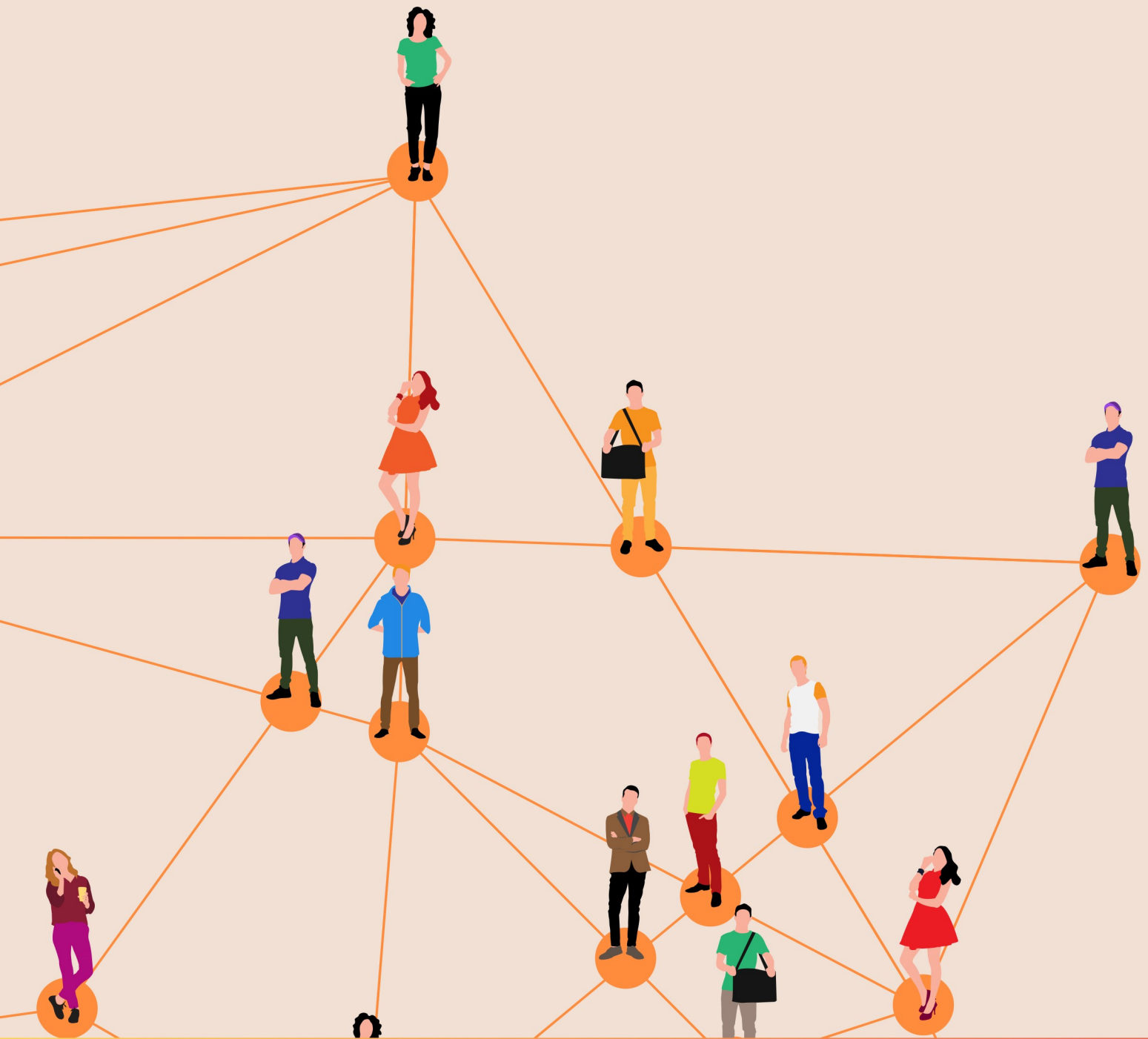# Engagement

Pathways for deeper connection.

ROCK

Welcome

> "Without continual growth and progress, such words as improvement, achievement, and success have no meaning."
>
> -Benjamin Franklin

The ability to grow and adapt in an ever-changing world is a driving factor behind any successful organization. As individuals we also strive for growth, but you can only go so far on your own. At any level, growth requires engagement. That may sound straightforward on the surface, but successful engagement can be a very complex and long-term undertaking.

It's often better to break up complicated tasks into manageable pieces instead of trying to tackle everything at once. That's why Rock enables you to approach engagement from different angles using three sets of complimentary tools. With Connections you can move people from being disconnected to being plugged in. With Steps you can lay out a walkable path to the top of the mountain. With Streaks you can monitor engagement patterns. This book will show you how the power of these engagement features can help ensure the growth of your organization and the individuals within it for years to come.

Connections

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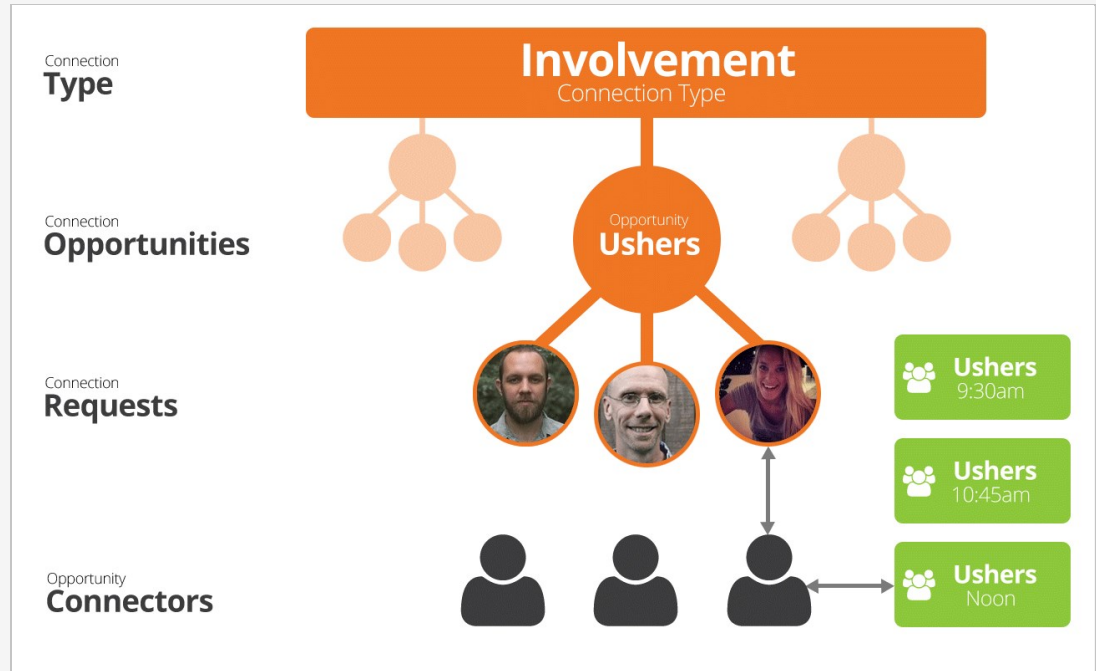
Connection Type
Remember that you can create as many connection types as you want. Each type should represent a specific organizational process.

Connection Opportunities
Each connection type can have numerous opportunities. In the involvement type these opportunities 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. The state will be changed back to Active by the *Connection Request Workflow Triggers* job based on the 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 Progress:** Once a connector has been assigned and communication has been attempted, then the status should be changed to *In Progress*.

Remember you can customize these statuses and add your own. For instance, you could have a status for *In Training* or *Complete*.

You can automate the process of moving individuals from one status to another. See the Automating Status Changes section below for details.

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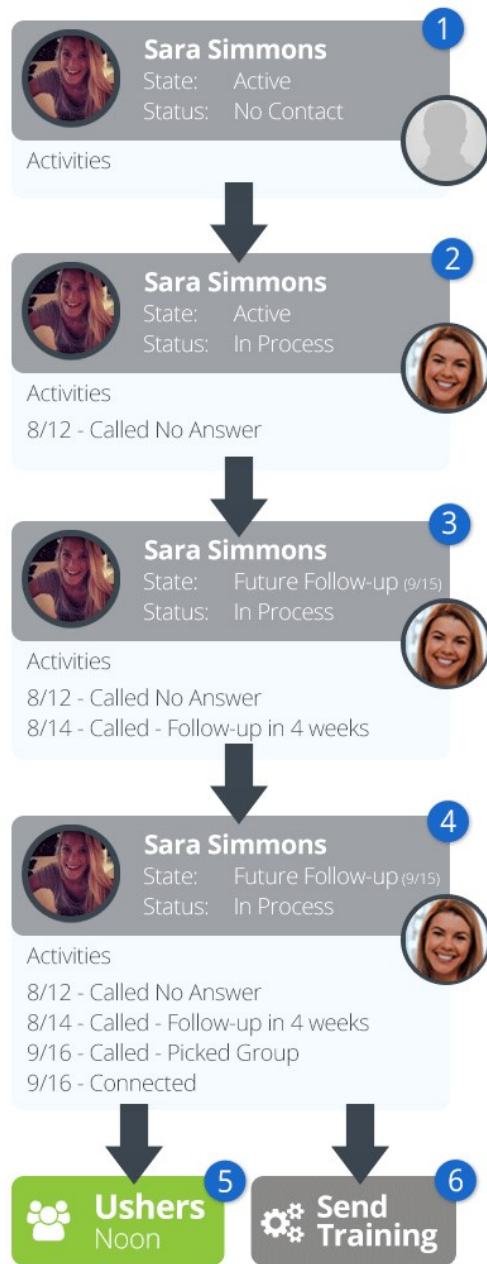
1 **New Connection**
Sara Simmons makes a request from the website to get connected into the ushers opportunity. From this, a new connection request is created with the *State* of *Active* and the *Status* of *No Contact*. Also note that at this point no *Connector* is assigned.

2 **In Progress**
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 Progress* and adds an activity of *Called No Answer*.

3 **Future Follow-up**
In a few days, Alisha tries calling again 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, particularly for multi-campus sites. 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.

You can edit the settings on this block to choose which connection requests to show based on their State.

Working With Requests

The connections tools can be found under `People > Connections`. This page gives you an overview of your organization's Connection Requests, grouped and summarized by each Connection Opportunity and Connection Type. This is typically how you'll access individual Connection Requests for specific people, which you can view as either cards or in a list format, but we'll get to that in a bit. First, let's take a look at the *Connections* page to see what we have to work with.

1. **Color Key**
   Each Connection Opportunity card has colored circles with numbers in them, and this key tells you what those colors mean. Hover your mouse over the circles in the key to see their description.
   - Blue – Assigned to You
   - Yellow – Unassigned Item (not assigned to anyone)
   - Orange – Critical Status (e.g., person has not been contacted)
   - Red - Idle (no activity in a configurable number of days)

2. **Connection Type Configuration**
   Click the icon to manage your Connection Types. Rock admins and those in the RSR – Connection Administration security role will have access to this. We'll talk more about configuring connection types below.

3 **Favorites**

You can "favorite" individual connection opportunities by clicking the star in the top right corner of the opportunity's card. Favorited opportunities will automatically appear at the top of the page under the *Favorites* heading, so you don't have to go hunting for the ones you work with most often.

4 **My Active Opportunities**

If you turn this on, the rest of the page below will be updated to show only opportunities with active requests that are assigned to you.

5 **Campus**

Selecting a campus here will filter requests to show only those from that campus. When you click on a connection opportunity, the campus you select will automatically be applied as a filter when viewing the list (or board) of requests.

6 **Connection Types**

Below your Favorites (if you have any set) you'll see headers for each Connection Type. Connection Opportunities are displayed as cards below the name of the Connection Type to which they belong. In this example we have two Connection Types displayed, one for *Involvement* and one for *Special Mission Trips*.

7 **Connection Opportunity Cards**

Each Connection Opportunity is displayed as a card. You can click on these cards to access details about the opportunity. We'll show you what that looks like below.

8 **Opportunity Badges**

At the bottom of each card, if applicable, you'll see colored badges with a number that shows the total count of requests in a particular state/status (see #1 above). If there are no requests, or if all the requests have been closed out, you won't see any badges for that opportunity.

See More with Lava

If you're feeling creative (and a little ambitious), this block's settings let you customize the opportunity cards using Lava. For instance, you can deploy the `OpportunitySummary.StatusCounts` array to display counts by Status. Just keep in mind that with very large volumes of connection requests, certain changes may have performance impacts.

Clicking on any of the Connection Opportunity cards will bring you to the *Connection Board*, pictured below. The *Connection Board* gives you an overview of all the requests for the selected opportunity. Not only can you see each individual request, but you can also manage the Status of those requests without having to access each one individually.

Connection Board
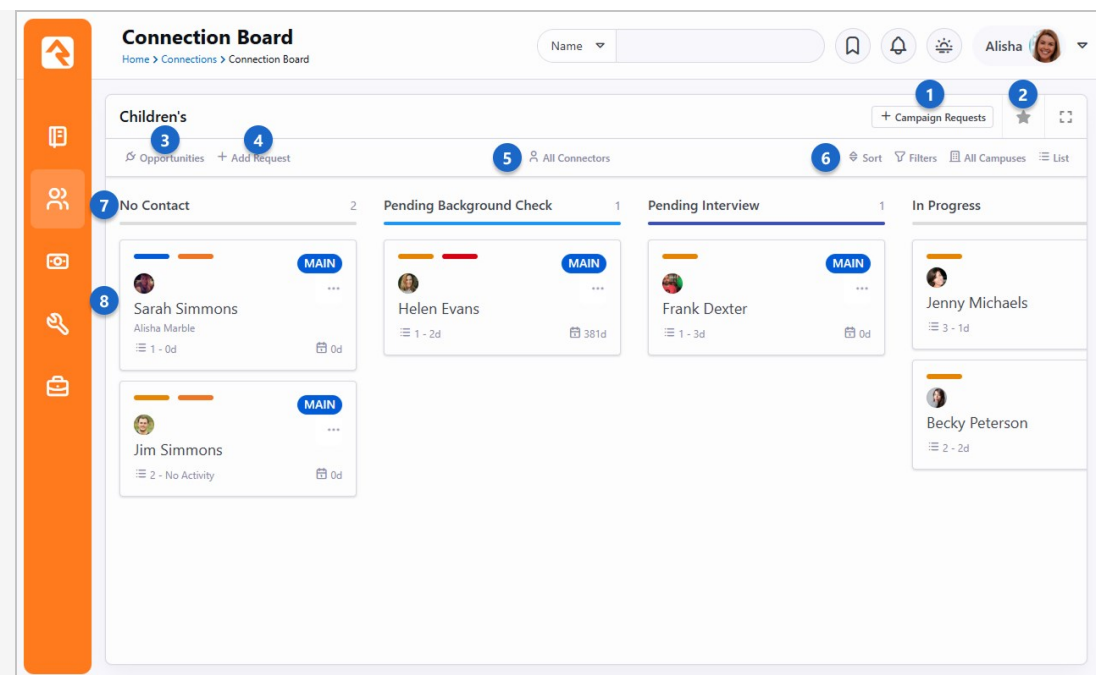
1 Campaign Requests

See the Connection Campaigns chapter below for the details on what this button does. In short, clicking this button allows a person to create more requests from the campaign list.

2 Favorite

You can add or remove the Connection Opportunity from your Favorites by clicking the star icon. This is the same as the favorites we talked about above on the *Connections* page.

3 Opportunities

In the screenshot above we're looking at the Children's opportunity. You can quickly and easily switch between opportunities by clicking `Opportunities` and selecting an option from the list that appears. Opportunities that you've favorited will be listed first.

4 Add Request

Click here to add a new request for this opportunity. People can submit Connection Requests from your public website, which we cover below, but staff/volunteers can use this button to add requests themselves if needed.

5 Connectors

This filter lets you view cards for all connectors, your connections or for specific connectors other than yourself.

6 View Options

Use these to change how the cards are sorted, to apply filters or to view connections only for certain campuses. Each of these has different options, so feel free to experiment until you find the view that works best for you. There's also a icon you can use to switch between the List and Board views, which we'll talk about in detail below.

7 Request Status Columns

You'll notice that each connection request card is grouped into a vertical column. This represents the *Status* of the request, making it easy to quickly see which people are in what status. Even better, you can change the status of a request by clicking and dragging the card from one column to another. Or, see the Automating Status Changes section for details on automatically moving requests from one status to another.

There is a maximum number of cards that can be viewed at once in each column, which is set to 100 by default but can be changed in the block's settings.

8 Connection Request Cards

Each card represents a connection request for an individual. Aside from the person's

name and photo, there's a lot of useful information packed into these little cards. For instance, you can see the same color-coded badges that are visible from the Connections page as discussed above. You can also see a count of how many Activities have been added to the request, and how long it's been since the most recent Activity. Clicking on the card itself will open up the details of the request, which we'll cover below.

List View

As we mentioned above, you can click the icon in the top-right of the block to toggle between the *List* and *Board* views. Since we've already seen the board view, let's shift over to the list view. You can see that both views are similar, but we'll highlight some key differences you'll want to know about.

Connection Board List View

Grid Options

1 The first thing you might notice about the list view is that the connection requests are in a grid. This opens the doors to additional actions you can take like launching workflows or exporting to Excel. There's also a special bulk update feature that we'll discuss more below.

List View Columns

2 The list view shows a lot of the same information as the board view, but with some additional details. For instance, you can see both the State and Status, as well as the last Activity that was performed.

Action Icons

3 With a single click you can go directly to the *Person Profile* page for the person by clicking the icon. You can also delete the request by clicking **X**.

If you have request security enabled, you'll also see the icon which you can use to update security for the individual request.

Rows Per Page

4 The list view is best when it comes to handling large volumes of requests. Controls like these are already in place to help you navigate very long lists. Viewing hundreds or perhaps thousands of requests in the board view, while possible, might result in performance issues that can be avoided by sticking with the list view.

Connection Request Bulk Update

You might have noticed the ☐ icon pictured in the screenshot above. While you may be used to seeing this icon on other grids, it has a special function for connection requests. Instead of the traditional bulk updates that are normally performed, here you can make updates that are specific to connection requests. Let's take a look at the options.

1. **Campus Filter**
   If you have multiple campuses, bulk updates to connection requests can only be performed one campus at a time. This is where you select which campus's requests you want to update.

2. **Optional Updates**
   Here you can choose to change the opportunity, status or state for the connection requests. Just like other bulk update screens, you need to click in the small circle next to *Status* and *State* to update these fields.

3. **Connector**
   Select whether to keep the current connector, keep the default connector, select a connector from the configured list of connectors or assign no connector.

4. **Launch Workflow**
   If a workflow type is selected, then one workflow will launch for each connection request. The connection request itself will be passed to the workflow using a key of *Request*.

5. **Add Activity**
   You can optionally choose to add an activity to the selected connection requests. Clicking the *Add Activity* checkbox will cause the other activity fields to appear.

Connection Request Detail

We've seen connection requests at a high level, but now it's time to get into the weeds. Accessing any request from either the *List* or *Board* views will show its details as pictured below.

1 **Request Labels**
At the top of the details screen pictured above you'll see several labels. These include (in order):
- Campus (if applicable)
- Connection Opportunity
- State
- Status

2 **Requestor**
This is the person that is in the process of being connected. You can update the block settings to provide custom Lava that will render above the person's name.

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's a quick link to the right that will take you to the requestor's Person Profile.

4 **Connector**
The currently assigned connector is displayed for reference, but you can quickly change the connector (or assign one if nobody is assigned yet) by clicking in this area.

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'll 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 **Lava Badge Bar**

If configured in the block's settings, a custom badge bar for the connection request will be displayed here.

7 **Connection Request Attributes**

Connection request attributes can be displayed here and will be grouped under tabs according to their category. If some attributes have categories and some don't (as pictured in the example screenshot above) an "Attributes" tab will be added for those without a category. In this case, we have attributes assigned to the categories of Orientation and Training, so we see those tabs. We also have one attribute called "Planned Start Date" that isn't assigned to any category, so it falls under the Attributes tab. If none of the attributes have categories, then you won't see any tabs.

8 **Available Workflows**

Many of the workflows will be automatically triggered by events to the request (like changing statuses). You can also define manual workflows that can be launched by the connection team at any time. When defined, these workflows will be displayed here.

9 **Edit**

This allows you to edit the details of the request, including the Connector, State, Status and Assigned Group.

10 **Transfer**

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

11 **View History**

Click the *View History* link to open a new page that lists updates and changes to the request. You can see things like when the request was created, status and state changes or when the person was connected.

12 **Connect**

Select this button to complete the connection process. This will drop the person into the group and mark the state as *Connected*. This button can be hidden by changing the opportunity's configuration as described in the Configuring Connection Types chapter.

13 **Activities**

This is a list of activities for the request. You may notice that some 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. You can only remove the activities you've added, otherwise the "**X**" will be greyed out.

14 **Workflows**

You can expand this area to show any workflows that have been initiated for this request, as well as the status (e.g., Running, Complete) of those workflows. Both manual and triggered workflows will appear in the list.

You might be wondering why you'd ever want to see activities from other opportunities. It's not uncommon for overly-ambitious requestors to sign up for multiple connection opportunities at once. Viewing activities from one opportunity in other opportunities allows you to 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

You can use entity attributes to enter additional details related to the activity. Those attributes will be added to the window above according to your setup.

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 can find a new opportunity that works for them.

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

Transfer a Request

1 Opportunity
This is where you can select a different opportunity for the individual, if needed. By default, the opportunity being viewed is selected.

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. This can be shown or hidden based on the opportunity's configuration.

4 Connector
Most of the time you'll want to clear the current connector when you transfer the request. Sometimes you'll just want to select a new connector without changing the opportunity. Either way, 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 Campus
If enabled in the opportunity's configuration, and if you have more than one campus, you can transfer the request to a different campus using this drop-down.

