called No Answer:** You can probably figure this one out too.
- **Contacted Waiting for Reply:** Some type of contact was made and the request is waiting for a reply.

While each request will only have one value for state and status, they can have as many activities as needed.

Now that we understand the properties of requests, let's see them in action.

Connection Request Lifecycle
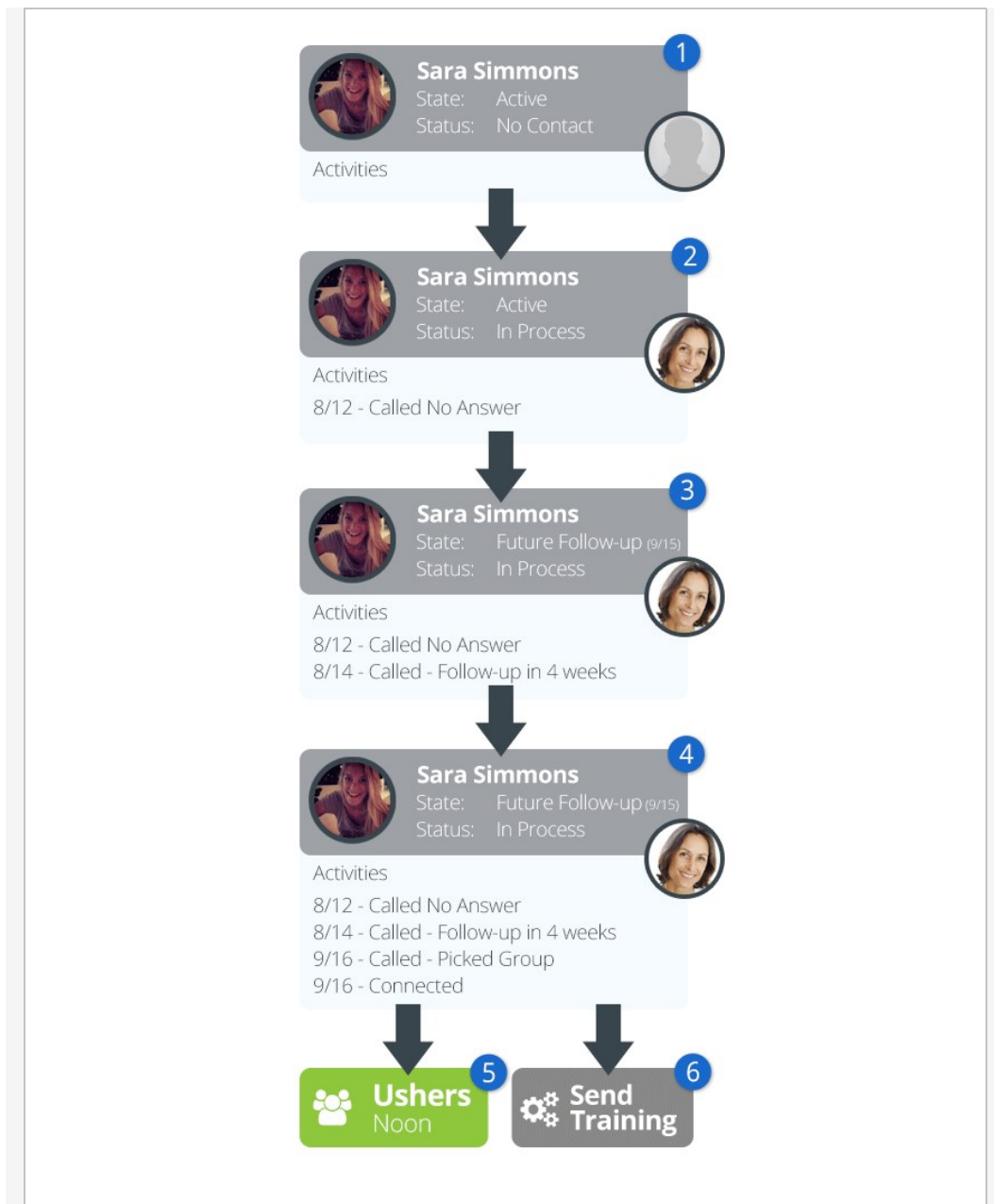
1 **New Connection**
Sara Simmons makes a request from the website to get connected into the ushers opportunity. From this, a new connection request is created with the *State* of *Active* and the *Status* of *No Contact*. Also note that at this point no *Connector* is assigned.