6 Note
This allows you to send a note 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 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.
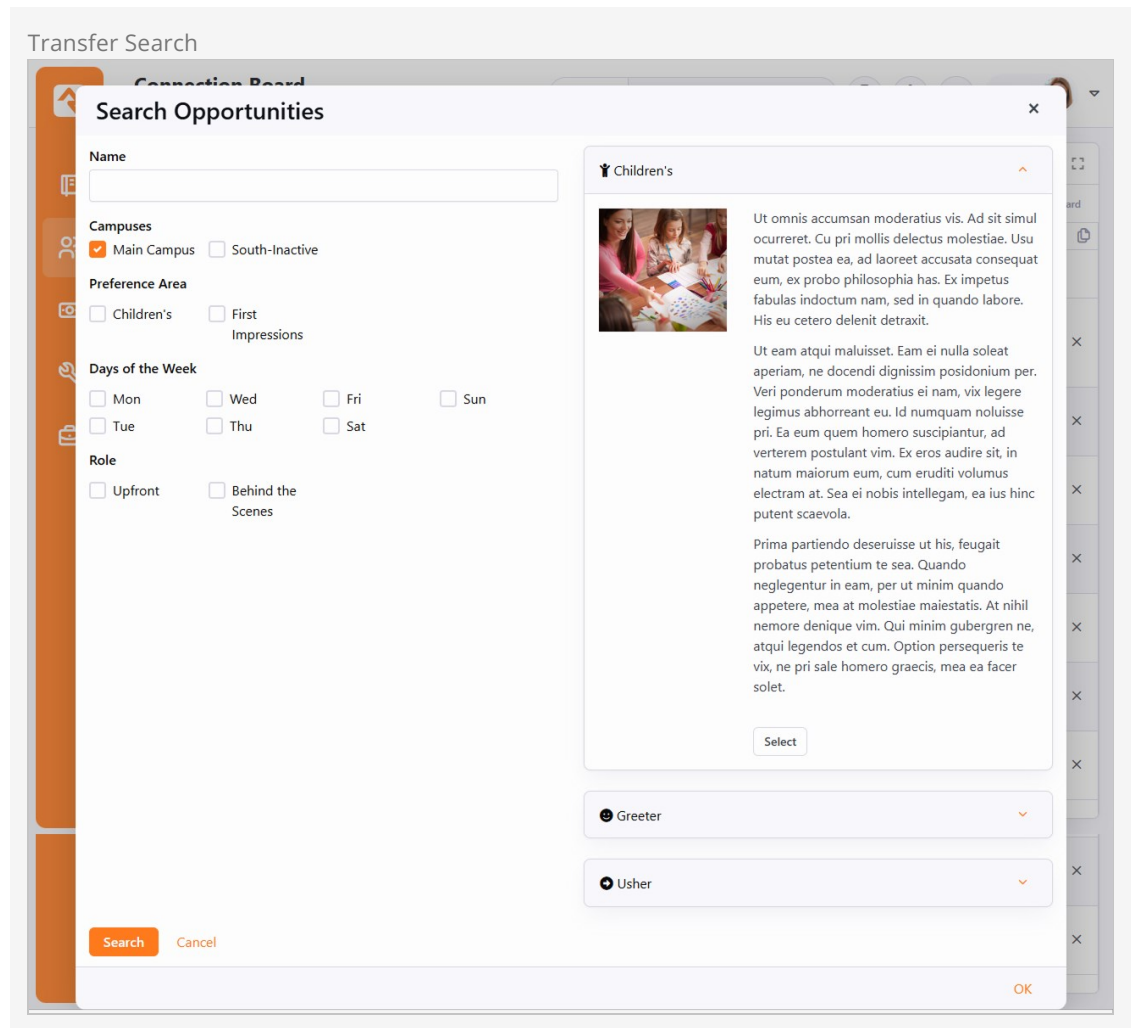
Displaying Badges

Badges are a great way to see a lot of information about a person at a glance. Displaying badges on your connection requests can save staff from having to look elsewhere for the information they need to get the right people connected to the right opportunities.

Connection Badges

In the example pictured above we're displaying the Connection Status, Baptism and In Serving Team badges. You can choose which badges to display by editing the *Connection Request Board* block settings as shown below.

Connection Board Block Settings

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!

Also within the block settings you can use the *Lava Heading Template* and *Lava Badge Bar* to further customize the page. The *Lava Heading Template* will appear above the person's name, while the *Lava Badge Bar* will appear below the person's details and above the attributes section.

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` .

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.

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

In the example pictured below, a custom attribute has been added to request "Begin Date" information from the individual.
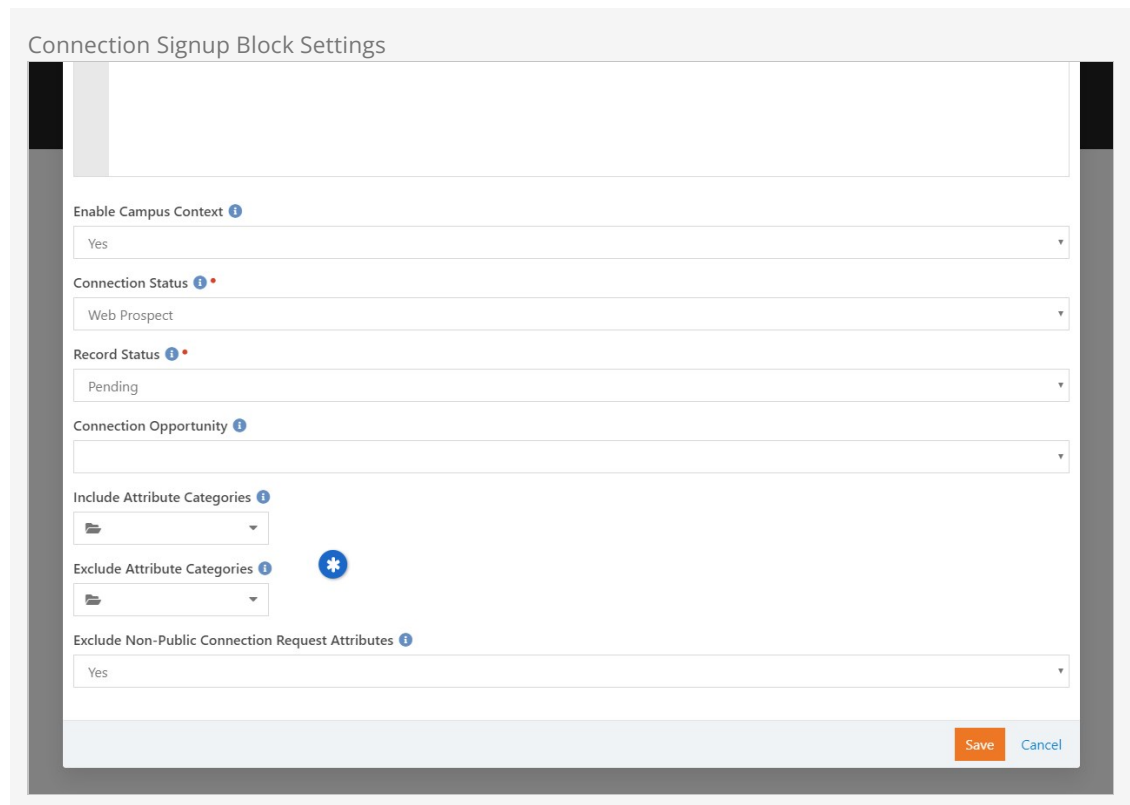
Connection Request Attributes

To set up attributes for the connection request, go to `Admin Tools > Settings > System > Entity Attributes`. Add an attribute with an *Entity Type* of "Connection Request". The attribute's configuration can be used by the signup block to control which attributes will appear. You have different options for controlling this.

You can select specific categories to include or exclude. To set up categories for this, navigate to `Admin Tools > Settings > General > Attribute Categories` and add a category with the *Entity Type* set to "Connection Request". That category can then be assigned to your connection request attributes, so they can be included or excluded in the signup block's settings.

You can also use the *Public* flag in the attribute's setup to control which attributes are shown. There's a simple setting on the signup block where you can blanketly exclude non-public connection request attributes. This can be used in place of, or in conjunction with, included or excluded categories.

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.

Connection Type Configuration

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 *Connections* page under `People > Connections`.

Connection Type List

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

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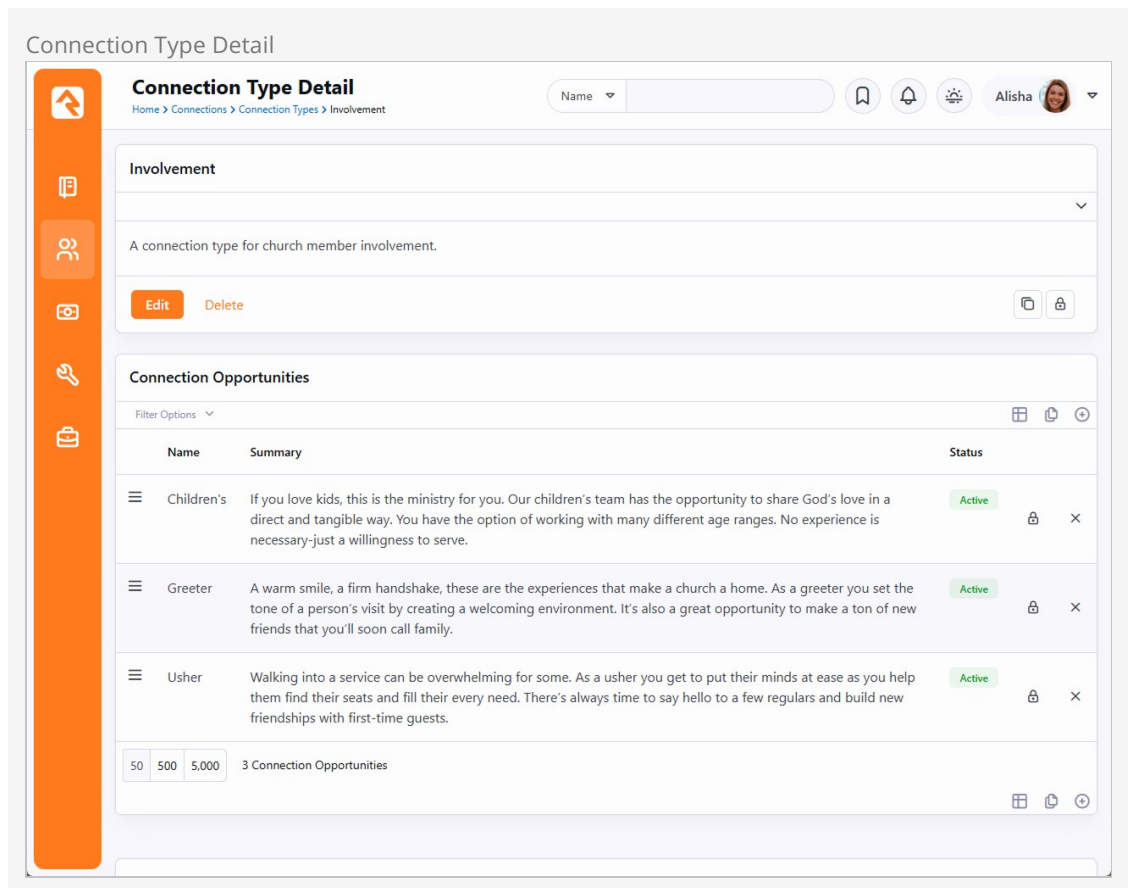
Let's start by looking at the configuration options available for a connection type.
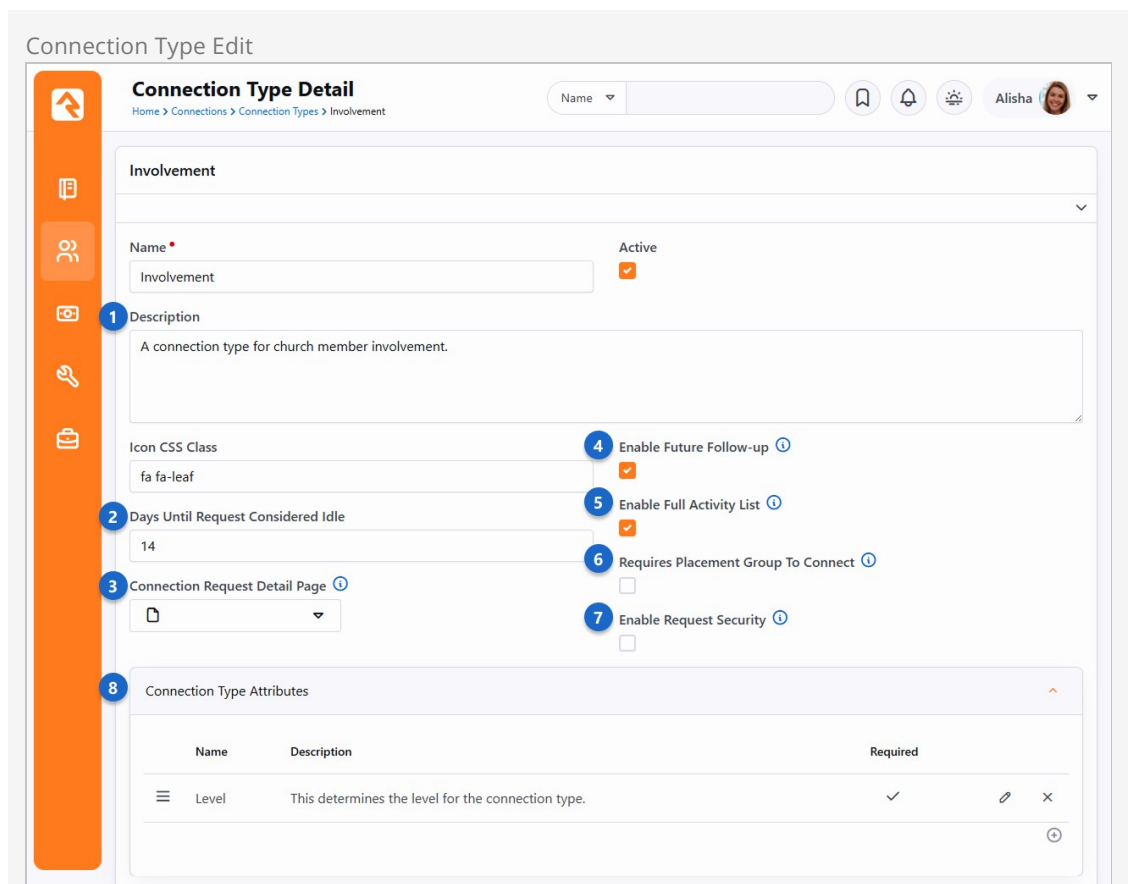
Connection Type Edit

9 **Connection Request Attributes** ⌃

Connection Request Attributes apply to all of the connection requests in every Opportunity of this type. Each connection request will have their own value for these attributes

Attribute	Description	Required

No Connection Request Attributes Found

⊕

10 **Opportunity Attributes** ⌃

	Attribute	Field Type	Allow Search		
☰	Preference Area	Single-Select	✓	✎	✕
☰	Days of the Week	Multi-Select	✓	✎	✕
☰	Role	Multi-Select	✓	✎	✕

⊕

11 **Activities** ⌃

Activities

Called	✎	✕
Called Left Message	✎	✕
Called No Answer	✎	✕
Contacted Waiting for Response	✎	✕

⊕

12 **Statuses** ⌃

	Name	Description	Is Default	Is Critical		
☰	No Contact		✓	✓	✎	✕
☰	Pending Background Check				✎	✕
☰	Pending Interview				✎	✕
☰	In Progress				✎	✕

⊕

13 **Workflows** ⌃

Workflow Type	Trigger		
Background Check	Manual	✎	✕
Photo Request	Request Started	✎	✕

⊕

14 **Save**   Cancel

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 Connection Requests are totaled.

③ Connection Request Detail Page

This setting only applies to older versions of Rock that aren't using the Connection Request Board block. You could use this to specify the page for viewing Connection Request Details for this Connection Type. As of Rock v12 this is no longer needed with the Connection Request Board because viewing Connection Request Details no longer takes you to a different page.

④ Enable Future Follow-up

We discussed the future follow-up feature previously. It allows a request to be frozen until a specific date, at which point a job will turn it back to Active and a "Future Follow-up Complete" action will be added to the request. You can decide whether this feature is available on each connection type you set up.

⑤ 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.

⑥ Requires Placement Group To Connect

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

⑦ Enable Request Security

If enabled, connection request blocks will have an additional setting allowing security to be applied to individual requests. A special rule is also applied, which automatically allows an assigned connector to view or edit their requests even if the connector doesn't have security to the connection opportunity or type. *Enabling this setting will noticeably impact performance when there are a significant number of requests.*

If you can't see requests that you should be able to see, be sure to check security at the connection's Request, Opportunity and Type levels.

⑧ Connection Type Attributes

Here, you add and manage attributes and attribute values that apply to this connection type. Remember, after you add a new attribute, save the connection type before entering its value. To create an attribute that's used for all connection types, use the entity attributes page without adding a Qualifier Field or Qualifier Value.

⑨ Connection Request Attributes

Attributes associated with a connection request will be displayed here. Connection request attributes apply to all of the connection requests in every opportunity of the given connection type.

⑩ 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 person using an opportunity search.

⑪ Activities

Each connection type allows you to define types of activities that a connector can make on a request. You can apply entity attributes to activity types, to track additional details related to that type of activity.

⑫ Statuses

You can create as many request statuses as you like for your requests. This is also where you'll configure rules to automate the process of moving individuals from one status to

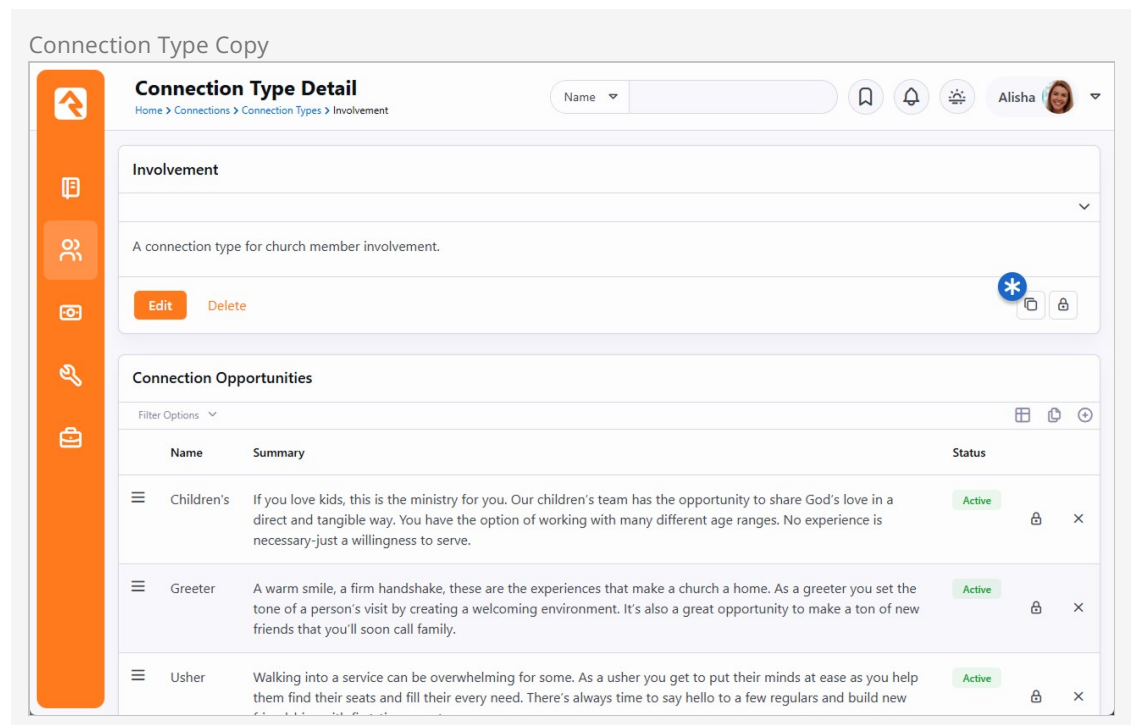another. See the Automating Status Changes section below for details.

13 **Workflows**

We'll go into all the details about connection request workflows below. For now, the important takeaway is that the workflows you define here will apply to all requests for all of the Connection Opportunities of this Connection Type. That's a wide net to cast, but sometimes that's exactly what you need. If not, you can also add workflows at the Opportunity level.

14 **Save**

Don't forget to save! Remember, some features (like adding values to new connection type attributes) require you to save before they can be used.

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

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 Detail* screen.

Automating Status Changes

As noted above, the Connection Type is where you define the *Statuses* that are available for connection requests. For instance, you might have statuses like "In Progress" or "Pending Interview" to track different stages as the connection request moves through your process. Statuses can be manually assigned by editing a request, but in many cases, you might find it's more efficient to automatically move a connection request from one status to another.

To set up rules for automating status changes, edit the Connection Type and access the Statuses section. By either updating a status or adding a new one, you can access the list of status automations. Click the ☐ icon to add a new automation, or the ☐ icon to edit an existing automation.

1. **Automation Name**
   Be sure to provide a descriptive name so you know what the automation does. This is especially helpful if you have several automations for a single status.

2. **Data View**
   This is where you select the data view that will identify which connection requests the automation should apply to. For instance, you might create a data view that returns connection requests where a specific Activity has been completed. Only data views with an "Applies To" setting of *Connection Request* will be listed here.

   For more information about building data views, see our `Taking Off With Reporting` guide.

3. **Group Requirements Filter**
   These options apply to connection requests that have a specified *Placement Group*. The group (and/or group type) requirements will be checked according to the following logic.
   - **Ignore:** If this is selected, any group requirements are not considered when deciding if the automation should be performed.
   - **Must Meet:** If this is selected, all group requirements must be met by the connection request's *Requestor* to perform the automation. If there are no group requirements for the connection request's *Placement Group*, then the automation will be performed.
   - **Does Not Meet:** If this is selected, the automation will be performed only if there are group requirements that the *Requestor* does not meet. If there are no group requirements for the *Placement Group*, then the automation will not be performed.

   For more information about group requirements, see our `Rock Your Groups` guide.

4. **Move To**
   This is the new status that the connection request will be updated to if it's returned by the selected data view and if the conditions of the *Group Requirements Filter* are met. In the example above, the connection requests returned by the data view would automatically be updated from a status of *No Contact* to a new status of *In Progress*.

The automations you configure will be performed after saving a connection request, or when the *Connection Requests Automation* job is run.

Keep in mind that the automations are performed in the order that they're listed. If you need to change the order, click the ▯icon and drag the automation to the desired location. Once an automation criterion is matched, no further automations will be processed for that status.

So, there is the Connection Type. Next let's look at creating and editing Connection Opportunities within this Connection Type.

Connection Opportunity Configuration

When viewing a Connection Type, you can select an existing opportunity or click the icon to add a new one. Either way you'll be brought to a screen like the one pictured below.

Connection Opportunity Detail

≡	Training End Date		🖉	✕
				⊕

⑨ Opportunity Attributes ⌃

Preference Area
◯ None   ⦿ Children's   ◯ First Impressions

Days of the Week

☐ Mon	☐ Wed	☐ Fri	☑ Sun
☐ Tue	☐ Thu	☑ Sat	

Role
☑ Upfront   ☐ Behind the Scenes

⑩ Placement Groups ⌃

Placement Group Configuration

Group Type	Group Member Role	Group Member Status	Use All Groups of This Type		
Serving Team	Member	Pending		🖉	✕
					⊕

⑪ Placement Groups

Name	Group Type	Campus	
Children's	Serving Team		✕
			⊕

⑫ Connector Groups ⌃

Group	Campus		**⑬ Main Campus Default Connector**
Global Connector Group	All 🖉 ✕		Trish Lowe ⌄
	⊕		

⑭ Workflows ⌃

Workflow Type	Trigger	
Background Check	Manual	
Photo Request	Request Started	
		⊕

⑮ Advanced Settings ⌃

Show Status On Transfer ⓘ   **Show Connect Button** ⓘ
☑   ☑
Show Campus On Transfer ⓘ
☐

[Save]   Cancel

① **Name**
This is where you'll set the name for the opportunity. This can be different or the same as

the *Public Name* described below.

② Active

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

③ Summary

Use this area to provide a brief summary that will display on the search results page.

④ Details

Use Details to give more information about the opportunity. For instance, you might describe the specific tasks a person might be performing in this role.

⑤ Public Name

This name will be used on the blocks that are displayed publicly.

⑥ Photo

Sometimes the best way to sell an opportunity is to show it in action. The right photo can go a long way toward making your site look even more professional and inviting.

⑦ Campuses

Because some opportunities might only exist at one campus and not others, you can specify which campus(es) the opportunity is for. This is disabled if you have only one campus.

⑧ Connection Request Attributes

Here you can see connection requests attributes that apply to requests in this opportunity. Attributes inherited from the Connection Type will also be shown here for reference.

⑨ Opportunity Attributes

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

⑩ Placement Group Configuration

The next few settings help to configure how the request will process adding people to groups when the person's 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 having to select every group of a certain type (and keep it current) just use all of them.

We'll talk more about these settings in the Placement Group Configuration chapter below.

⑪ Placement Groups

These are the groups that will be displayed as options to connect the requests to. The campuses defined on these groups are 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. This will not apply if you have only one campus.

⑫ Connector Groups

Next, we'll define the various groups that contain the people who will work the requests as they come in. The members of these groups are your Connectors.

⑬ Default Connector

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. This is disabled if you have only one campus.

⑭ 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. We'll talk more about connection request workflows below.

15 **Advanced Settings**

Use the Advanced Settings to change what buttons and fields are available when working with requests. Typically, you'll only want to hide these fields if you have automated processes (e.g., workflows) around your connection request processing. This allows you to prevent manual updates from interfering with those processes.

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 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 Opportunity* 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

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 Role
Next, we configure the one option for the *Leader* role and the two options for the *Member* role.

3 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*.

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 by enabling the *Use All Groups of This Type* option. 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. **Group Member Attributes**
   You'll also note that group member attributes are shown on this screen. In this case there's only one, the "Hours Serving" attribute. Showing the group member attributes here allows you to set these values quickly as you place the individual into the group.

Group Requirements
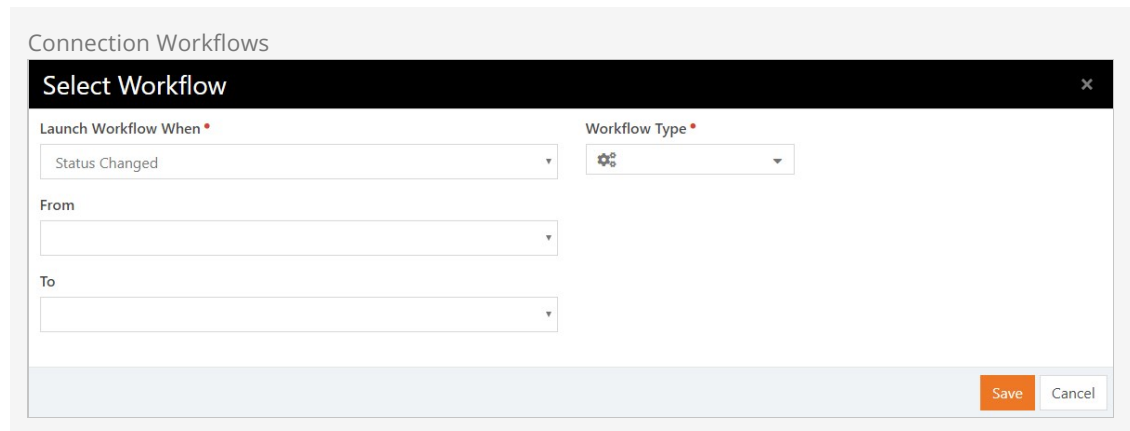
If a group has specific requirements to join, these will be checked before saving the placement group. If the person does not meet the requirements, you will see a warning message like the one pictured below.

Placement Group Requirements Not Met

Connection Request

Children's | Active | In Progress | ✕

Sarah does not currently meet the requirements for the selected group/role and will not be able to be placed..

Requester *
👤 Sarah Simmons ▽

Connector
⌄

State
◉ Active ○ Inactive
○ Future Follow Up

Comments

Status
○ No Contact ○ Pending Background Check ○ Pending Interview ◉ In Progress

Placement Group
Nursery (No Campus) ✕ ⌄

Campus
⌄

Orientation

Orientation Start Date
📅

Orientation End Date
📅

Training

Training End Date
📅

Training Start Date
📅

Hours Serving ⓘ
1

Save   Cancel

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 requests in all opportunities) or for a specific opportunity. In either case the configuration is the same.

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 Assigned:** The workflow will launch when a connector has been assigned to the request.
  - **Request Transferred:** The workflow will launch when the request has been transferred.
  - **Request Connected:** Fired when the request is marked as connected.
  - **Placement Group Assigned:** This workflow will be launched when a placement group is assigned.
  - **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. The entity passed to the workflow will be the connection request activity.
  - **Manual:** This workflow will be added to the request detail screen to allow the connector to manually execute it. You can optionally limit which workflows display on the request based on the status of the request.
  - **Future Follow-up Date Reached:** In this case, the workflow is launched by the *Connection Request Workflow Triggers* job. Depending on how the job is configured, the workflow will launch on or after the request's Future Follow-up date.
- **Workflow Type:** 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 *Attribute Set From Entity*. You can use the *Lava Template* field of this action to pull different properties of 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 Placement 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 'Activity Added' Workflow Trigger is a Bit Different
> While most of the workflow triggers send the Connection Request to the workflow, the 'Activity Added' trigger only sends the new Activity. So, if your workflow is triggered by 'Activity Added' then you will need an extra step to get the Connection Request associated with that activity. You can derive the Connection Request from the Activity by using 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 - Set by Guid

> ### Automatically Persist
> Be cautious when disabling auto-persistence for workflows manually triggered from a connection request, as it might lead to unexpected behavior.

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 nor 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 Comment Attribute** - An optional attribute that contains a comment that should be added to the request.
7. **Connection Request Attribute** - An optional connection request attribute to store the request that is created, for use later in the workflow.

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 with the 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 state 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. **Connection State** - The state to set the request to, if a Connection State Attribute is not provided.
4. **Follow Up Date Attribute** - The attribute that contains the follow-up date when state is being set to Future Follow Up.
5. **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 Person attribute that contains the person who is adding the activity.
5. **Connection Request Activity Attribute** - An optional connection request activity attribute that contains the created activity, for use later in the workflow.

See our `Blasting Off With Workflows` guide for more information on working with workflows.

Connection Campaigns

A connection campaign is a way to generate a set of connection requests in bulk for a special purpose. The goal of this feature is to provide a simple way to create connection campaigns that allow for the contacting of many individuals. It links several of Rock's most-loved features to work together to achieve this. Connection campaigns have been designed to work as a one-time connection or a reoccurring connection. Keep that in mind as you read through the rest of this chapter.

Setting Up Connection Campaigns

Before diving into the details, let's take a high-level tour of how a connection campaign works. The diagram pictured below shows the flow of a campaign.

Connection Campaign Flow
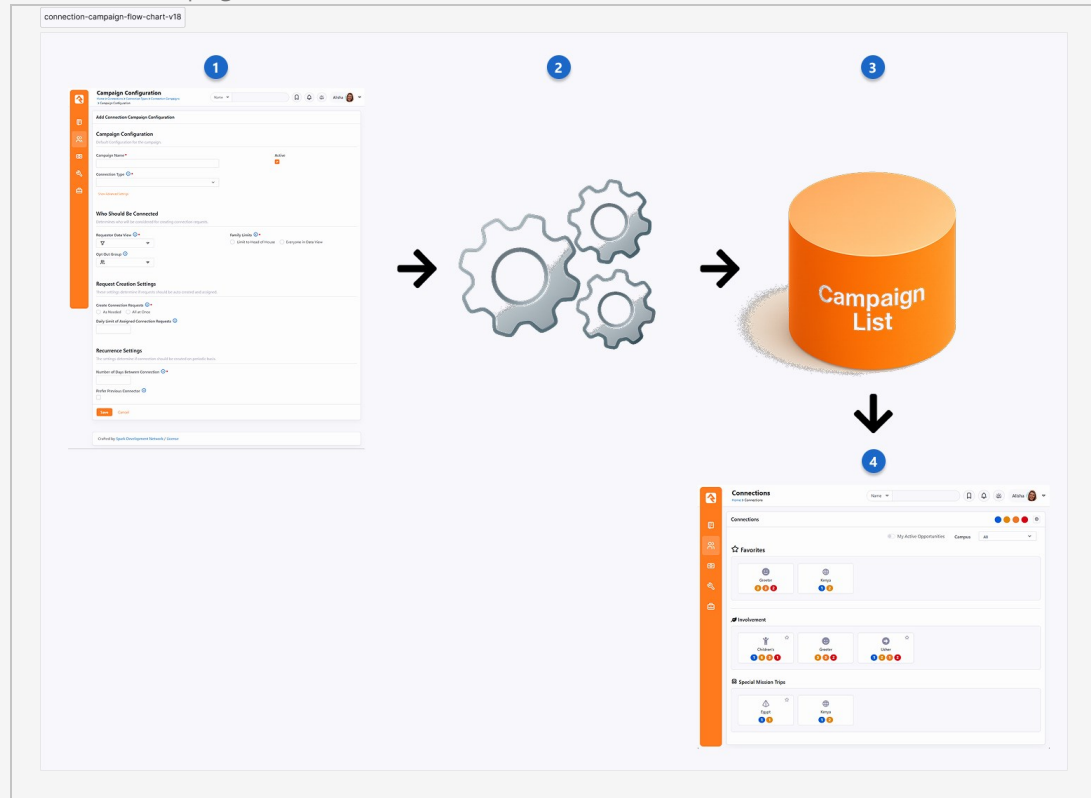
1. **Campaign Settings**
   We start by configuring our campaign. This includes defining:
   a. The connection opportunity to link to
   b. Who should be contacted by the campaign (think data view)
   c. How to assign connectors
   d. Whether people should be contacted on a continued basis

   Obviously, there is a lot more detail to cover, but we'll get to that in a minute.

2. **Campaign Job**
   A job has been configured to process the setup above and create a list of people who should be added to the campaign.

3. **Campaign List**
   This list can change over time (based on the dynamic filters of your data view and who has already been processed). While it's not important to know where this list resides, it is stored as an EntitySet for those who are curious about the technical nature of the feature.

4. **Connections**
   From the campaign list, connection requests are created.

Because the process ends with the creation of a connection request you may wonder, "Why not just create the connection request directly?" The answer is that we realize it may take days or weeks to process through the list. We don't want the age of the connection requests to be skewed by the date the request was created, especially if it takes several days or weeks for a connector to be assigned. It might be perfectly reasonable for a request to be waiting for someone for several days. We want to be able to measure requests by age as a reflection of how efficiently connectors are working requests. This provides good accountability to the process.

Now that we've looked at the feature from a 30,000-foot view, let's dive into each component in detail.

We'll start with the *Connection Campaigns* page. This allows us to define as many campaigns as we'd like. You can find this list under `People > Connections > Connections Configuration > Connection Campaigns` .

Connection Campaign List

As you can see, this lists the campaigns and provides a few metrics about each. These include:

- **Active Requests:** This is the number of active connection requests that are currently open.
- **Pending Connections:** This is the number of people still on the campaign list waiting to be moved to a connection request.

Selecting a campaign will take you to the *Campaign Detail* page.

Campaign Detail Page

This page is the control center for a campaign's configuration. Below we'll walk through each section of the setup.

Connection Campaign Settings

Campaign Configuration

Campaign Configuration
Default Configuration for the campaign.

① Campaign Name *
Seniors Connection Campaign

② Active ☑

③ Connection Type ⓘ *
Contact Campaign

Connection Opportunity *
Seniors Calling Campaign

Hide Advanced Settings

⑪ Request Comments Lava Template ⓘ

Who Should Be Connected
Determines who will be considered for creating connection requests.

④ Requestor Data View ⓘ *
▽ Adult Member ...   ✕ ▽

⑤ Family Limits ⓘ *
○ Limit to Head of House   ⦿ Everyone in Data View

⑥ Opt Out Group ⓘ
👥 A/V Team   ✕ ▽

Request Creation Settings
These settings determine if requests should be auto created and assigned.

⑦ Create Connection Requests ⓘ *
⦿ As Needed   ○ All at Once

⑧ Daily Limit of Assigned Connection Requests ⓘ
10

Recurrence Settings
The settings determine if connection should be created on periodic basis.

⑨ Number of Days Between Connection ⓘ *
90

⑩ Prefer Previous Connector ⓘ
☑

Save   Cancel

Crafted by Spark Development Network / License

---

① Campaign Name
The name of the campaign should make it easy to identify its purpose.

② Active
Set whether the campaign is currently active or not.

③ Connection Type/Opportunity
This is where you'll choose which connection type and opportunity the requests will be

created in.

4 **Requestor Data View**

This is the data view that will be used to populate the campaign list.

5 **Family Limits**

It's often the case that you'll want to connect with just one person in the family. While you can attempt to configure your data view to handle this for you, we've made it easy to set this up. By checking "Limit to Head of Household" you can have your data view return as many people as you'd like, but only one connection per family will be made. The head of household will be used as the requestor for the entire family. This is also very helpful if your data view contains children, but you really want to reach out to the parents.

6 **Opt Out Group**

This setting will remove any group members of the selected group from the campaign list. While you could also add this to your data view, we've provided an easy out with this setting. Note that all families that the group member is a part of will be opted out of future connections.

7 **Create Connection Requests**

This setting helps determine when connection requests are created. You have the option of having them all created as soon as the job runs, or as they are needed. Selecting *As Needed* means requests will be created as there are people ready for them. Doing it this way allows for better accountability because the creation date tells you how long the request has been worked instead of how long it sat before someone did work it.

8 **Daily Limit of Assigned Connection Requests**

The number you provide here tells the Campaign Manager job the maximum number of connection requests that should be automatically created and assigned for each connector on a daily basis, provided there are any to create. This limit applies to everyone by default, but you can change the limit manually for individual connectors if needed. More on that in the What to Know About Connectors section. Keep in mind a value of 0 or blank will stop the job from creating and assigning any connection requests. In that case, all connection requests must be made manually on demand. Be careful when combining this with the "All at Once" setting, because you could create many requests that will never be assigned.

9 **Number of Days Between Connection**

This setting allows connection requests to be created on a routine basis for an individual (or family). Say you wanted to make a connection every 30 days with an individual. Set this value to "30" and thirty days after the original connection has been closed (status of *Inactive* or *Connected*) a new one will be created.

10 **Prefer Previous Connector**

This setting attempts to use the same connector for future requests. The key word here is 'prefer'. If the original connector is not available or is over their daily limit, then the system will select a different connector.

11 **Request Comments Lava Template (Advanced Settings)**

This allows you to create customized "Comments" using a `Lava` template. The *Person* object and *Family* (group) object will be merged with this template prior to creating new connection requests. Example:

```
Please contact {{ Person.NickName }} with a quick phone call.
Here are the family members:
{% for m in Family.Members %}
* {{ m.Person.FullName }} - {{ m.GroupRole.Name }}
({{ m.Person.ConnectionStatusValue.Value }}, {{ m.Person.RecordStatusValue.Value }})
{% endfor %}
```

Working with Connection Requests

There's nothing special about working with the connection requests. A button at the top of the connections pages allows a person to create more requests from the campaign list for themselves.

Add Campaign Requests

Pressing this button will activate a modal to ask how many requests the individual would like to create.

Get Additional Requests

> **Note**
>
> When creating new requests, the person will be assigned first to any current connection requests that do not have a connector assigned. If all requests already have connectors, then new requests will be made from the Campaign List.

What to Know About Connectors

Connector Group Campus

When the system automatically marks people as connectors, it respects the connector group settings with respect to campus. Individuals in a connector group for all campuses will be available for any new request. Those in a group for a specific campus will only be available for requests that are marked for that campus (determined by the requestor's primary campus).

Connector Override Settings

When configured for auto assignments, connectors can have a specified number of requests assigned to them per day. The global setting is configured for the specified campaign. This can be overridden however using group member attributes on the connector groups. The keys for these attributes are required to be:

- **CampaignDailyLimit (Integer):** The number of requests that the individual should be assigned per day.
- **CampaignScheduleDays (Days of Week):** The days that the individual should be assigned requests.

Sample Recipes

Below are a couple of sample recipes to help you understand connection campaigns in more detail.

Reoccurring Seniors Check-in

Say you'd like to make a calling campaign to check-in with seniors every two weeks. Below are the high-level steps you'd need to set this up.

1. Create a new Connection Type and Connection Opportunity for this new activity.
2. Add a Connection Group to the Connection Opportunity with the people who will be making the calls.
3. Create a data view with the seniors you'd like to call. This can be something like those over 65, or perhaps members of a group that a workflow from your website adds people to who have

requested check-ins.

4. Create the Connection Campaign with the following settings:
   a. Choose the connection opportunity from step 1.
   b. Select the data view from step 3.
   c. Set "Family Limits" to "Everyone in the Data View".
   d. Set "Create Connection Requests" to "As Needed" with a "Daily Limit of Assigned Connection Requests" to 10 (meaning each connector will get 10 calls a day).
   e. Set the "Number of Days Between Connection" to 14. This will create a new request 14 days after the last request is closed.
   f. Set "Prefer Previous Connector" to true, because who doesn't like to hear from the same person each time?

A new connection request will be created for each check-in. This helps provide good accountability to how quickly calls are made. Keep in mind that the connections features will show all activity for a person across all their requests. This helps you see previous notes. It's a win-win!

> ### Bonus Points
> Create a manual workflow to remove the person from the group that the data view uses to create the campaign list. This allows a volunteer to simply click a button if a senior decides that check-ins are no longer required.

Large Emergency Call List

Say there has been a local emergency and you need to make calls to reach out to numerous people in a specified area. One way to achieve this would be to follow the steps below.

1. Create a new Connection Type and Connection Opportunity for this new activity.
2. Add a Connection Group to the Connection Opportunity with the people who will be making the calls.
3. Create a data view with the individuals who need to be reached.
4. Create the Connection Campaign with the following settings:
   a. Select the connect opportunity from step 1.
   b. Select the data view from step 3.
   c. Select "Family Limits" to "Limit to Head of Household" (each home only needs one call).
   d. Set "Create Connection Requests" to "As Needed" and a "Daily Limit of Assigned Connection Requests" to 0. This will allow people to get calls in batches to fill the amount of time they have to make calls.

> ### Note
> You could also use the setting to create all the requests at once. The only trick to this strategy is that it's possible that two individuals could assign themselves to the same request at nearly the same time. This could create duplicate calls. In an emergency no one has time to duplicate calls.

First Steps for Steps

Whether it's getting kids to bed at night or getting ready for work in the morning, many areas of our lives require a series of tasks intended to achieve a single goal. Spiritual growth is no exception. With Rock's help, you can guide your attendees through customized steps along the path of spiritual development.

But before we dive too deeply into Steps, let's take a moment to define a few terms and introduce you to some key features you'll need to know.

A *Step Program* is made up of individual activities and accomplishments called *Step Types*. If the goal is to reach the mountain's summit, then the Step Program is the mountain, and the Step Types are the basecamps on the way to the top. Let's cover some more fundamentals for understanding *Steps*.

Anatomy of Steps

Understanding how *Steps* are structured helps you create meaningful pathways for growth. Each part of the *Step Type Step Program* setup plays a unique role in guiding people through their journey while keeping your data consistent and useful.

Core Steps

Core Steps form the foundation of your organization's process. They provide consistent information for reporting and analytics across *Rock*. Without them, it would be difficult to understand engagement or measure progress.

Think of *Core Steps* as essential milestones like *Baptism*, *Small Group*, *Serve*, and *eRA*. These built-in *Steps* can't be deleted because they support long-term accuracy in reporting and future feature development.

When *Step* data stays consistent, you gain a clearer view of how people are engaging, where they need encouragement, and how to guide them toward their next step. *Core Steps* aren't only for tracking progress, they help people see what's next, build momentum and stay engaged in their journey.

If needed, you can move a *Core Step* to another *Program* using the button in the *Step Type* settings.

Organizational Objectives

Organizational Objectives define the intent behind each *Step*. They ensure that *Steps* across your organization align with shared goals such as *Outreach*, *Discipleship*, or *Activation*. While you can rename objectives to better match your language, keeping their purpose consistent helps maintain accurate reporting and helps the core team develop features and reports based on objectives.

You can add new objectives as needed, but avoid creating too many. This keeps your data manageable and meaningful. Existing objectives cannot be deleted to preserve reporting integrity.

Engagement Type

Engagement Type determines whether a *Step* is a *Milestone* or an ongoing *Rhythm*. *Milestones* mark major moments like *Baptism*, while *Rhythms* track continuous activities such as *Small Group* participation.

If the *Engagement Type* is set to *Rhythm*, a person's *Status* on the *Step Type* page won't change automatically. *Completed* means the rhythm has stopped, while *In Progress* indicates that it's active.

Impact Weight

Impact Weight measures how significant a *Step* is in a person's overall journey. Higher values represent greater influence, allowing your organization to prioritize what matters most. You can configure this value in the *Step Type* settings.

Prerequisites and Completion Flow

Prerequisites define which *Steps* must be completed before starting another. They ensure a logical order in how people move through your process.

Completion Flow controls how participants progress through *Steps* within a program:

- **Linear (Required)**: *Steps* must be completed in order. Custom prerequisites are removed.
- **Linear (Preferred)**: *Steps* are ideally completed in order, but prerequisites are still enforced.
- **Non-Linear**: *Step* order is for display only, and prerequisites remain active.

Together, these settings help create a structured, data-driven experience that supports both personal growth and organizational insight.

Let's explore these concepts further by looking at the program for Discipleship, which is available right out of the box. Once you understand this program, you'll be able to change it or create an entirely new program to measure anything from your students' spiritual growth to your volunteers' progress through training programs, and more.

Steps

You can access your step programs under: `People > Engagement > Steps.` This is also where you'll go to create new programs, which we'll cover later in the Editing Step Programs section.

Steps Page

1 **Name**
The name of the step program.

2 **Category**
Categories are a great way to group and organize your programs. You can view and manage step program categories from `Admin Tools > Settings > System > Category Manager` using the *Step Program* entity type.

3 **Step Types**
A count of all step types, either active or inactive, included in the program.

4 **Steps Taken**
A count of all completed steps for all individuals in the program.

Step Program

The *Step Program* page has a detail block at the top and a list block below. There's actually a lot to see and do on this page, so for now we'll just get familiar with the page itself before diving into the setup and maintenance in later sections.

Let's take it from the top and look at the detail block first.

Step Program Detail

1. **Campus**
   You can select a campus to only show step information from that campus. The step metrics, chart and step type information (see below) will all be updated to show data only from the selected campus.

2. **Description**
   A good description helps clarify the program's purpose.

3. **Category**
   The category assigned to the program is displayed for reference.

4. **Step Program Metrics**
   These metrics provide good information on the overall program. The values include:
   - **Individuals Completing:** This is a count of unique individuals who have completed the program. People who complete the program multiple times will only be counted once.
   - **Average Days to Complete:** The average number of days to complete the program is calculated based on the earliest Start Date and the latest End Date across the steps in the program.
   - **Steps Started:** A count of the number of steps that have been started, regardless of whether they were completed.
   - **Steps Completed:** This is a count of all completed steps in the program.

5. **Step Program Activity Chart**
   This is a stacked area chart (a chart where areas don't overlap because they are cumulative at each point) showing completed steps by step type. This chart actually has a lot going on, so we'll wait to break it all down for you later in the Steps Charts chapter.

Next, let's move down to the list block at the bottom of the page. Here you can see and maintain the step types included in your program.