2 **In Process**
After seeing it, Alisha Marble assigns herself to the new request and makes a first attempt at contact with the requestor. Unfortunately, Sara was at her daily spin class and missed the call. At this point, Alisha changes the status of the request to *In Process* and adds an activity of *Called No Answer*.

3 **Future Follow-up**
In a few days, Alisha tries back and this time is able to reach Sara. After talking, Sara decides that it might be best to wait four weeks until things

settle down at the hospital where she works. Alisha now changes the state to *Future Follow-up* with a follow-up date of 9/15. At this point the request will be hidden from her list of requests until 9/15.

4 **Connected**
On 9/15 the request pops back up on Alisha's radar and she makes another call to Sara. During this call they conclude that Ushering at the noon services makes the most sense for Sara's schedule. Alisha then connects her to the group and marks the request *Connected*.

5 **Picks Group**
As a part of the *Connected* step, Alisha picks the group to connect Sara to. While the connection process doesn't have to always end with placing someone in a group, it will in most cases.

6 **Workflow**
We promised you workflows and here's a taste of them. Workflows can be set up to automatically launch when certain conditions of the request are met. In this case a workflow was defined to launch whenever someone was *Connected* that sends out some training materials. We'll look more at workflows soon.

The Role of Campus

Campus plays an important role in the connection process. As requests come in they will be attached to a campus. Also the connectors and assigned connection groups can be partitioned by campus. We'll see how to set this up later. For now just know that the connection opportunities can be shared for all campuses while still providing support for campus-specific requests.

Spotting Connections a Mile Away

Connection requests are shown prominently on the person profile page to help give you an overview of a person's connection at a glance. Each connection request listed on the profile page lists the connection type, opportunity, campus and status.

Person Profile Connection Requests

| Person Search | **Person Profile** | Extended Attributes | Groups | Contributions | Benevolence | Security | History |

❝ Timeline ➕

🔖 Bookmarked Attributes

🔻 Connection Requests

Involvement
Children's (Main Campus) - Connected
Children's (Main Campus) - In Progress

⇄ Known Relationships

Working With Requests

The Connections tools can be found under `People > Connections`. This page shows you the working environment for the connectors.

Request List

1. **Title**
   The title of the *Connection Type* that the opportunity list belong to.

2. **Opportunities**
   The *Connection Opportunities* that the logged-in user is a connector for.

3. **Badges**
   Colored badge(s) with a number shows the total count of requests in a particular state/status.

4. **Request List**
   A listing of *Requests* for the selected opportunity.

⑤ **Total Requests**
Each connection opportunity has a corner badge displaying the number of total connection requests.

⑥ **Badge Color Key**
This legend key explains what the color number badges represent.
- Blue - assigned to you
- Yellow - unassigned
- Orange - critical status such as *No Contact*
- Red - idle (no activity in a configurable number of days)

⑦ **Type View Toggle**
This toggle allows the user to select if they want to see *All Types* in the connection opportunities or *Active Types*, which would show only active requests.

⑧ **Request View Toggle**
This toggle allows the user to select if they want to see *All Requests* in the connection opportunities they are a connector for or *My Requests*, which would only show requests in which they are assigned as the connector.

⑨ **Total Requests**
This badge displays the total number of connection requests, across all connection types.

⑩ **Configure Connection Types**
Those in the *RSR – Connection Administration* security role will also be allowed to configure the connection types. More on this later.

⑪ **Campus Filter**
The campus filter toggle allows you to select which campus connections to view.

Selecting a request will show you its relevant details.

1 Requestor

This is the person that is in the process of being connected.