1 Name
The step type names are each listed here.

2 Engagement Type
Notes whether the step is a *Milestone* or an ongoing *Rhythm*. This is configured in the *Step Type* settings.

3 Objective
Describes the main focus of the step and how it supports the organization's mission. This is configured in the *Step Type* settings.

4 Impact Weight
Represents the significance of this step in a person's journey. A higher value indicates greater impact, helping to measure progress at an organizational level. This is configured in the *Step Type* settings.

5 Started
Shows a count of how many times the step type has been started.

6 Completed
Shows a count of how many times the step type has been completed.

7 Bulk Entry
The ☐ icon will take you to the *Bulk Entry* page, where you can add steps of that type in bulk. We'll cover how to do that below.

> ### Not Adding Up?
> You'll sometimes notice that the counts for Started or Completed steps are higher than the number of people in your program. If you're doing any analysis with these numbers, it's important to keep in mind that a single person can be counted more than once if the step allows multiple completions.

In the Editing Step Types section we'll dive deeper into how the information in this block gets added and maintained.

Step Types

Next, let's shift our focus to one of the individual step types within our example program.

The layout of the *Step Type* page is very similar to the *Step Program* page. You'll see a familiar detail block at the top, followed by a list of step participants below. From here you can maintain the list of participants and view their progress as they start and finish the step.

Step Type Page

1 Name and Description

The name of the step type is shown at the top of the page for reference. A description for

the step type adds context and meaning.

2 **Step Type Metrics**
These are the same metrics as discussed in the prior section but showing only data for the individual step type being viewed.

3 **Steps Activity Chart**
This overlapping area chart shows when the step type has been started and/or completed. We'll unpack all the pieces of this chart later, in the Steps Charts chapter.

4 **Step Type Move**
Move a Step Type from this program to another. For more, see Step Type Moves

5 **Step Participants**
All individuals who have started and/or completed the step type are listed here.

6 **Date Started**
This is when the individual started the step. This column only appears if the step type is configured to span time.

7 **Date Completed**
This is when the individual completed the step. If the step type doesn't span time, then this is the "Date" associated with the step (see Step Entry).

8 **Status**
The status for each person is displayed, using values configured at the program level (see Editing Step Programs).

9 **Campus**
See which campus this step occurred at.

10 **Attribute**
Any step attributes you create with the "Show in Grid" option selected will be displayed here. In this example we've added an attribute to show which pastor is related to the step.

In the Editing Step Types section we'll dive deeper into how all of this gets set up and maintained. At this point it's just important to be familiar with the kinds of data shown on this page.

Step Type Move

You may have heard a wise person in your life say, "Where you start doesn't determine where you finish." This is true for many things, including *Step Types*. If you select the button from a *Step Type*, you can move it to another program.

Step Type Move
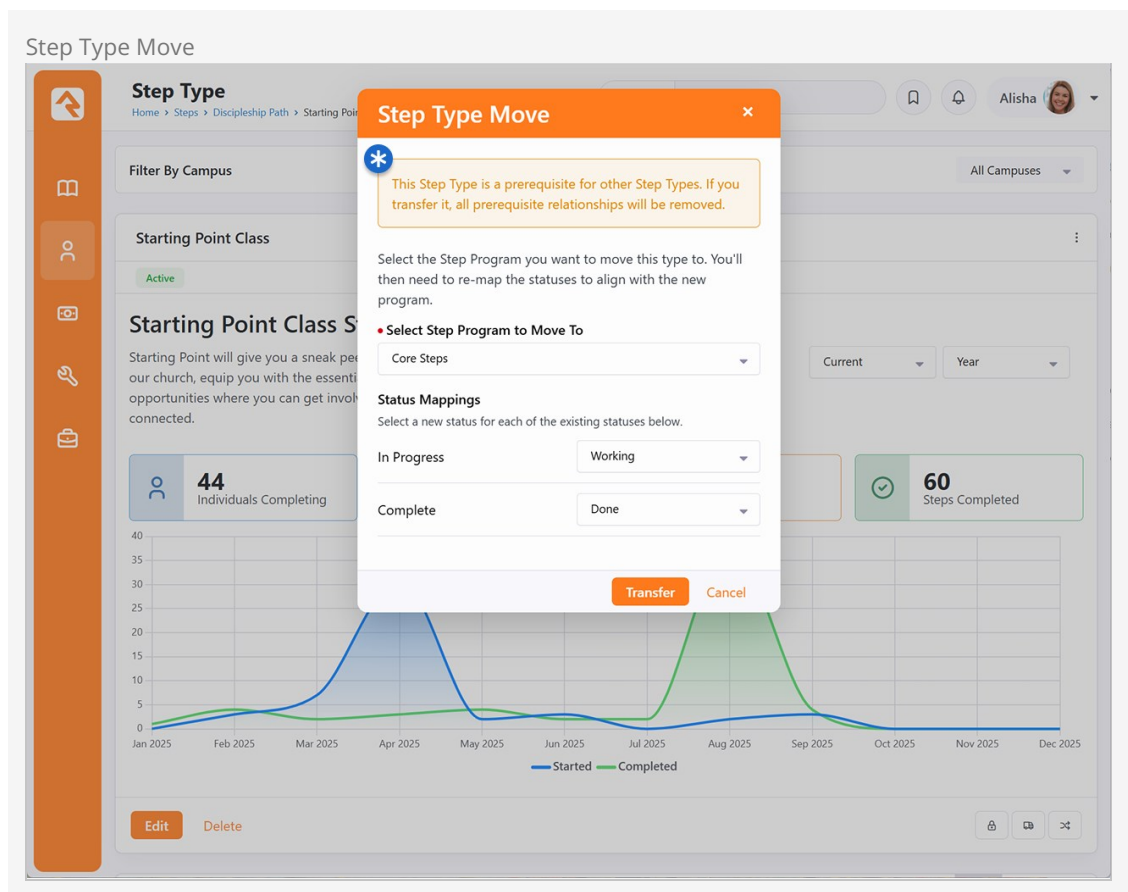
When you press , it will ask you to select a *Step Program* to move to, then re-map statuses. It is important that the *status* you map to has a similar purpose as its current one. If not, you may end up considering all people who just started a *step* as far along as those who completed it years ago. Pressing `Transfer` is the final step, and it will redirect you to the *Step Type* page in the new *Program*.

> ### Warning for Step Type Moves
>
> Notice the warning for this move, any *Step Type* with *prerequisites* will lose them, meaning in the program it leaves, some people will become eligible to complete new *steps*, and in the program its heading to, new *prerequisites* will need to be set up.
>
> Additionally, *Step Attributes* don't follow when you move a *Step Type*, you must reconfigure them. All other *step data* does follow though.

Historical Program Completions

Historical program completions stay tied to their original program. They don't move when a *Step Type* is transferred.

This preserves the integrity of historical data, giving you an accurate picture of how people completed programs as they originally existed, not as they are today.

Examples:

1. If you add a new *Step Type* to a program, people who already completed that program keep their completion record.
2. If you move a *Step Type* to a new program, *Program Completions* for either program remain unchanged.

Step Entry

Shepherding individuals through your program can be done either from the *Step Types* page or from the *Person Profile* page (which we'll examine in the next section). Whichever path you take, you'll wind up at a *Step Entry* page like the one pictured below. This is where you'll maintain step type information for an individual.

Step Entry Page

1 **Person**

In this example we're adding a step from within the *Steps* area, so we need to provide a person. Steps entered from the *Person Profile* page will automatically populate the person's name.

2 **Campus**

If you have multiple campuses configured, you can optionally associate the step with a particular campus.

3 **Start Date/End Date/Date**

- **Spans Time:** If the step spans time then *Start Date* and *End Date* fields will be available. Use these fields to track the dates on which a person has started or finished a particular step. These are displayed as the "Date Started" and "Date Completed" fields on the *Step Types* page.
- **Does Not Span Time:** If the step doesn't span time, then you'll see only a single *Date* field. In this case the date is treated as an end date and will be displayed as the "Date Completed" on the *Step Types* page.

4 **Status**

Here you can update the individual's status for the step. We'll show you how to maintain the list of statuses when we talk about Editing Step Programs in the next section.

5 **Step Note**

Here you can add a Step Note to the step, to track details or record items for future reference.

6 **Step Attributes**

Any attributes applicable to the step will appear here. We'll cover how to set up step attributes below.

When you add or change a step for a person, a history of those changes can be viewed on the *Person*

Profile page under the History tab in the *Person History* section.

While the *Step Entry* page is used for manually maintaining step information for individuals, there are automated alternatives. Steps can be updated from Streak Achievements or as part of a `Workflow`.

Bulk Entry

Sometimes you just need to update a little data. Other times, you need to update a lot. When you're updating a lot, Rock's bulk update tools for steps are here to help. Instead of making the same change one person at a time, you can apply updates to large groups in a single action.

There are two ways to bulk update Steps:

- Use the ☐ icon from the top or bottom of a list grid. Just select the individuals you want to update, then click the icon to launch the *Bulk Update* screen.
- Or, use the ☐ icon from the *Step Program* or *Step Type* pages to enter bulk entry mode.

Bulk Entry from Grid

Bulk Entry From Step Program/Step Type Page

In our Discipleship example we can use the "Pastor" attribute to record which pastor performed the baptisms. This is great if large groups are baptized by different pastors because you only have to select a pastor once for any number of individuals. We'll cover how to set up attributes like this in the next chapter below.

> ## Show on Bulk
> If the *Show on Bulk* option is not enabled for the attribute, then the attribute will still appear in bulk entry, but it will need to be set for each person individually.

Next Steps for Steps

Now that we're more familiar with the concepts of step types, step programs and step entry, we're ready to see how it all gets maintained. We'll start at the program level, and then move on to setting up individual step types.

Editing Step Programs

Let's go back to the *Step Program* page to see how we can edit our programs. Clicking the `Edit` button lets you update the program and its configurable settings.

Edit Step Program

① **Name**
Provide the name of the program.

2 **Active**

Set the program to active or inactive.

3 **Description**

Add a meaningful description of the program.

4 **Icon CSS Class**

Choose the *CSS icon* to use for the program.

5 **Category**

Categories help to group your related programs. You can view and manage *step program* categories from `Admin Tools > Settings > System > Category Manager` using the *Step Program* entity type.

6 **Completion Flow**

Defines how participants progress through the steps in a program.

   a. **Linear (Required)**: *Steps* must be completed in order no matter what; custom prerequisites will be removed.
   b. **Linear (Preferred)**: *Step* ordering is preferred but not required, and prerequisites are enforced.
   c. **Non-Linear**: Ordering is for display purposes only; prerequisites are enforced.

7 **Statuses**

This is where you'll set the different statuses, like 'In Progress' or 'Complete' for the program. We'll discuss this area in detail below.

8 **Step Type Attributes**

This is where you can create attributes that will be applied to each *Step Type* associated with this *Program*. These can be seen and edited when editing the Step Type.

9 **Step Program Entity Attributes**

Displays *Entity Attributes* labeled *Step Program* if any are configured. More on this below

10 **Workflows**

Workflows and *Step Programs* are a powerful combination. We'll go into details on the options available to you below.

Default List View

Steps information for an individual can be viewed under the Steps tab on the person profile, either as cards or in a grid. You can toggle between these views from within the person profile using the ☐ and ☐ buttons. As noted in the prior section, the default view is set at the step program level.

Cards View

The screenshots above (cards) and below (grid) are both for the same person following the Discipleship program.

Grid View

While in card view, hovering over a card lets you view additional details as well as access the *Step Entry* page. This is controlled by the Step Type Advanced Settings (see Editing Step Types).

> **Step Security**
>
> A person needs to be in a role with Edit permission for the Steps block in order to add steps from the *Person Profile* page.

Card View Hover
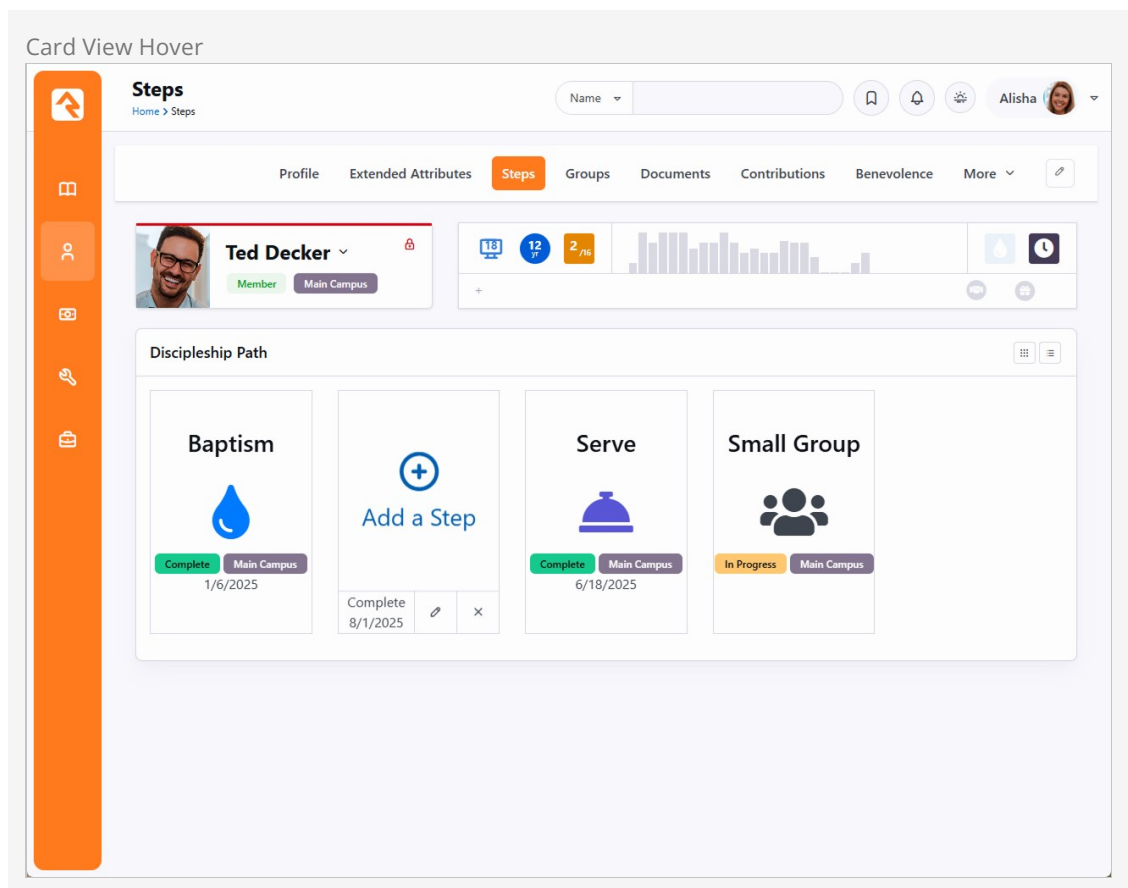
Cards or Grid?

The cards view will condense multiple occurrences of a step into a single card, whereas the grid view will display a row for every occurrence of the step. For this reason, the grid view may be more appropriate for step programs that allow steps to be repeated often. The grid view also displays a "Summary" column that shows step attributes configured to show on grids.

If you have multiple campuses, you can choose to show or hide the campus associated with a step by changing this block's settings. This applies to both the cards and grid views.

The default view doesn't have to be the same for all of your programs. Choose the one that seems best for each individual program. You can always change it later if you need to.

Statuses

The values you set up here are used to track an individual's status for any step type in the program. This list shows each status and whether it is treated as Completing the step.
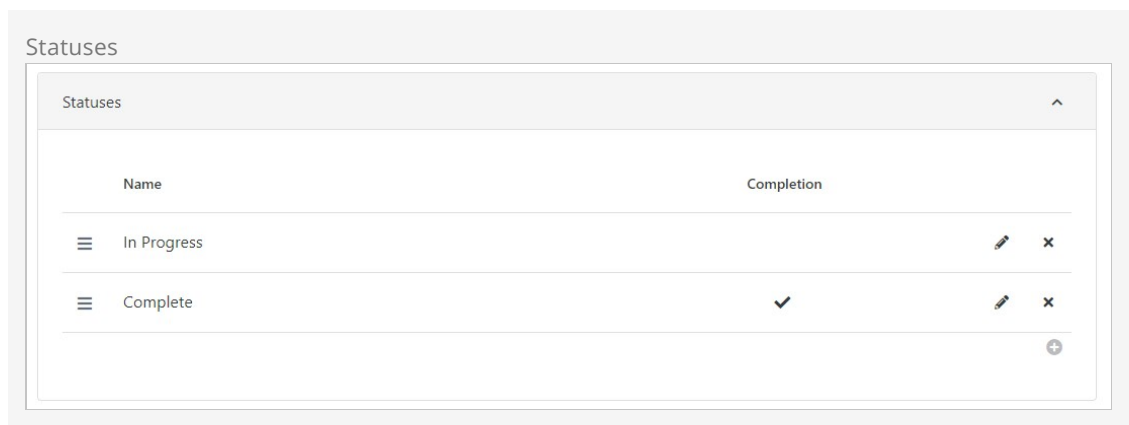
Statuses

The *Create Status* page is used when adding or changing a status.

Create/Edit Status
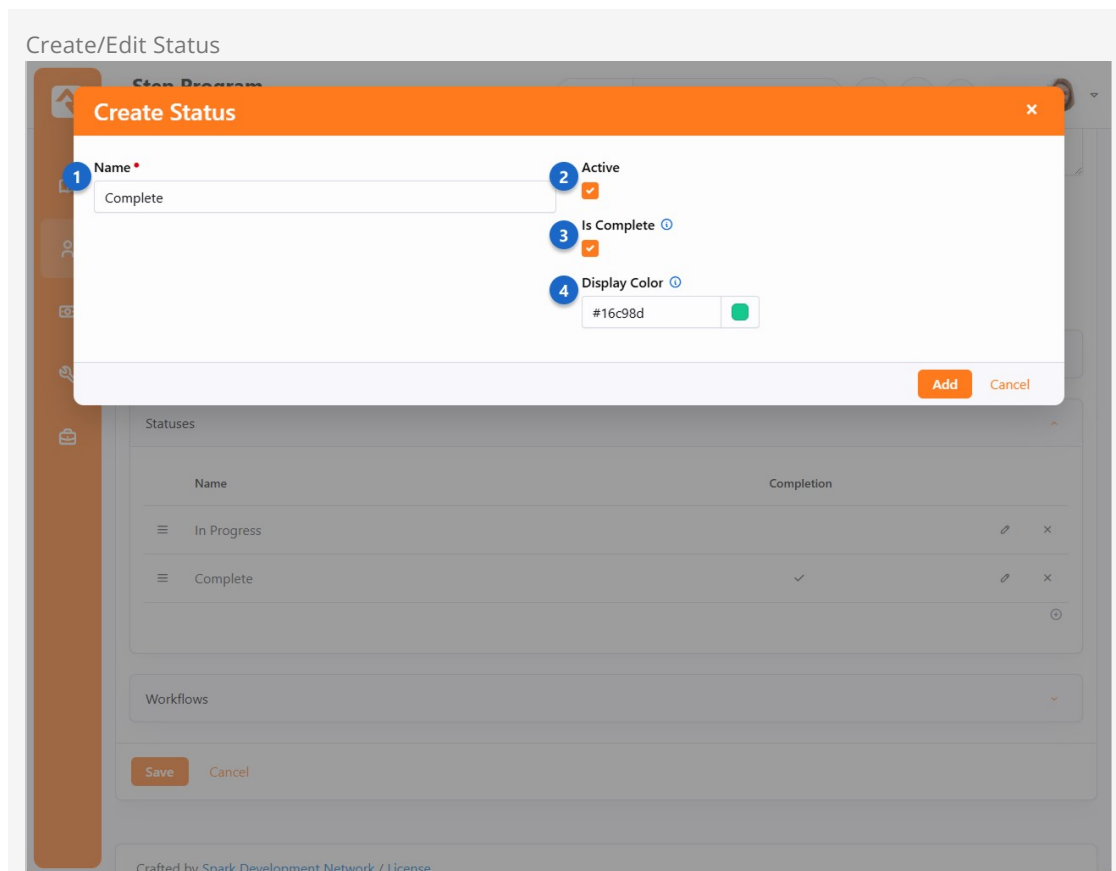
1. **Name**
   Add the name of the status (e.g., In Progress).

2. **Is Active**
   Set the status to active or inactive.

3. **Is Complete**
   Select this option only if the status means the entire step has been completed.

4. **Display Color**
   Select the display color for the status.

> ### Completed But Not Completed
> In the Step Entry section we discussed the "Date Completed" field. It's important to note that this date, by itself, is not enough to indicate that the person has finished a step. For a person to truly complete a step, an "Is Complete" status and a completion date should both be present.

Entity Attributes

If you have an *Entity Attribute* configured for *Step Programs*, it will appear in the settings here.

Entity Attributes Screenshot

Using *Entity Attributes* for *Step Programs* lets you apply attributes across all programs. In this example, *Internal Program* is a *Boolean* that can be selected for any *Step Program*. This works well for attributes you need system-wide.

To add a new attribute for this program, go to `Admin Tools > Settings > Entity Attributes` and select *Step Program* as the *Entity Type*.

Workflows

Here you can add one or more workflows to the program. Keep in mind that workflows added to the program apply to all the steps in program, regardless of the step type.