2 Request Labels

At the top of the details screen you'll also note several labels. These include (in order):

- Campus
- Connection Opportunity
- Status
- State

3 Contact Information

The contact information for the requestor is shown to help speed up the process of contacting the individual. You'll also note that there is a quick link to the right that will take you to the requestor's full profile.

4 Connector

The currently assigned connector.

5 Placement Group

This is the group that the person will be added to when the request is

connected. The groups that display in this list are configured on the *Connection Opportunity Detail* screen. You will learn more about these settings in the Configuring Connection Types chapter. For now, just know that you can limit the groups displayed here. Also note that this list of groups will be filtered by the campus of the request.

6 **Edit**

This allows you to edit the Connector, State, Status and Assigned Group.

7 **Transfer**

This allows you to transfer the request to another *Connection Opportunity*. We'll talk more about transferring later.

8 **Connect**

Select this button to complete the connection process. This will drop the person into the group and mark the state as *Connected*.

9 **Workflows**

If any workflows have been initiated for this request, you will see their current state here.

10 **Activities**

This is a list of activities for the request. You may notice that some requests' activities are highlighted in blue while other activities are white. The activities with a blue background color represent those that are for this specific request. Activities without the blue highlights are activities that are from other requests in the same connection type. Additionally, you can only remove the activities you've added, the red x will be greyed out otherwise.

You might be wondering why you'd ever want to see these activities. It's not uncommon for overly ambitious requestors to sign up for multiple connection opportunities at once. Viewing the activity in other opportunities allows you see that they are being contacted by more than one connector.

This functionality can be disabled if needed. More on that later.

Adding Activities

You can add new activities by selecting the ⊕ button. This brings up the *Add Activity* window.

Adding Activities

Transferring a Request

During the connection process it's common that the requestor (or connector) decided that this opportunity isn't a great fit. The transfer feature is a quick and powerful way to ensure the requestor is able to find a new opportunity that works for them.

Selecting the `Transfer` button will bring up the transfer screen below. While it looks pretty simple, it has some powerful capabilities.

Transfer a Request

1 **New Opportunity**
This is where you'll select their next opportunity.

2 **Search**
This allows you to find the best next opportunity. We'll dive deeper into this next.

3 **Status**
This allows you to select the new status when the request is dropped into the new opportunity. The default status is already selected for you so in most cases you won't want to change this.

4 **Connector**
Most of the time you'll want to clear the current connector when you transfer the request. Sometimes you'll want to select a new connector. The options provided here allow you to select:
  - The default connector for the opportunity
  - The current connector (whose name, if available, will be displayed here)
  - A new connector (which you can choose from the dropdown that displays when the option is selected)
  - No connector

5 **Note**
This allows you to send a note on to the new connection team.

Through the transfer process you want to make sure you find each individual the right next opportunity. Otherwise they might feel like a hot potato. The `Search` button allows

you to look at all of the new opportunities to help coach them on what might be best for their personality and situation. Below is the search screen for the involvement connection type.

Transfer Search
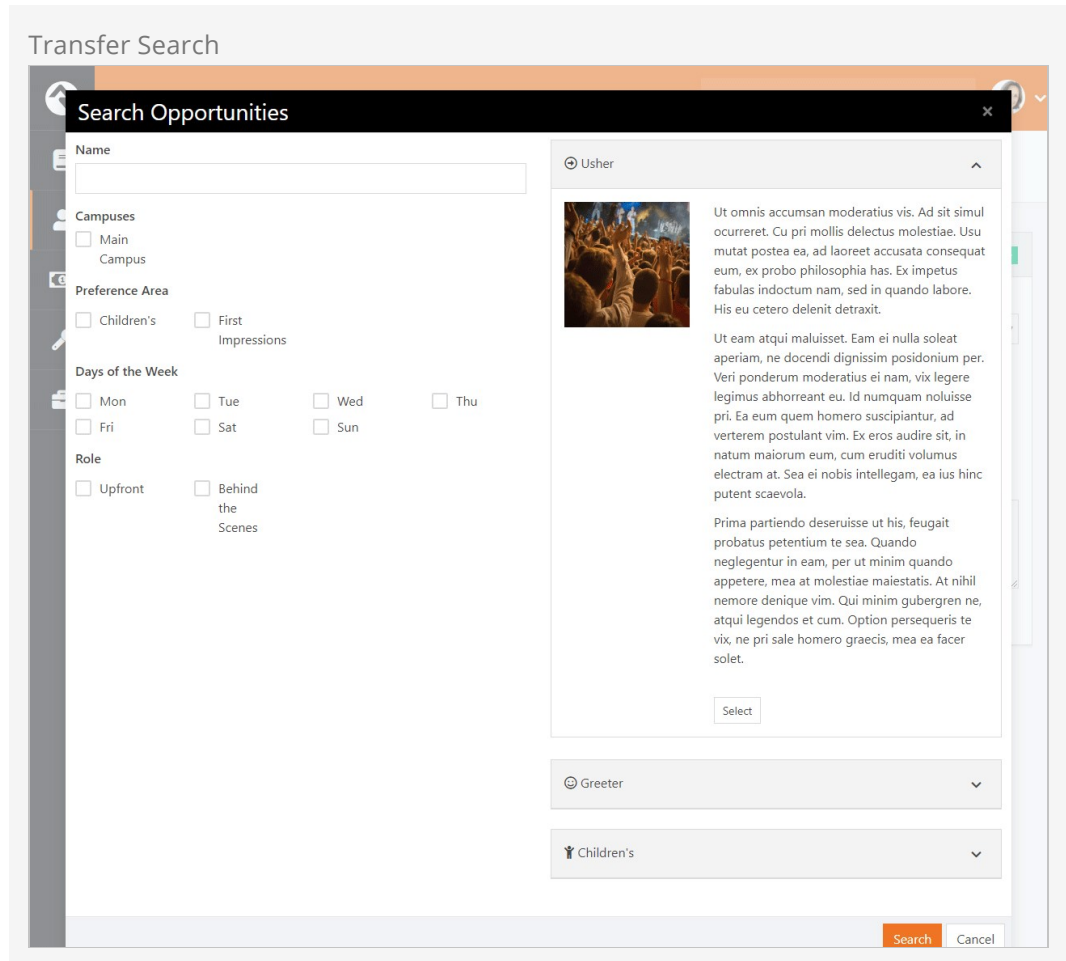
Displaying Connection Badges

Connection badges allow you to quickly view a person's connections. The badges are displayed on the *Connection Request Detail* screen.

Connection Badges

1. **Connection Badges**
   Shows which connections are associated with a person.

You can choose which connection badges to display by editing the *Connection Request Detail* block settings.