Step Program Workflow
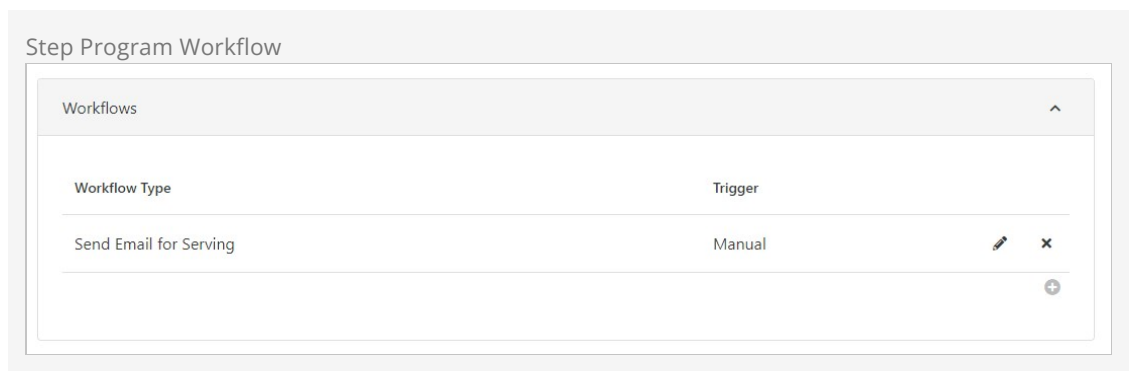
The workflow can be launched according to one of three triggers:

Workflow Triggers
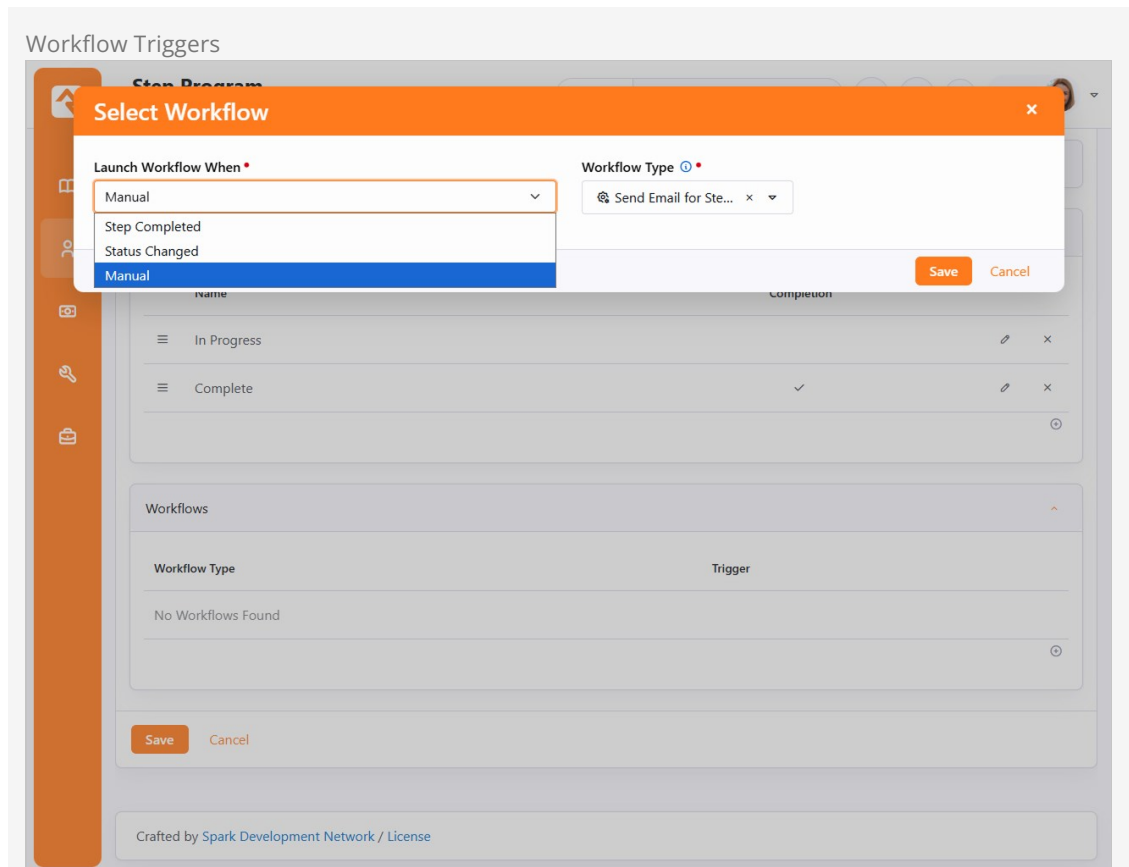
- **Step Completed:** The workflow is launched when the step is assigned any "Is Complete" status (see Editing Step Programs).
- **Status Changed:** The workflow is launched either when there is any status change, or according to specific status changes you define.
- **Manual:** The workflow is launched by a manual click of a button.

See our `Blasting Off With Workflows` guide for more information on creating workflows.

Editing Step Types

From the *Step Type* page click the `Edit` button to change the step type settings.

Edit Step Type

Name ⌄

Alisha ⌄

Baptism

⋮

1 • Name

Baptism

2 Active
☑

3 Description

An act of obedience symbolizing the believer's faith in a crucified, buried, and risen Savior, the believer's death to sin, the burial of the old life, and the resurrection to walk in newness of life in Christ Jesus. It is a testimony to the believer's faith in the final resurrection of the dead.

4 Highlight Color ⓘ

#007aff 🟦

5 Icon

💧 ▾

6 ☐ Show Count on Badge ⓘ

⚙ **General Settings** ⌃

Step Configuration

Define the type and purpose of this step, and specify if any other steps must be completed first.

7 Engagement Type ⓘ
- ◯ None
- ◉ Milestone
- ◯ Rhythm

8 Organizational Objective ⓘ
- ◯ None
- ◯ Outreach
- ◯ Discipleship
- ◉ Activation

9 Impact Weight ⓘ

5 - High Impact ▾

10 Prerequisite Steps ⓘ
- ☐ Starting Point Class
- ☐ Serve
- ☐ Small Group

11 Completion Options

Set options to control how this step can be recorded, tracked, or completed.

- ☐ Allow Multiple ⓘ
- ☐ Spans Time ⓘ
- ☑ Is Date Required ⓘ

12 Call To Action Path

Configure these settings to guide individuals on how to complete this step. Helpful when designing and building your website or mobile app.

Call To Action Label ⓘ

Get Baptized

Call To Action Link ⓘ

https://rock.rocksolidchurchdemo.com/baptism

Call To Action Description ⓘ

When you feel ready, sign up to get baptized!

🗄 **Step Attributes** ⌄

⌥ **Workflows** ⌄

⚙ **Advanced Settings** ⌄

Save   Cancel

Crafted by Spark Development Network / License

1 **Name**

Provide the name of the step type.

2 **Active**

Set the step type to active or inactive.

3 **Description**

Provide a description for the step type.

4 **Highlight Color**

Choose the color to use for the *step type*. This color appears in the charts and in each chart legend where *Step Types* are displayed.

5 **Icon**

Choose the *CSS icon* to use for the *step type*.

6 **Show Count on Badge**

Select this option if you want the number of completions for the *step type* to be shown on the corresponding badge. See the Steps Badges chapter for full details.

7 **Engagement Type**

Defines whether the step is a *Milestone* or an ongoing *Rhythm*. *Milestones* mark significant events like *Baptism*, while *Rhythms* track ongoing behaviors such as *Small Group* participation.

8 **Organizational Objective**

Describes the main focus of the step and how it supports your organization's mission. This setting uses a *Defined Type* called *Organizational Objective* that includes the following *Defined Values*:

- **Outreach** – Connect with those outside the church to share the love and message of *Christ*.
- **Discipleship** – Guide individuals to grow in their faith and deepen their relationship with *Jesus*.
- **Activation** – Empower individuals to serve others and participate in *God's* mission.

9 **Impact Weight**

Indicates how significant the step is in a person's journey. Higher values show greater impact or investment. To calculate impact, multiply the number of completed steps by each *step type's Impact Weight* and sum the totals.

- Example: 100 completions × Weight of 3 = Impact Score of 300.

10 **Prerequisite Steps**

Use this field to require completion of one or more steps before starting this one.

11 **Completion Options**

Configure how the step can be recorded, tracked, or completed, including:

- **Allow Multiple**: Select whether the step can be completed more than once by the same person.
- **Spans Time**: Select whether the step occurs over a period of time or in a moment of time.
- **Is Date Required**: You can choose whether the date associated with a step is required. This applies to both Start and End dates if the step *Spans Time*.

12 **Call to Action Path**

The *Step Type*Call to Action Path helps turn *Steps* into clear, actionable invitations. It's designed for websites and mobile apps so people can easily see what their next step is and how to take it.

- **Call to Action Label:** The text shown on the button (e.g., "Join Now" or "Start Step"). Keep it short, clear, and action-focused.
- **Call to Action Link:** The *URL* where the next step happens, such as a form or registration page.
- **Call to Action Description:** A short explanation of what the action does and why it matters.

The *Call to Action* Path is an exciting way to make *Steps* more actionable. These will be used for websites and mobile apps to make discovering your next step and how to take it effortless.

> **Missing Some Prerequisites?**
>
> Behind the scenes we have programming that prevents two step types from being set as prerequisites of each other. For example, if Baptism is configured as a prerequisite to the Serve step, then the Serve step won't appear in the list of available prerequisite steps for Baptism.

The step type configuration also has settings for Step Attributes, Workflows and Advanced Settings. We will cover each of these areas individually in the following sections below.

Step Attributes

One or more attributes can be associated with a step type, using the page pictured below.

Assigning attributes to step participants is a great way to track details beyond whether a person simply started or finished a step.

Step Attributes

We should pause a moment here to highlight the *Show on Bulk* option pictured above, which is described in the Bulk Entry section. Regardless of whether the *Show on Bulk* option is used, the attribute value can always be set for an individual from the *Step Entry* or *Bulk Entry* pages.

> **Baptized Here Attribute**
> This attribute comes out of the box for the purpose of baptism tracking. Using this as your way to track baptism makes it easier for us to help you track common metrics.

If you need more information on setting up attributes in general, check out our `Person and Family Field Guide`.

Workflows

We've seen how workflows can be added at the program level, but they can also be added to individual step types. As you might have guessed, the key difference is that workflows added to a step type will only be used for that particular step.

For additional details on using workflows in Steps, see the Editing Step Programs section. For every other detail you could imagine related to workflows in general, see our `Blasting Off With Workflows` manual.

Advanced Settings

The Advanced Settings panel has options for customization and automation as described below.

Step Type Advanced Settings

Advanced Settings ⌃

1 Auto-Complete Data View ⓘ   **2** Allow Manual Edit ⓘ

▼ Adult Member & Att... ▾   ☑ Yes

Card Content Lava Template ⓘ **3**

```
1   <div class="card-top">
2       <h3 class="step-name">{{ StepType.Name }}</h3>
3   </div>
4   <div class="card-middle">
5       {% if StepType.HighlightColor == '' or IsComplete == false %}
6           <i class="{{ StepType.IconCssClass }} fa-4x"></i>
7       {% else %}
8           <i class="{{ StepType.IconCssClass }} fa-4x" style="color: {{ StepType.HighlightColor }};"></i>
9       {% endif %}
10  </div>
11  <div class="card-bottom">
12      <p class="step-status">
13          {% if LatestStepStatus %}
```

1 **Auto-Complete Data View**
New steps will automatically be added and completed for the people in the selected Data View when the *Steps Automation* job runs. This job respects the 'Allow Multiple' and 'Prerequisite Steps' configuration options described above. If a person is found by the Data View, any currently incomplete steps of this type will be completed for them. If 'Allow Multiple' is not enabled for the step type, and if the person hasn't taken the step, then a new step will be added in a Complete status. If 'Allow Multiple' is not enabled, and if the person already has a Complete step of this type, then nothing will happen for that person.

2 **Allow Manual Edit**
If this is disabled, people will not be able to add or edit steps of this type from the *Person Profile* page. This does not prevent manually editing steps from within the step program pages.

3 **Card Content Lava Template**
This is the Lava used to display the card content for Steps. See the Editing Step Programs section for additional details on cards. Generally, you shouldn't need to make changes here.

Steps Charts

In prior sections we only briefly mentioned the charts you've seen on the administrative screens. Now that we're more familiar with the data behind those charts, we're ready for a closer look. It's important to learn how to read and use these charts because they are truly powerful tools that provide a lot of useful information at a glance.

Unless otherwise noted, the information in this section applies to both the program and step type activity summary charts.

Let's start by looking at the parts of the chart.

Step Program Chart
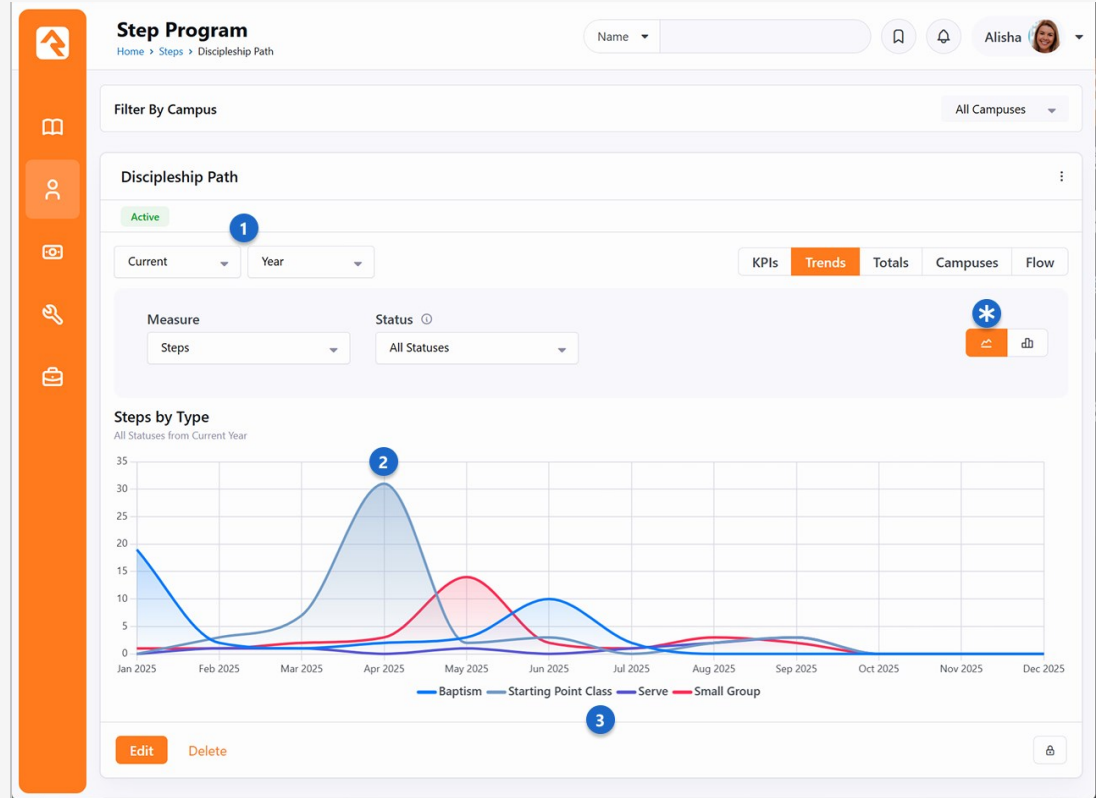
1 **Adjust Chart Timeframe**
The time period shown on the chart (i.e., the x-axis) can be changed here. If a "Year" interval is chosen then the chart will display months as pictured above, otherwise you'll see specific dates.

2 **Chart Data**
The data displayed here is in the form of a stacked area chart, which we'll describe in detail below.

3 **Legend/Key**
Only completed step types will appear on the *Step Program* chart. The *Step Type* chart shows activity for either started or completed steps.

> **Note**
>
> By default, the Steps charts are set to display the "Current Year". This default, and the option to disable the chart entirely, can be changed in block settings.

Let's focus on the April 2021 section of the chart below. We see the purple area reaches the "17" line on the chart. This doesn't mean that seventeen people completed the Small Group step. In this kind of chart, the Small Group area begins where the Serve area ends...they are stacked on top of each other, hence the term "stacked area chart".

The Baptism, Starting Point Class, and Small Group steps each had four completions. Five people completed the Baptism step. Adding those up, we get seventeen total completions in April 2021 as pictured below.

Example Step Program Chart
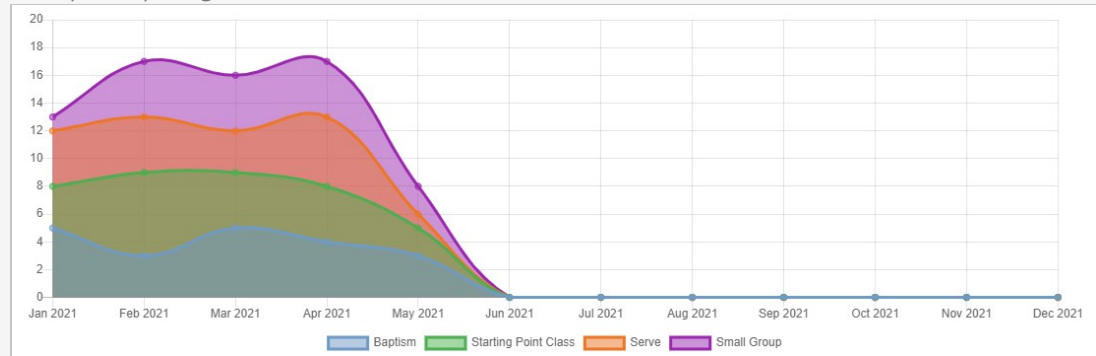
Build a Rainbow

Besides controlling the icon colors on the person profile, the highlight color you assign to a step type is reflected in the program activity summary chart. The colors you choose can make a big difference in how easy (or difficult) it is to read your chart.

Unlike the Step Program area chart, the Step Type area chart is "overlapping" and not "stacked". It's important to know the difference between these two types of charts.

In the example below, the green area (Completed) extends to the "6" line in February 2021. This actually means six people Completed the step. Also in May 2021 we see that four people Started the step, represented in blue. The blue and green areas overlap, hence the term "overlapping area chart".

Example Step Type Chart
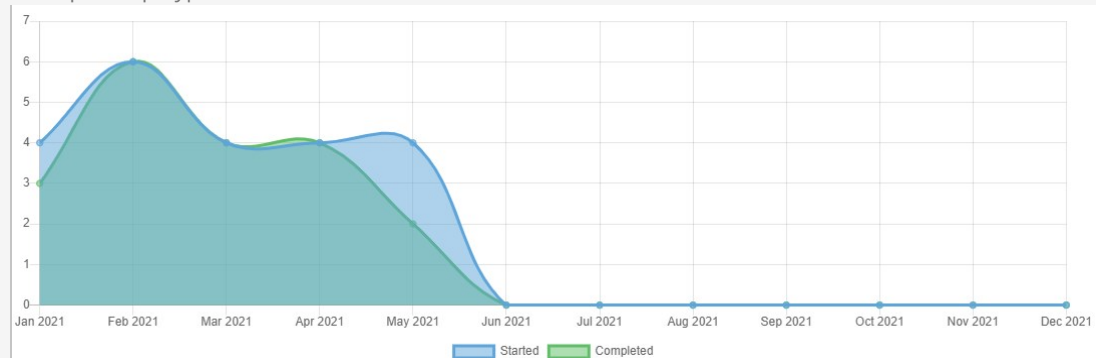
Chart Filters

Our Step Charts hold a lot of valuable information, so much that it takes some slicing to make sense of it. Let's discuss some ways to filter Step Charts.

Chart Filters Screenshot
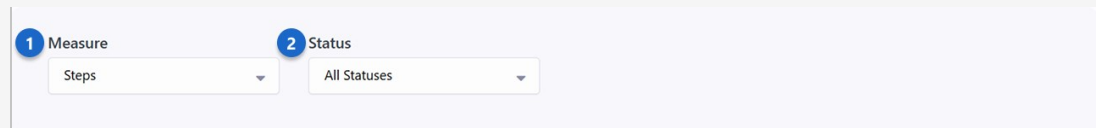
1. Measures (Trends, Totals, Campuses)
- **Steps**: Displays total *step* numbers by type.

- **Total Steps**: Sums all *step types* per period. Ideal for spotting overall engagement.
- **Total Step-Adjusted Impact**: Calculates the total of all *step types* multiplied by their *impact weight*. Useful for understanding overall *impact trends*. Must have an **Impact Weight** set.
- **Impact-Adjusted Steps**: Shows how each *step type* contributes to impact by multiplying *step counts* by *impact weight*. Must have an **Impact Weight** set.
- **Engagement Type**: Breaks down *steps* by *Milestone* and *Rhythm* categories. The *Step Type* must have an **Engagement Type** set.
- **Organizational Objective**: Breaks down *steps* by the *objective* assigned to each type. This helps leaders assess balance across ministry focus areas, such as *Outreach* and *Discipleship*.
- **Program Completions**: Displays total *program completions* for each period.
- **Avg. Total Steps Per Weekend Attendee (Campus Only)**: Displays the average number of total steps each *weekend attendee* has taken during a selected time period. For help setting up calculation of *Average Weekend Attendance*, see the *Metrics* section of the `Admin Hero Guide`.
  - **Formula:** Campus Total Steps (based on your current filters) ÷ average campus attendance (rounded to the nearest whole number)

2. Status (Trends, Totals, Campuses)
- **All Statuses**: Includes both completed and non-completed steps.
- **All Completion Statuses**: Shows only steps marked as complete.
- **All Non-Completion Statuses**: Shows only steps not yet completed.
- **In Progress**: Steps NOT marked as *Is Complete*.
- **Complete**: Steps marked as *Is Complete*.

The *Measure* toggle is available on the *Trends*, *Totals* and *Campuses* chart, helping you present *step-related data* in ways that make sense depending on the data you need.

The *Status* toggle utilizes the *Statuses* you have already set and filters chart data by the stage each *Step* is in.

The *Start Date* or *Completion Date* is plotted based on the *Status* you choose. For example, when you select the *All Completion Statuses* measure or any status marked *Is Complete*, the chart plots the *Completion Date* instead of the *Start Date*.

Chart Types

Below are examples of the charts you can view for a *Step Program*.

Trends

The *Trends* chart helps you see participation momentum over time. Use peaks to identify when engagement is most common and dips to detect potential disengagement. Each line represents a *step type*, letting you compare participation across activities such as *Baptism* or *Small Group*. Filters for *Campus*, *Measure*, and *Status* help you isolate data and uncover key ministry trends. There are two ways to view this chart:

Line Chart

Line Chart Screenshot

1 Adjust Chart Timeframe
The time period shown on the chart (i.e., the x-axis) can be changed here. If a "Year" interval is chosen then the chart will display months as pictured above, otherwise you'll see specific dates.

2 Chart Data
The data displayed here is in the form of a *stacked area chart*, which we'll describe in detail below.

3 Legend/Key
Only completed *step types* will appear on the *Step Program* chart. The *Step Type* chart shows activity for either started or completed steps.

Bar Chart

Bar Chart Screenshot

Totals

Totals provide a snapshot of overall engagement volume. Use this chart to see which *step types* dominate participation during a given period. Hover over bars to view specific counts and compare activity across months.

Totals Chart Screenshot
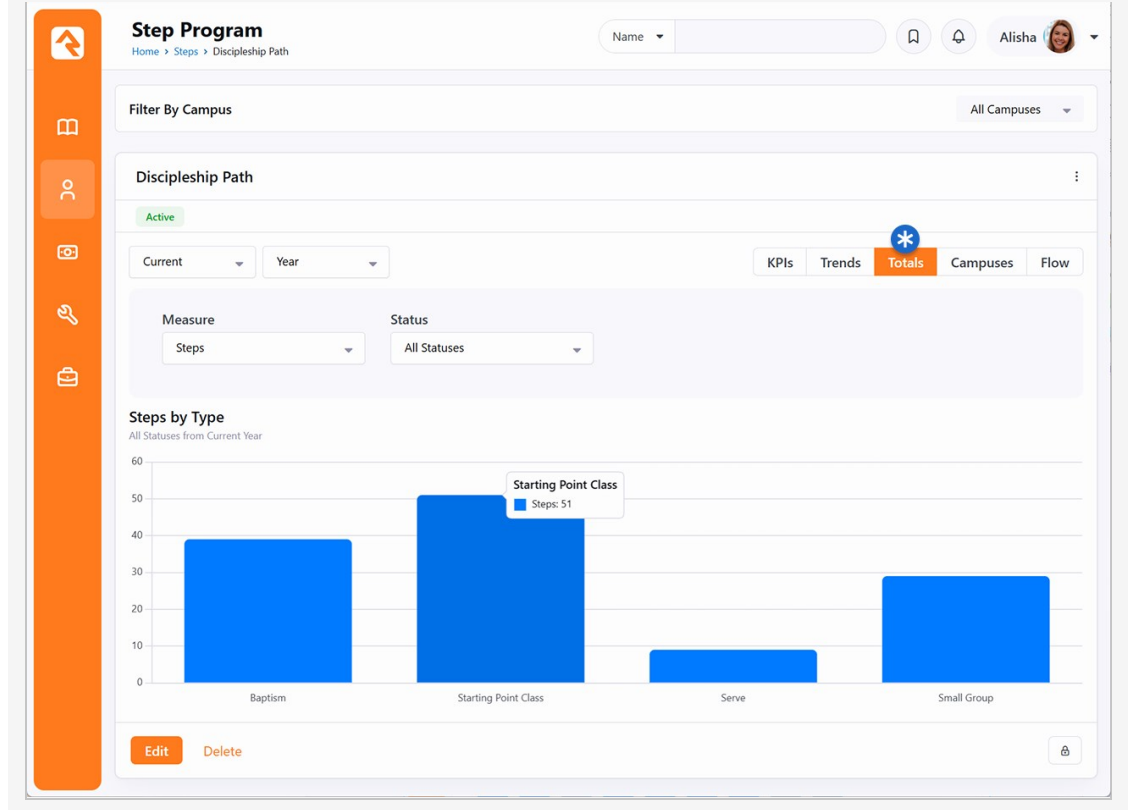
Campuses

This chart visualizes how each *campus* contributes to total *step completions*. It helps ministry leaders assess which *campuses* have engagement growing steadily and which may need additional engagement strategies.