Connection Request Detail Block Properties
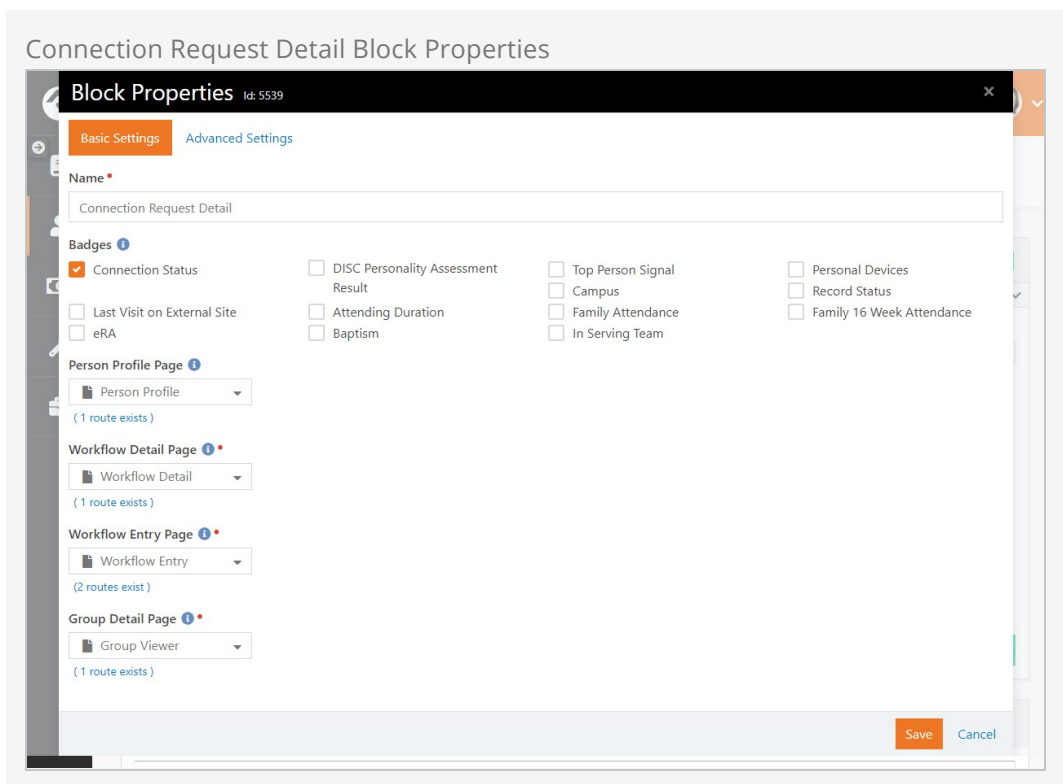
From the *Connection Request Detail* screen, turn on block settings and open the *Connection Request Detail* block properties. Select which badges you want to display and click the `Save` button. Those badges will now be displayed for anyone with those connections. Super easy!

Entering New Requests

There are three ways to enter new connection requests. Let's look at each one in detail below.

Self-Service

Rock ships with blocks that allow you to create a self-service entry to the connection process. This has been pre-configured on the external website for the involvement connection type under `Connect > Serve`.

Opportunity Search

Here you will see the search page for finding involvement opportunities. It allows you to filter by campus and also by various attributes about the opportunity (we'll show you how to configure these below). Selecting an opportunity will display its details.

Opportunity Detail

From the details page, the guest can then choose to connect with the opportunity. This action creates a connection request.

Staff Entry

As discussed above the staff can also enter requests from the internal site under `People > Connections`.

Workflows

Rock also ships with a workflow action that can create a new request. This is a powerful way of creating your own request screens using the workflow entry actions. See the Connection Workflows chapter below for more information on how you can configure workflows to best use the connection features.

Configuring Connection Types

Out of the box Rock ships with a single connection type for Involvement. But that's just a starting point for all the options within connections. Let's walk through the configuration capabilities of the connections features to see what's possible.

The first step is to see a listing of all the connection types that have been configured in the system. You can see this screen by clicking the ⚙ from the *My Connections* page under `People > Connections`.

Selecting a connection type from the list will display the details for the type as well as a list of all the connection opportunities that have been defined.

Connection Type Detail

Let's start by looking at the configuration options available for a connection type.

Connection Type Edit

Attribute	Field Type	Allow Search		
≡ Preference Area	Single-Select	✓	✏	✖
≡ Days of the Week	Multi-Select	✓	✏	✖
≡ Role	Multi-Select	✓	✏	✖
			⊕	

7 Activities ⌃

Activities		
Called	✏	✖
Called Left Message	✏	✖
Called No Answer	✏	✖
Contacted Waiting for Response	✏	✖
	⊕	

8 Statuses ⌃

Name	Description		
In Progress		✏	✖
No Contact		✏	✖
		⊕	

9 Workflows ⌃

Workflow Type	Trigger	
No Workflows Found		
		⊕

Save   Cancel

Crafted by the Spark Development Network / License

1 **Basic Configuration**
The first few items cover the basics like Name, Description, Active/Inactive and an icon for the type.

2 **Days Until Request Considered Idle**
Setting this number determines how the red (idle) colored badges shown in the My Connection Requests area are totaled.

3 **Enable Future Follow-up**
We discussed the future follow-up feature previously. It allows a request to be frozen until a specific date. You can decide whether that feature is available on each connection type you set up.

4 **Enable Full Activity List**
We also talked about how a request can show activities from other requests made by the same individual. You have the option to disable that

functionality on a connection type basis.

5. **Requires Placement Group To Connect**
   If checked, this will prevent the Connect button from activating on a *Request* unless a *Placement Group* is set.

6. **Opportunity Attributes**
   Here you will define attributes about the opportunities. These attributes are mainly used to power the opportunity search screens. Enabling *Allow Search* allows the attribute to be filtered on by a user using an opportunity search.

7. **Activities**
   Each connection type allows you to define types of activities that a connector can make on a request.

8. **Statuses**
   You can create as many request statuses as you like for your requests.

9. **Workflows**
   Next you will define any workflows that you would like to be able to trigger from your request. Configuring workflows here will apply the workflows to requests of every opportunity type. We'll talk about these workflows in detail in the next chapter. You're going to love what you can do with these!

So there is the connection type. Now let's look at creating and editing opportunities. Selecting an existing opportunity or clicking to add a new one will bring up the screen below.

Connection Opportunity Detail

Campuses

7 ☑ Main Campus ☐ North Campus

6

Opportunity Attributes ⌄

8

Preference Area
○ None ○ Children's ● First Impressions

Days of the Week
☐ Mon ☐ Wed ☐ Fri ☑ Sun
☐ Tue ☐ Thu ☑ Sat

Role
☑ Upfront ☐ Behind the Scenes

Placement Groups ⌄

9

Placement Group Configuration

Group Type	Group Member Role	Group Member Status	Use All Groups of This Type		
Serving Team	Member	Pending		✏	✖

⊕

10 Placement Groups

Name	Group Type	Campus	
Ushers	Serving Team		✖

⊕

Connector Groups ⌄

11

Group	Campus		
Global Connector Group	Main Campus	✏	✖

12 Main Campus Default Connector

[▼]

⊕

13 Workflows ⌄

Workflow Type	Trigger
Photo Request	Manual

⊕

[Save] Cancel

Crafted by the Spark Development Network / License

---

1 Name
The name of the opportunity.

2 Active
This determines if the opportunity is active. This is helpful if you have seasonal opportunities.

3 Summary
A brief summary that will display on the search results page.

4 Details
This gives more information about the specific opportunity.

5. **Public Name**
This name will be used on the blocks that are displayed to the general public.

6. **Photo**
Sometimes the best way to sell an opportunity is to show it in action.

7. **Campuses**
This defines which campuses the opportunity is for.

8. **Opportunity Attributes**
Remember setting up the opportunity attributes for the *Connection Type*? This is where you'll provide their values.

9. **Placement Group Configuration**
The next few settings help to configure how the request will process the adding to groups when the request is marked *Connected*. Let's review each setting:
   - **Group Type:** This defines which group type the available groups will be. We need to know this so we can personalize some of the other settings like role and status.
   - **Group Member Role:** The role the person will be assigned when they are connected, or added, to the group.
   - **Group Member Status:** The configured status the person will receive when they are added to the group.
   - **Use All Groups Of This Type:** Each opportunity will have a selected list of groups that a person can be connected to. This setting says instead of our having to select every group of a certain type (and keep it current) just use all of them.

10. **Placement Groups**
These are the groups that will be displayed as options to connect the requests to. The campuses defined on these groups is important as they will be used to filter for the campus of the request. You'll define this campus from the group details page of the group.

11. **Connector Groups**
Next we'll define the various groups that contain the connectors who will work the requests as they come in.

12. **Connector drop down**
You can optionally define a default connector for each campus. Any new requests originating at a campus will then default to the specific campus' connector. The drop down will show a list of active members from the connector group listed.

13. **Workflows**
We saw that we could define workflows when configuring the connection type. Configuring it there would apply the workflows to all opportunities of that type. You can also configure workflows for a specific opportunity here.

After setting up a connection type, you can duplicate it to create additional types. To duplicate an entire connection type, click the ▢ button on the *Connection Type Detail*

screen.