Campuses Chart Screenshot
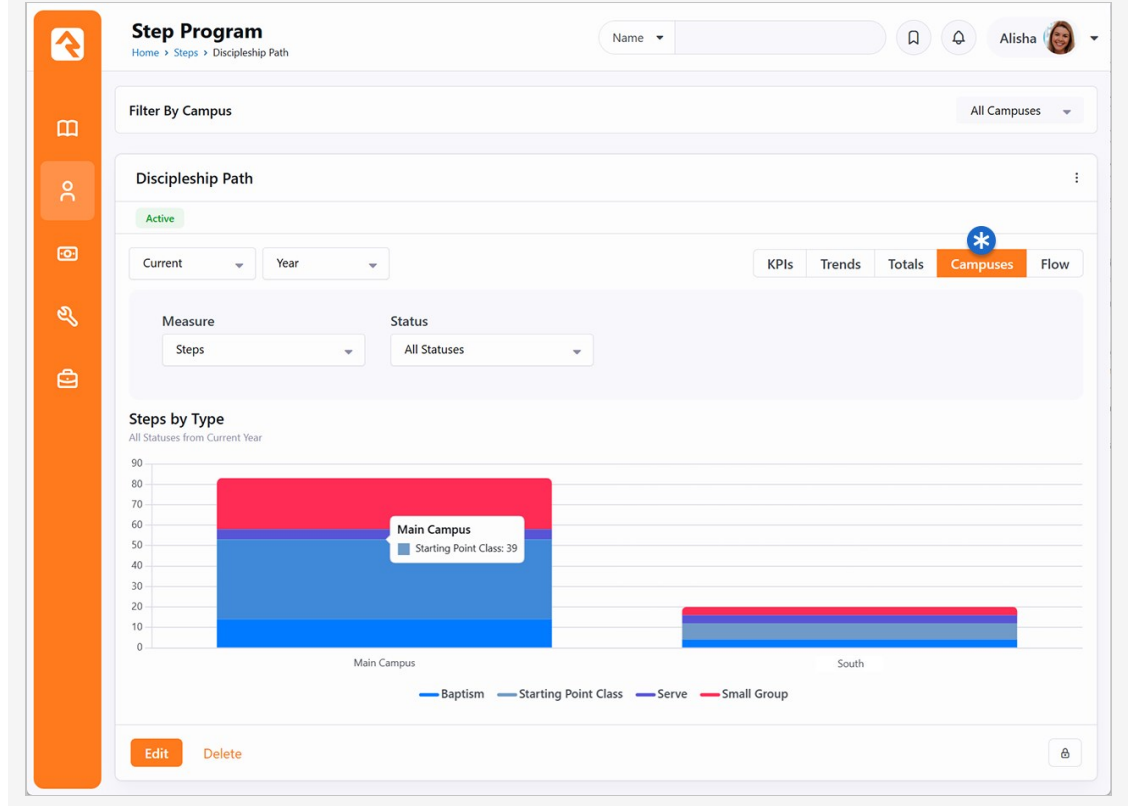
Flow

Rock's Step Flow chart gives you powerful insights into your *step program*. This diagram shows each *step* in your program and visually illustrates how people move from one *step* to another or stop after a certain *step*. Pay close attention to areas where people drop off. We'll show you how to spot those.

Flow Chart Screenshot
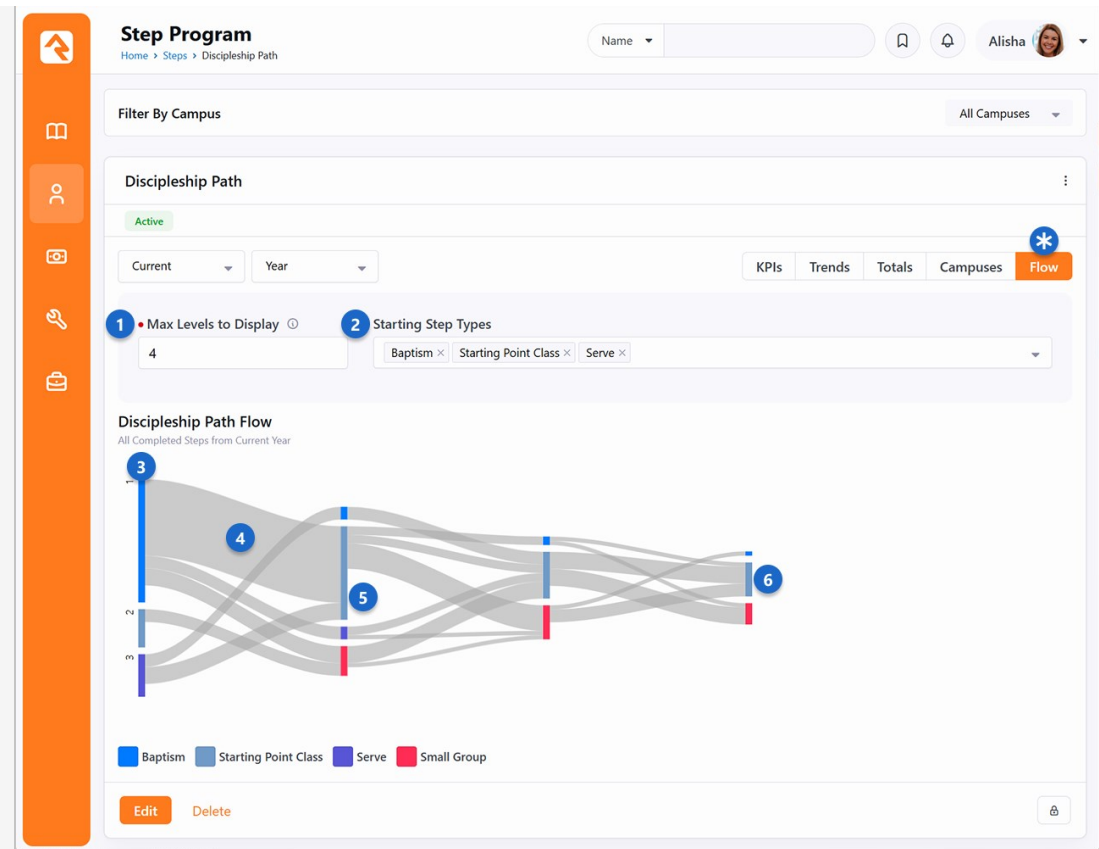
1 Max Levels to Display
In this example we're only showing four levels, but more exist. You might need to increase this number to get a full picture of how people are flowing from one *step* to the next across your program.

2 Starting Step Types
Select the *Step Types* that should be displayed on the first level. The other *Step Types* will still be shown, just not at the first level.

3 First Level
This is the first *step* that people take in the program. In this example we can see each *step* in the program listed vertically. This tells us that people start the program from any one of the four *steps*, but we know most people start with *Baptism* or the *Starting Point Class* since those are the largest bars.

4 Step Flow
The thick gray lines that stretch from one colored bar to the next represent people moving from the *step* on the left to the *step* on the right. The thicker the line, the more people it contains. In this example the majority of people who start with the *Starting Point Class* proceed to the *Starting Point Class* a second time. We can also see that some people who started with the *Starting Point Class* proceeded to the *Small Group* step. Notice that nobody does the *Baptism* step after the first *Starting Point Class* step.

5 Step Falloff
You'll want to pay close attention to areas like this. After the second *Baptism* step, some people proceeded to the *Starting Point Class*, and some proceeded to *Small Group*. But there's a large empty area to the right of the blue bar. This represents people who took the *step* and then did not proceed with any other *steps*. In this example we see that a majority of people are no longer involved with the program when their second *step* is *Baptism*.

6 Last Level
Remember that in this example we selected '4' as our *Max Levels to Display*, so nothing will

be displayed beyond that point. Don't assume nobody continued with the program after their fourth *step*.

You'll want to pay special attention to the empty areas to the right of the colored bars. These areas reflect program abandonment, or *step falloff*. You'll want to investigate why people stop participating in the program after certain points. The *Step Flow* lets you visually see where those points of *step falloff* are, to identify areas where changes in your program might be needed.

As you can see, the *Step Flow* provides great insight into how people move from one *step* to another (or stop moving entirely) throughout your program. That might be all you need, but there's more to be seen. Hovering your mouse over the colored bars or over the gray flow lines will give you additional details, providing further insights.

Step Flow Hover Text
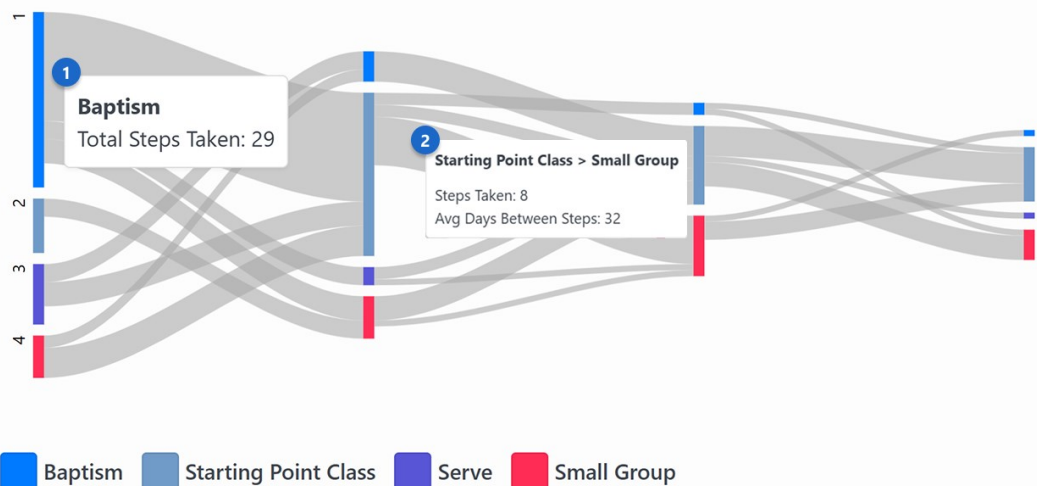
1 Step Details
Hovering your mouse over one of the colored vertical bars will give you the name of the *step*, and how many people took that *step*. Here we can see that 12 people started the program with the *Starting Point Class* step.

2 Flow Details
If you hover your mouse over any of the gray lines, you can get additional details. In this example we're looking at the flow from a *Starting Point Class* step to a *Serve* step. We can see that four people who took the *Starting Point Class* as their second *step* proceeded to the *Serve* step. We can also see the average amount of time between those two *steps* is 44 days.

Steps Badges

You have the option of displaying badges for your step programs, to quickly and easily view an individual's progress from places like the *Person Profile* page or Connection Requests.

To add Steps badges, first navigate to `Admin Tools > Settings > General > Badges` and add a row to the badge list. A single badge should be set up for the entire program (and not one badge for each step in the program) using the page below.

Edit Badge

1 **Name**
Provide the name of the badge.

2 **Description**
Add a description for the step program/badge.

3 **Entity Type**
For step badges, the entity type will be "Person".

4 **Badge Type**
For step badges, the badge type will be "Steps".

5 **Step Program**
Choose the step program to which the badge applies. This field only appears if you've selected "Steps" as the badge type.

6 **Display Mode**
Select how badges appear in the person profile.
- **Normal:** Badges for individual steps are displayed as normal-sized badges, similar to existing badges you're used to seeing.
- **Condensed:** Badges for individual steps are smaller icons, grouped together with other steps from the program.

Example "Normal" Display Mode

Example "Condensed" Display Mode
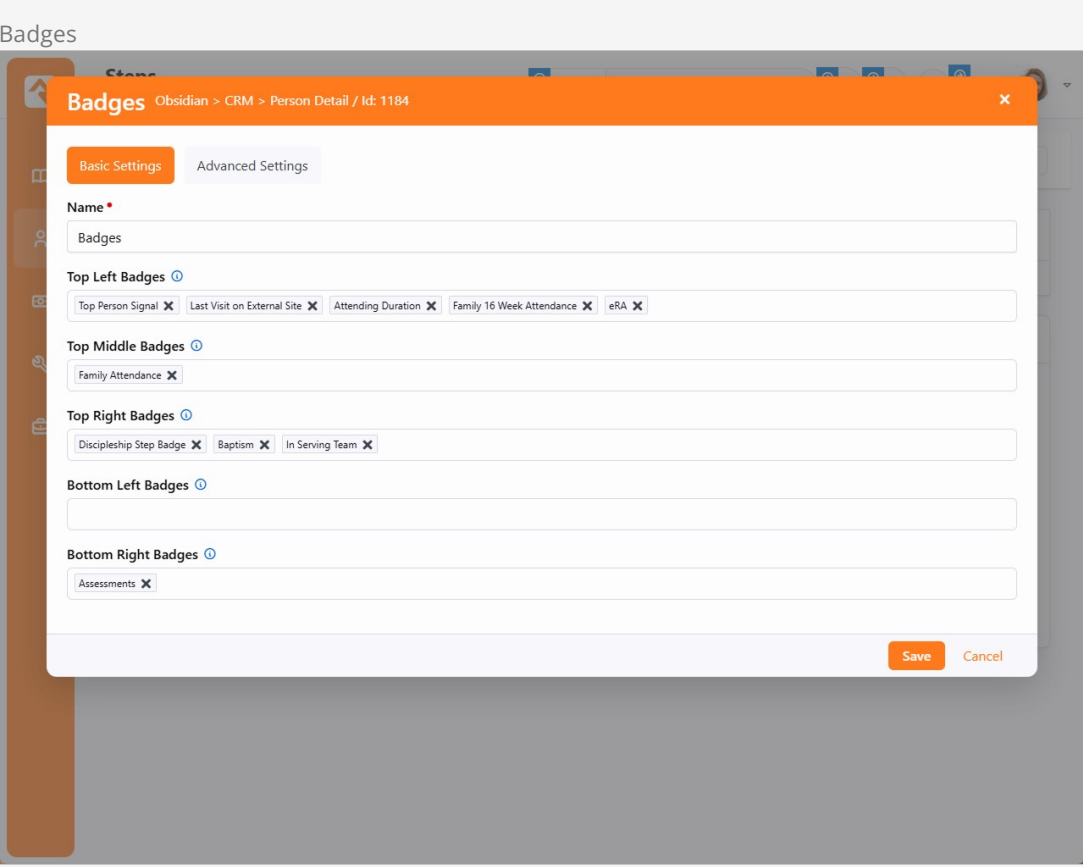
> **Note**
>
> The "Show Count on Badge" setting we mentioned in the Editing Step Types section only applies to the "Normal" display mode.

After you've set up your new badge, the next step is to add it to the *Person Profile* page.

From the person profile, click the ☐ button in the *Admin Toolbar*. This will display a block properties button for each block on the page. Hover over the badge container block and select its ☐ button. The *Badges* page pictured below will appear, where you can select your new badge to have it added to the bar.

Badges

Check out our `Person and Family Field Guide` if you want to learn more about badges in general.

Streaks Overview

Before we get started, you should know we're not finished with our work on streaks. We're excited to show you what we have so far, but there are still a lot of features that aren't quite ready just yet. Still, there's plenty to see and do, so let's dive in.

Streaks takes attendance data to the next level by helping you find and analyze meaningful engagement patterns. So, what does that mean? Whether or not you're into sports, you've probably heard people refer to a team or a player as being on a 'winning streak' or a 'losing streak', which just means they've won or lost several times consecutively. Streaks in Rock is similar, except we're talking about attendance or, in a broader sense, engagement.

The most basic definition of streaks is that it tells you how many times in a row someone engaged at your organization. But, even though it's very cool to know that someone is showing up for their 16th straight weekend, that definition is insufficient because there's a whole lot more Streaks can do.

Streaks Maps

To truly understand streaks, you'll need to understand maps, so that's where we'll start. These maps won't help you navigate the globe, but they will help you navigate streaks like you're the Magellan of Rock!

We've already mentioned that streaks are used to find engagement patterns. Maps are what Rock uses to collect and analyze the data needed to find those patterns.

There are three kinds of maps:

- **Occurrence:** The occurrence map defines when it's possible to participate in something. This gives a framework for deciding if an individual has been participating regularly or not. After all, how can you tell if someone missed a meeting if you don't know there was a meeting scheduled?
- **Engagement:** The engagement map tells you when an individual has or has not participated in something. In effect, you can think of it as a person's attendance. However, it's important to know that the engagement map isn't just a fancy new name for attendance. The two share many characteristics but are not the same.
- **Exclusion:** In school you may have been introduced to the concept of 'excused' versus 'unexcused' absences. An excused absence is acceptable, but an unexcused absence might have negative consequences. The exclusion map is for tracking excused absences. Exclusions don't prevent a streak from being positively affected by an attendance, but absences are ignored and don't cause streaks to be broken. Exclusions can be provided for an individual or a location. Exclusions on locations can be used for events like snow days or other circumstances that might close a campus.

All three of these maps are used to calculate streaks. For example, let's say you want to calculate someone's streak in a recurring weekly meeting. You would need to know when meetings were held (occurrence map), which meetings someone attended (engagement map) and whether missed meetings should be forgiven (exclusion map).

Streak Types

The streak type tells the system where and when to look for streaks. For example, do you want to track weekend attendance at the Main Campus since it opened? Or do you want to track small group attendance at the West Campus starting six months ago? All that gets built into the streak type setup. A streak type also contains the people for whom you want to track streaks.

To manage your *Streak Types*, head to `People > Engagement > Streaks`. From here you can see streak types you've already set up, along with some basic information about each. You can also add or delete streak types.

We'll start by reviewing what you can see on this page. We'll explain the setup in the next section.

Streak Types List

1 **Name**
The name of the streak type is displayed in the first column.

2 **Active**
A checkmark will appear if the streak type is currently active.

3 **Frequency**
The frequency for the streak type (Daily, Weekly, Monthly or Weekly) is shown here for reference.

4 **Start Date**
Every streak type requires a *Start Date*. The start date plays a major role in calculating streaks, so it's important to keep track of it.

5 **Enrollments**
The *Enrollments* count is the number of individuals enrolled in the streak type.

Don't worry if you're not sure exactly what all of this means yet. What's important for now is to be familiar with the page in general. We'll get into the details in the next section.

Add New Streak Type

Adding new streak types may look like a simple task because there aren't a ton of fields. While it's true that the setup is simple, don't take it lightly. Before you start, it's best to have a plan in mind for why and how you want to use the streak type.

In this example we'll be tracking streaks for our "ASU Student Group", a small group that meets weekly on Saturdays. Everything related to the group has already been set up. In fact, the group is already well-established and has been meeting regularly for a while. They weren't taking attendance in Rock at first but started a few months ago. With that backdrop in mind, let's add a new streak type for this group.

1 **Name**
Provide a name for the streak type. For our example we're just using the name of the small group.

2 **Active**
Set the streak type to active or inactive.

3 **Description**
You can optionally provide a description for the streak type.

4 **Start Date**

The start date controls how far back in time the streak type can look for data. In this example we used 8/1/2021, so engagements from July 2021 or earlier won't be included in these streak calculations.

5 **Sync Linked Activity**

If this is enabled, then additions to a person's attendance or interactions (based on the Linked Activity) will cause a matching update to the person's engagement map. The reverse will also happen, where adding to a person's engagement map will result in creating new attendance or interaction data.

6 **Require Enrollment**

If enabled, an individual would need to be manually enrolled in the streak type. Otherwise, the person's engagement will create an enrollment into the streak type for them automatically.

7 **Linked Activity**

This setting, combined with the *Activity Target* setting described below, helps link the streak type to group, schedule, location, interaction, financial and attendance data. There are several options to choose from:

- **None**
  You can choose not to have any Linked Activity. In this case you'll have to manage everything (enrollments, maps, exclusions) manually.
- **Attendance: Any**
  Use this option to cast a wide net. As the name implies, this option will use any available attendance data to build streaks.
- **Attendance: Group**
  You might use the group option to track streaks for something like weekend attendance. In that case, the *Activity Target* would be the group you use for weekend attendance tracking. The locations and schedules associated with the group are then used to build the streak type maps.
- **Attendance: Group Type**
  If you select group type then all groups of a certain type (according to your *Activity Target* selection) will be included in the occurrence and engagement maps. For example, you may want to use this linked activity if you're tracking streaks for serving because, in many cases, serving groups all share the same group type.
- **Attendance: Group Type Purpose**
  With this option, all groups under any group types that share the same purpose are used to build occurrence and engagement maps. For example, you might have two different group types that both contain serving groups. You'll pick the specific purpose in the *Activity Target* field below.
- **Attendance: Check-In Configuration**
  If you select this option then any group that's used in the specified *Activity Target* check-in configuration will count toward the occurrence and engagement maps. This option is probably best for more complex streaks, like tracking children's check-in.
- **Interactions**
  You can use interaction data to drive your streaks. You can choose either Interaction Channels, Interaction Components or Interaction Mediums as the Linked Activity. This is a great way to track engagement beyond traditional in-person attendance.
- **Financial Transaction**
  Giving is another area where a person can have a streak. You can optionally limit the financial transactions that are evaluated for the streak to a specified account.

It's important to remember that for this example we're using the *Attendance: Group* linked activity.

8 **Activity Target**

This field changes according to your *Linked Activity* selection (above). Specify the group, group type, group type purpose, financial account or check-in template you want to use to build maps for the streak type.

In this example we selected *Attendance: Group* as the linked activity. This allowed us to specify "ASU Student Group" as the group we want for our streak type.

9 **Frequency**

The frequency determines whether this is a *Daily*, *Weekly*, *Monthly* or *Yearly* streak type. Pick the frequency that makes the most sense for what you're tracking. Our example group meets once every week on Saturdays, so *Weekly* was selected. You might pick *Daily* if you're tracking something that meets several days per week.

10 **Day of Week Start**

If the frequency is *Weekly*, then you can optionally choose the start day of the week. You'll only need this if you want to use a different start day than the system default.

> **Warning**
>
> You can't manually change the *Start Date* or *Frequency* after they're saved. Generally, the only way to correct these fields is to start over with a new streak type.

Streak Type Detail

After saving your new streak type, you'll be brought to the streak type detail page. You can also access this page by clicking on a streak type from the list (see Streak Types).

We'll look closely at the detail block before moving down the page to check out the list block at the bottom.

Streak Type Detail Block

1. **Streak Type Information**
   Along the left side of the block, you can see most of the settings for the streak type. These are shown for reference. You can edit or delete the streak type using the corresponding buttons at the bottom of the block.

2. **Achievements**
   Clicking here takes you to a page where you can view or edit *Achievements* for the streak type. See the Achievements chapter below for instructions on setting up achievements.

3. **Map Editor**
   This button will take you to an edit page that allows you to modify the occurrence map. We'll explore the map editor in the Occurrence Map Editor section below.

4. **Exclusions**
   This button will navigate you to a page that allows you to add location exclusions. We'll cover the details in the Location Exclusions section.

5. **Rebuild**
   Clicking this button deletes streak data and rebuilds it from attendance or interaction records. Because rebuilding deletes data, be sure that's really what you want to do. However, you might want to *Rebuild* (i.e., build) as part of your initial setup. The impacts of rebuilding a streak type are described in the Streak Type Rebuild section.

You may notice that the *Start Date* changes from what you originally entered when creating the streak type. The date may be rounded up to the next Sunday. This happens if the streak type is weekly because weeks end on Sunday by default. To put it another way, if you're tracking streaks on a weekly basis then it doesn't really matter which specific day of the week someone engaged.

Occurrence Map Editor

Click on the `Map Editor` button to edit the occurrence map for the streak type.

When you add a new streak type the occurrence map will initially be blank as pictured below. The map can be populated manually through the editor, or it can be built from attendance or interaction data using the streak type `Rebuild` button (see Streak Type Rebuild).

Occurrence Map Editor

1. **Date Range Selection**
   Adjust the date range and click the `Update` button to change the dates you see in the bottom portion of the block.

2. **Occurrence Map**
   This is where you'll edit the occurrence map by picking which weeks (or days) should be included in the map. The *Start Date* for the streak type is 8/1/2021, so any dates prior to that can't be chosen. You also can't select dates that are in the future.

When you update the occurrence map, you're changing the list of possible meetings. The most common reason to do that would probably be to remove dates where a regularly scheduled meeting isn't taking place due to things like weather events. Removing dates from the occurrence map ensures nobody's streak is broken for missing something that never actually took place. It's important to know that changes to the occurrence map will not be reflected in everyone's streak data in the blocks until the nightly cleanup job runs.

In our small group example, we'll manually select all of the weeks that are available as pictured above. Any absences in any of those weeks will count against a person's streak.

You might find it odd that the current week (or day) is not shown in the streak graph. Not to worry, we did this intentionally to avoid scaring anyone into thinking their streak had been broken, when in reality they simply haven't had a chance to engage yet. By default, streak calculations and graphs exclude the

current day or week.

Location Exclusions

Click the `Exclusions` button from the *Streak Type* page to access the list of excluded locations. Excluding a location means a person's streak won't be broken if they missed an event or meeting at that location for the date(s) specified. You could use this for snow days, or other similar events that might close a campus or location.

Location Exclusion

Streak Type Enrollment

Below the streak type detail block is the enrollment list block. Here you can see all the participants in the streak type and their streaks.

When you first create a new streak type the enrollment list will be empty. The list pictured below has individuals on it for example purposes only. We'll review the block first, and then show you how to get individuals added.

Streak Type Page - Enrollments

Streak Type
Home > Streaks > Marble Group

Name ▾

Alisha

Marble Group Enrollments

Filter Options ⌄

① Name	② Recent Engagement	③ Current Streak	④ Longest Streak	⑤ Engagements	⑥ Enrollment Date		
Will Jones	⅃⅃⅃⅃⅃⅃⅃⅃	1	4	7	8/12/2025	👤	✕
Alisha Marble	--------------------	6	6	11	8/12/2025	👤	✕
Bill Marble	--------------------	6	6	11	8/12/2025	👤	✕
Becky Peterson	‖‖‖__‖___‖_____	1	4	8	8/12/2025	👤	✕
Nancy Sweeney	__‖‖‖__‖_‖_____	2	5	10	8/12/2025	👤	✕
Rob Tennant	_‖‖‖_____‖_____	0	9	10	8/12/2025	👤	✕

50 500 5,000   6 Streaks

Crafted by Spark Development Network / License

① **Name**
Individuals who are enrolled in the streak type have their names and photos listed here.

② **Recent Engagement**
This graph shows the recent history of engagement for the individual. Our example is weekly, so each bar represents one week.

③ **Current Streak**
This column shows a person's current streak, relative to today.

④ **Longest Streak**
This column shows the longest streak the individual has ever had.

⑤ **Engagements**
You can see the total number of engagements for the individual.

⑥ **Enrollment Date**
This is the date when the person entered the streak type. Absences and engagements prior to this date are ignored when calculating the person's streak.

There are two ways to enroll individuals into a streak type. We mentioned earlier that you can click the `Rebuild` button to add individuals from attendance records. We'll look closely at that method in the Streak Type Rebuild chapter. The other method is to manually add a single person to the list.

Add New Streak

① **Person**
Find the person you want to enroll into the streak type.

② **Location**
Select the person's 'home' location to use for exclusions. If you have multiple campuses, you might want to track a person's streak at one campus separately from the others.

③ **Enrollment Date**
Enter the date when streaks should start for this person. Absences and engagements before the enrollment date are ignored. You can think of this as being like the streak type *Start Date*, but for an individual person. You can't manually change the enrollment date after you save, so it's important to pick the correct date for the individual.

As soon as you save, you'll be brought to the *Enrollment Detail* page.

Streak Enrollment Detail

You can access the *Enrollment Detail* page either by clicking on an existing person from the enrollment list block, or after manually adding a new person to the list.

In the prior section we added Ted Decker with an Enrollment Date of 8/1/2021. After clicking Save we're brought immediately to Ted's *Enrollment Detail* page.

Enrollment Detail Page - New Add

1 Enrollment Date

The date we selected when adding Ted to the list is shown here for reference. It's important to remember that every individual in a streak type can have a different enrollment date.

2 Streaks

Ted is showing zeros for *Current Streak* and *Longest Streak*. That might be fine, but we have group attendance data showing Ted has been participating regularly for months. Ted's attendance isn't reflected here because we manually added him and are (at this point) manually maintaining his streak data.

3 **Rebuild**

We mentioned the `Rebuild` button on the *Streak Type* page earlier. The button here is very similar. You'll see what it does in the Individual Rebuild section.
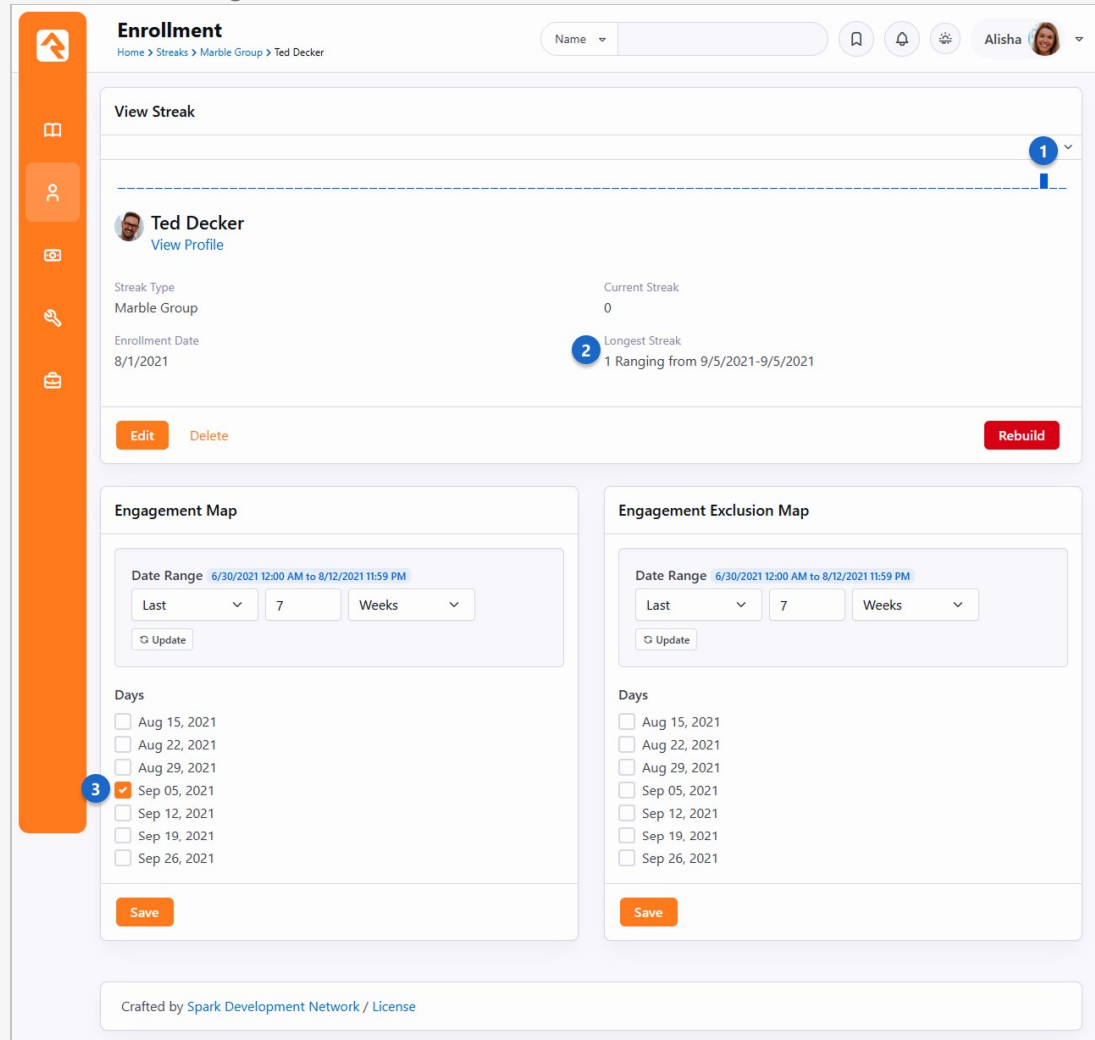
4 **Engagement Map**

Similar to an attendance record, you can use this editor to indicate when an individual has or has not engaged. If you use the `Rebuild` button, this map will be updated to match Ted's small group attendance data (see Individual Rebuild). It's blank now because we're building Ted's streak manually (see Manual Tracking).

5 **Engagement Exclusion Map**

Here you can manage exclusion dates for an individual. For excluded dates, absences are ignored and don't cause streaks to be broken. The selections here don't apply to anyone else in the streak type.

Manual Tracking

We know from attendance records that Ted should have streak numbers higher than zero. But we're taking the manual path, so we need to manually feed that into Ted's streak data. Take a look at how the page changes after selecting the "Sep 05" week in the engagement map.

Enrollment Detail Page - Manual

1. Engagement Graph

With an engagement manually recorded, now we have some streak data. You can see a blue bar has been added near the end of the graph to mark Ted's recent involvement.

2. Longest Streak

We can also see Ted's *Longest Streak* count is now "1" instead of "0". The *Current Streak* is still zero because the engagement we added is in the past.

3. Engagement Map

Adding the selected week to the map is what updated the streak data noted above.

Map Updates

After updating the engagement or exclusion maps be sure to save and then refresh the page to verify the changes.

That's the manual route for Ted. But what if you want to build streaks in a more automated way according to actual attendance records? As we mentioned earlier, you can do that by using the *Rebuild* feature.

Individual Rebuild

Let's see how Ted's data has changed after clicking the Rebuild button.

> **Individual Rebuild**
>
> The rebuild process will delete the individual's engagement map data and rebuild it from attendance records. Any manual changes you've made to the engagement map will be lost.

Enrollment Detail Page - Rebuild

1. Engagement Graph

At the top of the block, we see several new bars have popped up. From left to right, this graph shows:

- Two consecutive weeks of attendance (8/8 – 8/15)
- One week absent (8/22)
- Two consecutive weeks of attendance (8/29 – 9/5)
- One week absent (9/12)
- One week of attendance (9/19)

2. Streak Data

As a result of the rebuild, the *Current Streak* and *Longest Streak* were both updated from Ted's attendance records.

③ Enrollment Date
Notice that Ted's enrollment date was changed from 8/1 to 8/8 by the rebuild process. Even though Ted has attendance data prior to that date, 8/8 was chosen because individual streaks can't go any earlier than the streak type start date.

④ Engagement Map
When building from attendance data, you'll see three different types of date selections in the engagement map:

- **Selected, Editable:** Weeks where Ted has small group attendance data have been selected with a checkmark (e.g., "Sep 05"). You can manually remove these engagements from the streak data by unchecking these boxes.
- **Not Selected, Editable:** In this example Ted didn't attend the weeks of "Aug 22" or "Sep 12" so they are not selected. You can manually add engagements to streak data by selecting these boxes.
- **Not Selected, Not Editable:** This applies to dates before the person's enrollment date, or dates in the future.

What if we want to include Ted's attendance data from June and July? We've already established that this streak can't go any earlier than 8/1 due to the streak type start date, and that the start date can't be changed. So, at this point, if we want to include earlier attendance, we'll need to rebuild the streak type. Aside from creating an entirely new streak type, rebuilding is the only way to alter the start date. We'll cover what that looks like in the Streak Type Rebuild chapter.

Don't forget that the streak type occurrence map (see Occurrence Map Editor) applies to a person's individual enrollment data. Only dates that are selected on the occurrence map will be reflected in an individual's streak data.

Exclusions

Looking closer at the *Engagement Map*, we can see Ted didn't attend the week of August 22nd. We know Ted's car broke down in a storm that week, and we're feeling generous, so we've decided to ignore that absence in Ted's streak data. All we need to do is select the "Aug 22" week in the exclusion map and click the Save button. Now it's like the absence never happened.

Enrollment Detail Page - Exclusion

Engagement Graph
① You might notice the engagement graph looks the same as it was before adding the exclusion. That's because the graph still accurately reflects data from attendance records. Ted's absence still exists even though we excluded it from his streak data.

Longest Streak
② Ted's longest streak is now "4" even though we can see from the engagement graph that he never actually attended four times in a row. The exclusion doesn't count toward the streak, but it also doesn't break the streak. In other words, the excluded date is skipped over.

Engagement Map
③ Like the engagement graph, we can still see that Ted didn't attend the week of "Aug 22" because it isn't selected in the engagement map. This is accurate according to attendance data.

Engagement Exclusion Map
④ Selecting "Aug 22" triggered the updates in the above points. If anyone were to question the discrepancy between attendance and streak data, it's clear here that a week was manually excluded.

Streak Type Rebuild

We've already covered streak types, but we didn't go into detail on what happens when you use the *Rebuild* feature. Now that you've seen what rebuilding an individual's enrollment looks like, you can apply those concepts to rebuilding the streak type.

Let's go back in time to when we first added our new streak type. As a reminder, this is how the page originally looked before we added Ted:

1 Start Date
Note the 8/1/2021 start date because it's about to change.

2 Enrollments
There are no enrollments currently. Remember, we're going back in time to before we manually added Ted, so this is a clean slate.

3 Rebuild
We'll use the rebuild feature to enroll individuals into the streak type according to attendance data.

After clicking the `Rebuild` button you'll notice several changes.

1 Start Date
The rebuild process changed the start date to 3/28/2021. This is the earliest week that attendance data exists for the small group.

2 Enrollments
Three people were automatically added to the enrollments list. These individuals were selected because they have attended the small group at least once.
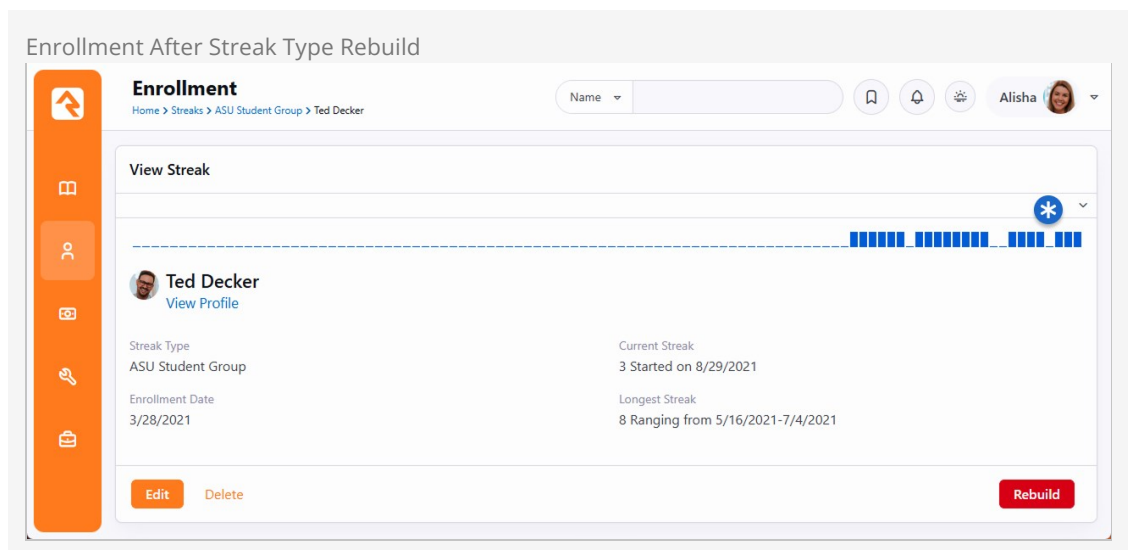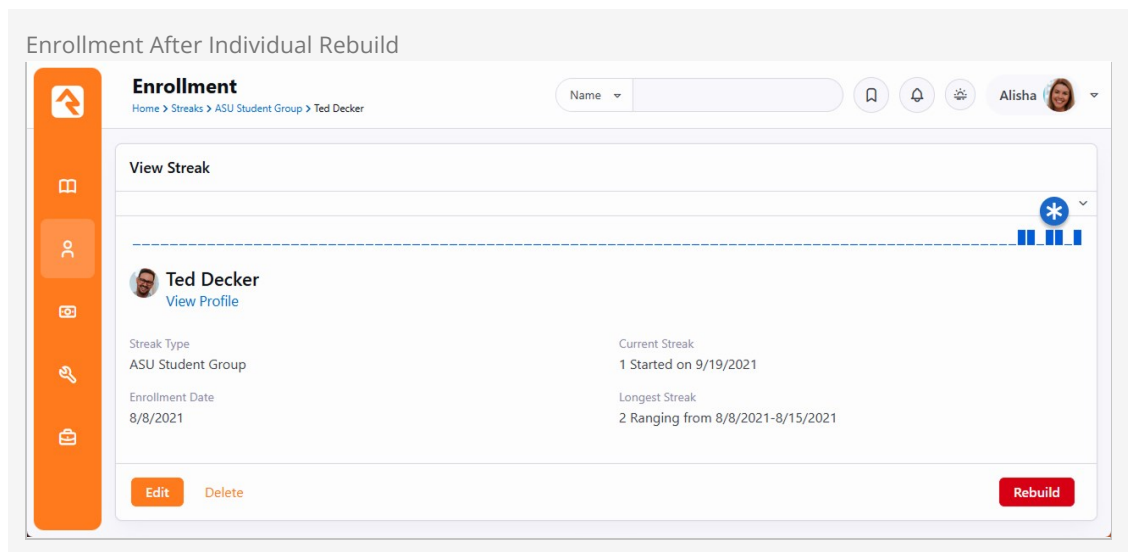
3 Streaks
The Current Streak, Longest Streak and Engagements counts are based only on attendance data.

4 Enrollment Date
Each person's enrollment date is calculated individually by the rebuild process. The date is set to the earliest date the person has ever attended according to attendance records. In this case all three individuals attended the first meeting where attendance was recorded, so they all have the same enrollment date.

If we compare Ted's data now to what it was when we rebuilt him in the Individual Rebuild section, we can see some obvious differences. Mostly these differences are because Ted now has an earlier enrollment date. However, there's one other difference you should know about.

Let's do a quick comparison of Ted's enrollment pages, paying close attention to the engagement graph near the top of the block.

Enrollment After Individual Rebuild

Enrollment After Streak Type Rebuild

There was a gap in attendance that has seemingly disappeared from the graph after the streak type was rebuilt. Ted had two recent gaps, but now he only has one. If the `Rebuild` button is supposed to pull from attendance data, and if the attendance data hasn't changed, then what caused this discrepancy?

This can be traced back to the *Occurrence Map*. Since we were originally taking the manual route for this streak type, we manually selected all available weeks in the map. Then we rebuilt Ted's streak from attendance data. Because Ted didn't have attendance data for the weeks of "Aug 22" or "Sep 12" we saw two gaps.

Now, on the other hand, we've rebuilt the entire streak type and not just one person's data. The rebuild process updated both the *Occurrence Map* and Ted's engagement according to attendance data.

Rebuilt Occurrence Map
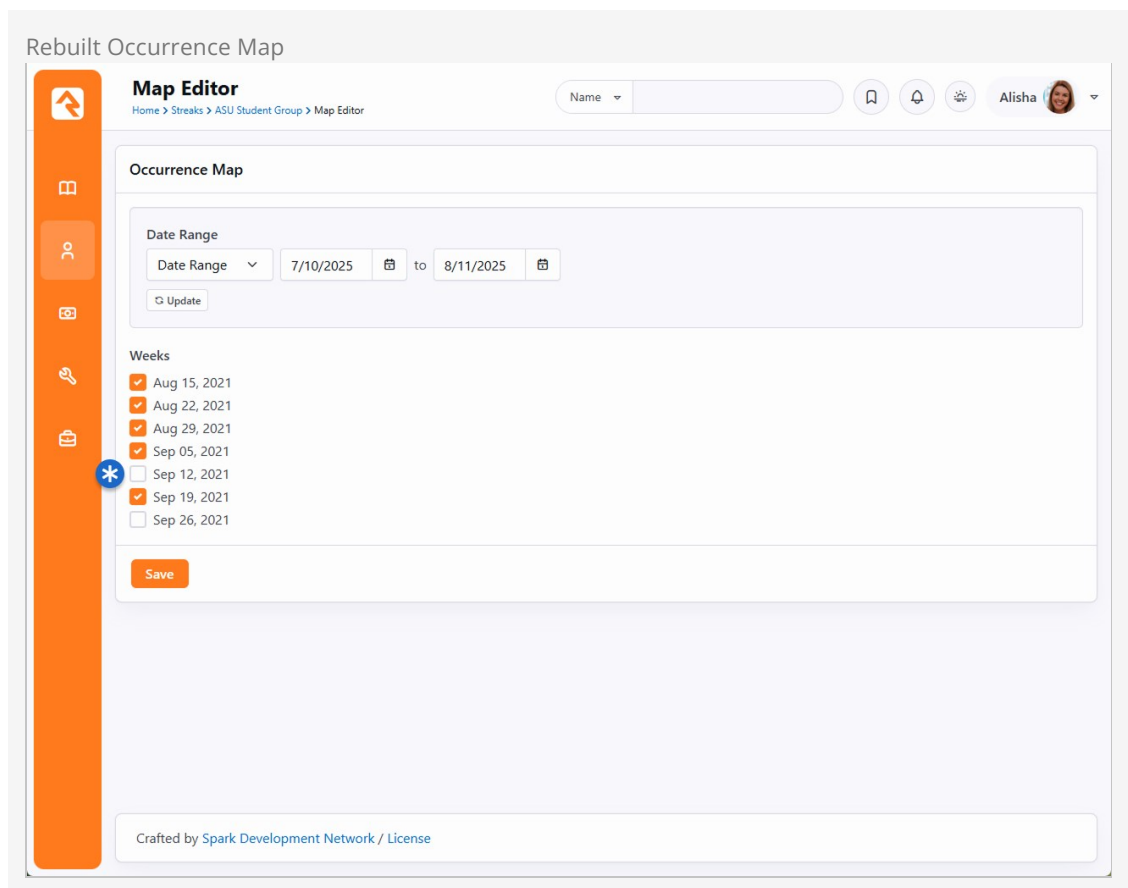
Notice that the week of "Sep 12" isn't selected. The rebuild process knew to skip this week because the attendance record shows the group "Didn't Meet" as pictured below.