Connection Type Copy

Connection Type Detail
Home > Connections > Connection Types > Involvement

Involvement

A connection type for church member involvement.

Edit   Delete

Connection Opportunities

Filter Options ∨

Name	Summary	Status
Children's	If you love kids, this is the ministry for you. Our children's team has the opportunity to share God's love in a direct and tangible way. You have the option of working with many different age ranges. No experience is	Active

Once copied, the duplicated connection type is displayed in the *Connection Types* screen. From there you can edit its settings in the *Connection Type Detail* screen. Note, if you need to delete the duplicated connection type, you'll need to first delete all of the Connection Opportunities listed in its *Connection Type Details* screen.

Placement Group Configuration

An important part of the connection process is the selection of a group to place the person in when they are connected. The definition of these 'selectable' groups is highly configurable. Knowing all of your options will increase the power of your connections processes.

Configuration

Let's say for instance that we'd like our *Children's* connection opportunity to allow placement into three different serving teams. We'd also like the connector to be able to place them into the groups as either a *Leader* or a *Member*. Finally, if they are a *Member* of the group we'd like for the connector to be able to place them with the member status of *Active* or *Pending*. That's quite a list of requirements... let's see how we can configure the *Children's* opportunity to do just that.

You can set up placement groups in the *Connection Type* configuration screen. Here you'll find a panel for setting placement group options. The screen below shows the configuration for the example given above.

Placement Group Configuration

1 Placement Group Configuration
The first things we configure are the group types, roles and statuses that will be options for our placement groups.

2 Group Member Status
Note that we configured two different options for the role of *Member* for the group type of *Serving Team*. One option allows for the Group Member Status of *Active* the other for *Pending*.

3 Group Member Role
Next, we configure the one option for the *Leader* role.

4 Placement Groups
With our roles and statuses configured we can now select the specific placement groups for the opportunity. In this example, you'll notice that we've selected three different serving teams.

In our example above we specifically picked each placement group that is an option for the connection opportunity. This will work in most cases. But if you wanted the list to show every group of a specific group type, you could configure that as well. This eliminates the need to configure new groups when they are added.

Results

With our configuration in place, let's see the fruits of our labor. The screen below shows the editing of a connection request for Helen Evans who is interested in helping in the *Children's* area. Let's walk through how the placement group settings drive the process of selecting a group.

Placement Group Example

1. **Placement Group**

   Once you select a placement group, options will appear below allowing you to select roles and statuses. The screen will only show these settings if more than one option exists. So, for instance since the role of *Member* is selected, the option of *Group Member Status* is displayed since we can choose to add them as *Active* or *Pending*. If on the other hand, we selected the role of *Leader*, the *Group Member Status* option would disappear since the only option is *Active*.

2. **Hours Serving**

   You'll also note that group member attributes are shown on this screen. This allows you to set these values quickly as you place the individual into the group.

Group Requirements

If a group has specific requirements to join, these will be checked before saving the placement group. If they do not meet the requirements, you will not be able to save the placement group.

Placement Group Requirements

Connection Workflows

On their own, the connection features are very powerful. Adding workflows to the mix though magnifies what you can do. Let's take a look at how you can set up workflows for your connections.

You can define workflows for your requests for the connection type (in which case they will be applied to all request in all opportunities) or for a specific opportunity. In either case the configuration is the same.

Connection Workflows

Select Workflow   ✕

Launch Workflow When *   Workflow Type *

Status Changed   ▼   ⚙   ▼

From

▼

To

▼

                                                Save   Cancel

There are two basic items that you'll need to configure:

- **Trigger:** This defines when the workflow should be started. The options are:
    - **Request Started:**Executed when the request is first started.
    - **Request Connected:** Fired when the request is marked as connected.
    - **Status Changed:** This workflow is launched when a status change has occurred. You optionally have the ability to limit this trigger to certain pre/post status values.
    - **State Changed:** Like the status change trigger but this time for state.
    - **Activity Added:** This trigger will be launched every time an activity is added to a request. You can also filter this to a specific kind of activity.
    - **Placement Group Assigned:** This workflow will be launched when a placement group is assigned.
    - **Manual:** This workflow will be added to the request detail screen to allow the connector to manually execute it.
- **Workflow:** This is the simple part. This defines which workflow will be executed when the trigger condition is met.

Building Connections Workflows

When the workflows above are executed, the initial activity of the workflow will have access to the connection request through the workflow entity property. It's important that this initial activity gets the information it needs to process from the request. The main action you'll use to get the properties from the request is *Set Attribute From Entity*. You can use the *Lava Template* field of this action to pull each request. Below are a few samples:

Get The Requestor – Attribute Type: Person
{{ Entity.PersonAlias.Guid }}

Get the Connector Person (if any) – Attribute Type: Person
{{ Entity.ConnectorPersonAlias.Guid }}

Get the Connector Group – Attribute Type: Group
{{ Entity.AssignedGroup.Guid }}

Opportunity Type – Attribute Type: Text
{{ Entity.ConnectionOpportunity.Name }}

Status – Attribute Type: Text
{{ Entity.ConnectionStatus.Name }}

State – Attribute Type: Text
{{ Entity.ConnectionState }}

> ### The 'Add Activity' Workflow Trigger is a Bit Different
> While most of the workflow triggers pass the opportunity request through the workflow entity the 'Add Activity' actually passes in the new activity. If you'd like to set a 'Connection Request' attribute with the value of the opportunity request you can use the following Lava:
> {{ Entity.ConnectionRequest.Guid }}

> ### Connection Attribute Types
> Rock provides several attribute types to help you build workflows. These include:
>
> - Connection Request - Set by Guid
> - Connection Status - Set by Guid
> - Connection State - Set by Enum value
> - Connection Type - Set by Guid
> - Connection Opportunity - Set by Guid
> - Connection Activity Type

Connection Workflow Actions

To facilitate even more power with connections we've added several workflow actions. They're outlined below.

Create Connection Request

Creates a new connection request with the following settings.

1. **Person Attribute** - The Person attribute that contains the person that connection request should be created for.
2. **Connection Opportunity Attribute** - The attribute that contains the type of connection opportunity to create.
3. **Connection Status Attribute** - The attribute that contains the connection status to use for the new request.
4. **Connection Status** - The connection status to use for the new request (when Connection Status Attribute is not specified or invalid). If neither this setting or the Connection Status Attribute setting are set, the default status will be used.
5. **Campus Attribute** - An optional attribute that contains the campus to use for the request.
6. **Connection Request Attribute** - An optional connection request attribute to store the request that is created.

Transfer Connection Request

Transfers a connection request to a new opportunity type.

1. **Connection Request Attribute** - The attribute that contains the connection request.
2. **Connection Opportunity Attribute** - The attribute that contains the type of the new connection opportunity.
3. **Transfer Note** - The note to include withthe transfer activity.

Set Connection Request Status

Changes the status of a connection request.

1. **Connection Request Attribute** - The attribute that contains the connection request.
2. **Connection Status Attribute** - The attribute that contains the connection status.
3. **Connection Status** - The connection status to use (if Connection Status Attribute is not specified).

Set Connection Request State

Changes the status of a connection request.

1. **Connection Request Attribute** - The attribute that contains the connection request.
2. **Connection State Attribute** - The attribute that contains the connection state.
3. **Follow Up Date Attribute** - The attribute that contains the follow-up date when state is being set to Future Follow Up.
4. **Follow Up Date** - The follow-up date when state is being set to Future Follow Up (if Follow Up Date Attribute is not specified).

Add Connection Request Activity

Adds a new connection request activity.

1. **Connection Request Attribute** - The attribute that contains the connection

request.

2. **Connection Activity Type Attribute** - The attribute that contains the activity type to add.
3. **Note** - The note or an attribute that contains the note for the new activity.
4. **Person Attribute** - An optional Personattribute that contains the person who is adding the activity.