Group Attendance

Because the group didn't meet at all, that week was removed from the occurrence map and ignored in streak data. The remaining gaps in Ted's attendance are truly the result of an absence.

Achievements

> *"What you get by achieving your goals is not as important as what you become by achieving your goals."*
>
> -Henry David Thoreau

With *Achievements* you can define goals that are measured against things like engagement and interaction data. For instance, you may want to recognize when a person has attended services three times in a row in a single month. You could wade through the raw data looking for that kind of pattern, but *Achievements* will do that for you automatically.

Before we jump in too deep let's define a few terms for you.

- **Achievement Type:** Each achievement type represents a specific goal and defines what a person (or any entity) must do to reach that goal. You can have several types of achievements to track different kinds of goals.
- **Achievement Attempt:** When a person tries to meet the goal of an achievement type, an achievement attempt is created for the person. Depending on how the achievement type is configured, a person can have one or many attempts. If the achievement type's goal is to attend services three weeks in a row, then an attempt will be created the first time a person attends a service.
- **Achievement – Successful Attempt:** An attempt is successful, and the achievement is earned, if the person meets the conditions of the achievement type. So, if the goal is to attend three services in a row, then the person will have successfully attempted the achievement after they've attended their third consecutive service.
- **Closed Attempt – Not Successful:** Reaching any goal in life can be challenging, and we're not always successful. If the achievement type's goal is to attend three services in a row, then the attempt will not be successful if the person attends the first week but not the second. In this case, the attempt is not successful and is closed. The next time the person attends a service, a brand new attempt toward that achievement type will be created.
- **Attempt Progress:** There's usually a period of time between starting and finishing an achievement attempt. During this time, the attempt is considered in progress because we can't know in advance if the attempt will be successful or not. Rock tracks a person's progress toward the goal along the way. Continuing with the service attendance example we've been using above you can track that a person who has attended two consecutive weeks is two-thirds (or 66%) of the way toward earning the achievement.

Achievement Types

Let's look at an example achievement type with some data already added, so you can get an idea of what to expect. In this example we're tracking an achievement that's earned when a person has attended ten times consecutively. In later sections we'll go into the details and cover how this all gets set up.

Achievement Type
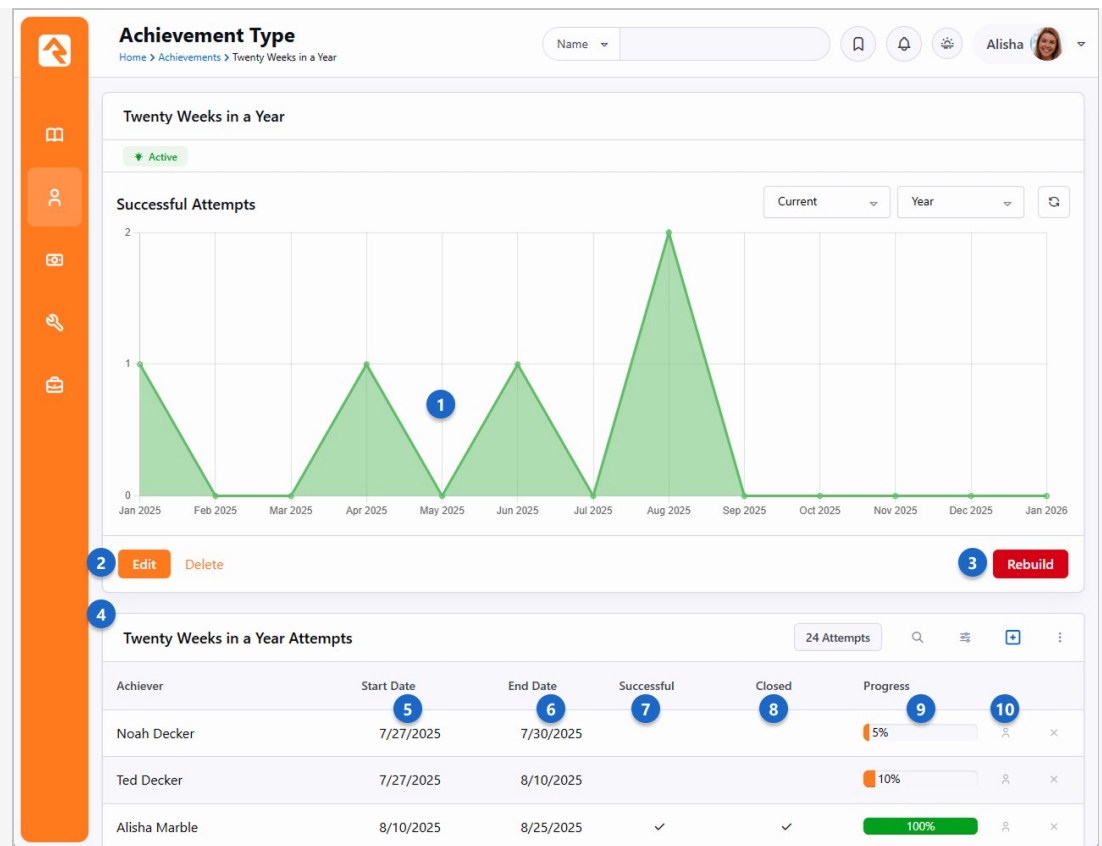
1 **Successful Attempts Graph**
This graph shows the number of successfully completed attempts toward this achievement type. Like other graphs in Rock, you can adjust the timeframe that's displayed. The graph won't appear if there's no achievement data at all, or if there aren't any successful attempts within the selected timeframe.

2 **Edit / Delete**
The achievement type can be edited or deleted using these buttons. You can edit any of the achievement type's setup except for the *Achievement Event*. See the Adding Achievement Types section for full details.

3 **Rebuild**
If you've already read the Individual Rebuild or Streak Type Rebuild sections, then you're familiar with the concept of rebuilding. Achievement types also have a rebuild feature, which works in a similar way. Clicking the `Rebuild` button from the *Achievement Type* page causes attempt data that occurs after a person's most recent successful attempt to be deleted and rebuilt.

4 **Attempts**
Each person's attempts at the achievement type are listed here. This block provides several important details for each attempt, covered in the points below. We'll take a deeper dive into viewing and managing attempts in the Achievement Attempts section below.

5 **Start Date**
This column indicates the date on which the person started the attempt. For instance, if your achievement type requires ten engagements in a row then this would be the date of the first engagement.

6 **End Date**
This column indicates the date on which the attempt ended. For instance, if your achievement type requires ten engagements in a row, then this would be either the date of the tenth engagement or the date on which the streak was broken.

7 **Successful**
A checkmark in this column indicates a successful attempt, which means the person satisfied the conditions of the achievement type. If there's no checkmark here, it either means the attempt wasn't successful (a checkmark appears in the *Closed* column) or is still in progress (the *Closed* column doesn't have a checkmark).

8 **Closed**
An attempt is closed when the person has either succeeded or failed in their attempt at the achievement. For instance, if your achievement type requires three engagements in a row, then the attempt would be closed when the third engagement is registered or when the streak was broken.

9 **Progress**
The progress bar reflects how far along the person is (or was) toward successfully earning the achievement. The percentage complete can exceed 100% if the achievement type has *Allow Overachievement* enabled, which we'll discuss below.

10 **Person Profile**
Simply click this icon to be taken to the person's *Person Profile* page.

Adding Achievement Types

To get started with achievements, navigate to `People > Engagement > Achievements` . You'll be brought to the *Achievement Types* page pictured below.

Achievement Types

From here you can add as many achievement types as you want or look at the attempts for an existing achievement type, as described in the prior section. Let's look at what makes an achievement type work.

Add Achievement Type

1 Name
Provide a name for the new achievement type.

2 Active
The achievements will be tracked only if the achievement type is Active.

3 Description
Some achievement types will be similar, so be sure to provide a description that will help identify what makes this one unique.

4 Category
You can optionally assign a category to help group and organize your achievement types. When creating a new category (`Admin Tools > Settings > System > Category Manager`) for achievement types, be sure to select "Achievement Type" as the entity type.

5 Allow Overachievement
If enabled, this setting allows you to track how much someone has exceeded the conditions of the achievement type. For example, if your achievement type requires someone to attend three times in a row, and if someone attends six times in a row, you'll see that they have 200% progress toward the achievement.

6 Max Accomplishments Allowed
Use this field to limit how many times the achievement can be accomplished. For example, if your achievement type requires someone to attend three times in a row and they attend six times in a row, they can earn the achievement twice. Leave this field blank to allow an unlimited number of accomplishments. This should be set to "1" before enabling *Allow Overachievement.*

7 Icon CSS Class

You can optionally assign an icon to the achievement type, to help distinguish it. This will be used as the achievement's badge icon in most cases (see below for details).

8 Highlight Color

Each achievement type can have a color assigned to it. Currently this setting has no functionality in Rock and would only be used for custom purposes.

9 Achievement Event

Achievements can be earned in several different ways. Here you'll select what kind of event this achievement type will use. This can't be changed after it's saved.

- **Giving: Giving to Account**: Achievements can be earned using giving data. This is an accumulative type of achievement, counting the total number of giving transactions for each person. If this is selected, you'll be prompted to select an Account.
- **Steps: Program Completion**: Select this if you want to have an achievement for someone who has completed all of the Step Types within a specified Step Program. Selecting this will prompt you to specify the Step Program to use.
- **Interactions: Accumulative**: This is used to track achievements based on `Interactions`. You can track the achievement based on a person having any kind of interaction, or you can get more specific by selecting an Interaction Channel and Interaction Component to reference.
- **Streaks: Accumulative**: The achievement is earned by engaging a specified number of times, regardless of whether or not those engagements are consecutive. Use this setting if you want to track that someone has engaged 20 times in a year. Selecting this will prompt you to choose the Streak Type that should be used for this achievement.
- **Streaks: Consecutive**: The achievement is earned by engaging a specified number of times in a row. The key here is that the engagements must be consecutive (i.e., an unbroken streak) to earn the achievement. Selecting this will prompt you to choose the Streak Type that should be used for this achievement.

10 Number to Achieve / Accumulate

The name and function of this field will change according to the *Achievement Event* setting. Think of this as the goal that the person must reach to earn the achievement. In this example the Number to Achieve is set to "10" because this achievement is earned by people who have attended ten times in a row.

If *Allow Overachievement* is enabled, then this number marks 100% progress. If *Allow Overachievement* isn't enabled, then this number marks successful completion of the achievement.

11 Timespan in Days

Provide the number of days in which the number of engagements (*Number to Achieve / Accumulate*) must occur to successfully earn the achievement. For instance, you would set this to "365" if you wanted to track people who engaged a certain number of times within a year.

12 Start Date / End Date

These dates establish boundaries for when events can count toward the achievement type. Events before the *Start Date* or after the *End Date* are ignored. For instance, if you're using achievements to track Step Program completion, only people who completed the Step Program within the provided date range will earn the achievement.

13 Step Configuration

That's right, achievements can be used in step programs. We'll look closely at this area and how it works in the Step Configuration section below.

14 Advanced Settings

In the Advanced Settings you can add *Prerequisite Achievements*, launch workflows, design achievement badges, and adjust settings for check-in celebrations. Check out the Advanced Settings section below for full details.

> **Overachievement and Max Accomplishments**
>
> You can either enable *Allow Overachievement* or set a *Max Accomplishments Allowed* value, but you can't use both. For example, if your achievement type requires someone to attend three times in a row, and if someone attends six times in a row, the system needs to know if the fourth engagement should count toward overachievement or toward a second accomplishment.

Achievement Attempts

Now that the Achievement Type is set up, we can start tracking attempts. Attempts, as you might have guessed, are instances of individuals trying to meet the conditions of the Achievement Type. Although there isn't a formal "status" for attempts, they can be thought of as either successful, unsuccessful or in progress.

If the person satisfies the achievement type's conditions, then the attempt is *Successful*. If the person fails to meet the conditions, then the attempt is not *Successful*. If the person is in the middle of working toward the achievement, then their attempt is in progress.

Even though achievements are automated, you can add or change individual attempts manually from the *Achievement Type* screen. Simply click on the attempt row for a person and then click the `Edit` button. Manual adjustments should be rare but may be needed occasionally due to unusual circumstances or overrides.

1. **Start Date / End Date**
   You can manually change the *Start Date* and *End Date* values for the attempt being viewed or added.

2. **Progress**
   Changes here will be reflected in the progress bar for the attempt. A value of ".5" indicates 50% completion. A value of "1" reflects 100% completion and will count as a successful attempt.

Adding a new attempt is similar to managing an existing attempt. In addition to the fields above, you'll also need to provide the Achiever Id (the Person Alias Id) and the Achievement that the attempt should be applied to.

Step Configuration

No, you haven't jumped to the wrong section in the manual. Rock lets you add step data automatically using achievements. When the achievement has been successfully accomplished, a step gets added. You can access the configuration described below when creating or editing an achievement type.

1. **Add Step on Success**
   The step features for the achievement type will only work if the achievement type has this option enabled.

2. **Step Program**
   Select the step program to which a step should be added. After selecting a step program, the *Step Status* and *Step Type* fields will appear.

3. **Step Type**
   Indicate the *Step Type* that should be added to the person's record.

4. **Step Status**
   Choose the status that should be applied to the step when it's added.

The date on which the achievement was completed successfully will be the date used for adding the step. The date may be used as the step's start or end date, depending on how the step type and achievement type are configured.

The conditions you've configured for your step types will still apply when steps are added from achievements. Steps with prerequisites won't be added if the individual hasn't completed the required prerequisite steps. If an achievement is earned more than once it will only add multiple steps if the step type allows multiple completions.

Advanced Settings

You can access the advanced settings while creating or editing an achievement type. As described below, you can use this configuration to do things like create achievement badges or add prerequisite achievements.

Achievement Type Advanced Settings

1 **Prerequisite Achievements**

You can optionally specify other achievements that must be earned before this achievement can be earned. The other Achievement Type must already be configured in order to be selected.

2 **Workflow Launch**

Achievements can be thought of as having three different states. An individual has either started an achievement, successfully finished it, or failed to finish it. At each of these points you can launch a specified workflow.

3 **Badge Lava Template**

If you provide a template here, it will be used for the badge wherever the badge (of type 'Achievement') is displayed. If there's no template here then the achievement's icon will be used for the badge, except for Step Program Completion which uses the step program's icon. If there is no template here and no icons configured, the default icon is used for the achievement's badge.

4 **Results Lava Template**

Like the badge, you can create a Lava template to display the achievement results elsewhere in Rock. Currently Rock doesn't ship with a dedicated place to display achievement results but stay tuned because we'll be rolling out additional features for this in future releases.

5 **Image**

If you're using this achievement for check-in celebrations, the image you upload here will be shown on the achievement's card when it's displayed on the check-in confirmation page. See the Checking-Out Check-In guide for more details.

6 **Alternate Image**

This setting gives you the ability to associate an image with the achievement type. Currently this setting has no functionality in Rock and would be used for custom purposes only.

7 **Custom Summary Lava Template**

This setting is also for check-in celebrations. This is an advanced feature that lets you replace the default achievement summary with a Lava template of your own. For more details see the Checking-Out Check-In guide.

Sign-Ups

In today's fast-paced world time is a precious commodity, and we often find ourselves looking for ways to make a difference in our community while juggling busy schedules. Fortunately, there are short-term serving opportunities that allow us to give back without committing to a long-term project. Whether it's a food drive or a few hours spent volunteering at a local shelter, every small effort counts towards making a positive impact.

However, organizing these short-term opportunities and managing the logistics of people who are signing up can be a daunting task. The Sign-Ups feature simplifies the process and makes it easier than ever for people to get involved in serving opportunities that align with their passions and availability. That includes addressing a major pain point for many organizations, which is ensuring that thresholds are respected. But best of all, it's easy to set up and start using. But don't think of Sign-Ups as being only for serving projects. This is a flexible tool that has a variety of potential applications.

Sign-Up Walkthrough

Let's start by walking through the sign-up process from the perspective of an online guest. When someone wants to sign up, they'll go to the Sign-Ups Finder page under the Connect area of your external website. From there you can filter the Opportunities, to find the best fit based on date and location. Note that there are many block settings and filter options available here, which we'll look at a little later.

In the results you can see the description, date, time and location of the opportunity. At the bottom of each card, you can register for the opportunity or view additional details. The registration form is short and simple. As pictured below, you can easily register yourself and others.

You'll see a confirmation screen after registering, and that's all it takes. It's a simple way to sign up for something without needing to configure, for instance, an entire event registration template.

Managing Sign-Ups

Before we move on, it's important to become familiar with some terminology.

1. A *Project* is a group and is used to organize other Projects or to house *Opportunities*, which we'll look at next. Projects are one of two types:
   a. *In Person* means the opportunities take place on a specific date and time, like hosting a car wash fundraiser for a day.
   b. *Project Due* means the opportunities are due by the specified date and time, like the deadline for a clothing drive.
2. A person registers for an *Opportunity*, as we saw in the section above. Opportunities are events with a date, time and location.

> ### Sign-Up Group Group Type
> Projects are groups of a type called Sign-Up Group. You can create new sign-up group types by inheriting them from the Sign-Up Group type. We'll cover creating new Sign-Ups group types a little later.

Managing Projects

To access your projects, navigate to `People > Sign-Ups`. On the left are projects, which are organized into a hierarchical tree view. In the below example, Habitat for Humanity doesn't have any opportunities, but is used to group other projects. To the right is a Sign-Up Overview. Here you'll find the schedule and the participant count for each opportunity. The Sign-Up Overview only appears when you first access the page before a project is selected on the left.

At the bottom of the Sign-Up Overview list, you can click *Select Action* to email either leaders or all participants of the selected opportunities. Each person will get one communication, even if they registered for multiple opportunities.

You're able to use the below Lava fields in your Sign-Up Overview communication. Note that we're looping over opportunities because one person can be in multiple opportunities.

Sign-Up Overview Communication Lava Fields

```
{% for opportunity in Opportunities %}
    Project Name: {{ opportunity.ProjectName }}
    Opportunity Name: {{ opportunity.OpportunityName }}
    Address: {{ opportunity.FormattedAddress }}
    Next Start Date & Time: {{ opportunity.NextStartDateTime }}
    Leader Count: {{ opportunity.LeaderCount }}
    Participant Count: {{ opportunity.ParticipantCount }}
{% endfor %}
```

Managing Opportunities

Clicking on a project to the left will display the opportunities for that project to the right. This is where you would come to edit the project, but we'll get to that in the next section. For now, let's see what you can do on this page.

Sign-Up Opportunity Detail

1 **Upcoming/Past**
Flip this toggle to see opportunities whose dates have passed.

2 **Opportunity Details**
The opportunity name, schedule and location are shown for reference. We'll look at how to manage these shortly.

3 **Sign-Ups**
This bar shows how many people are registered compared to the opportunity's minimum, desired and maximum attendance values.

4 **Members**
Click the icon to see a list of everyone who has registered for the opportunity.

5 **Edit Opportunity**
Clicking the icon lets you edit the opportunity, which we cover in the next section.

6 **Add Opportunity**
Add a new opportunity to a project by clicking the button.

Managing Members

Click the ☐ icon to see the people who have registered for that opportunity. In the screenshot below you can see details of the opportunity including the location, schedule and capacity information. You can also come here to add or remove people from the list, or to manage Roles (i.e., Leader, Member).

Sign-Up Opportunity Attendee List
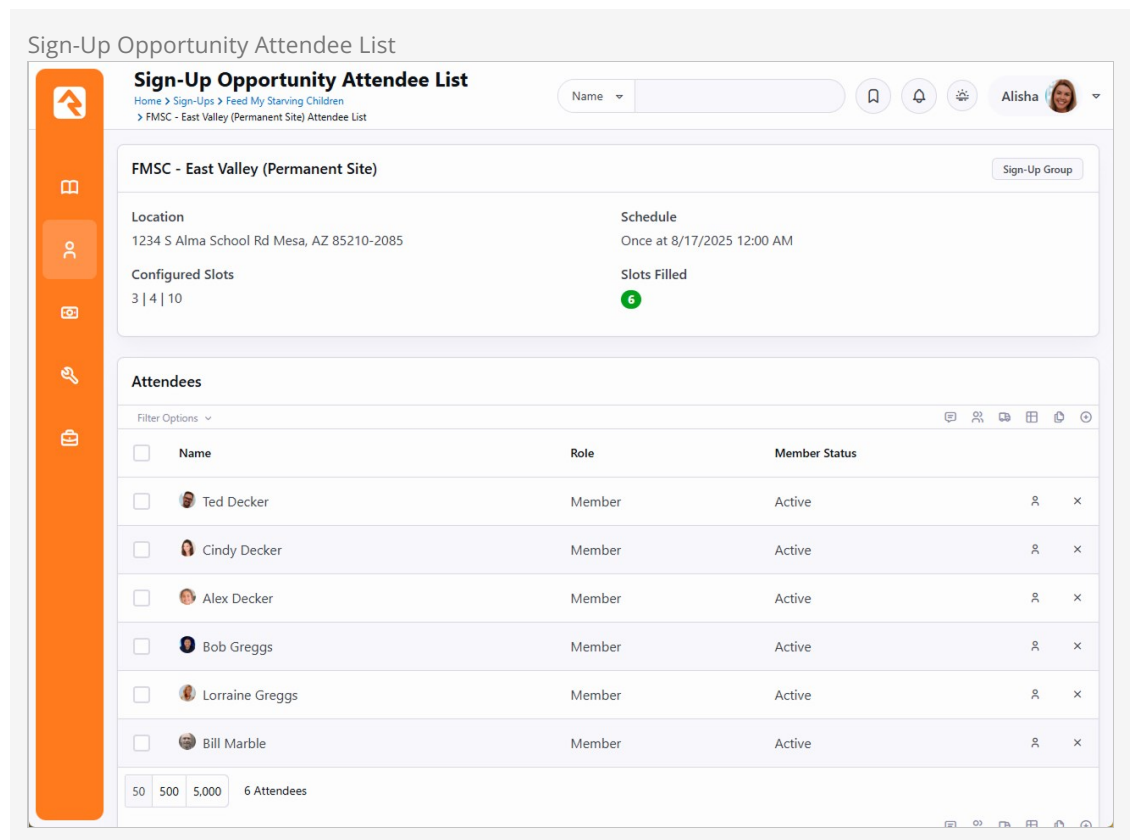
It does feel like you're managing members of a group. The screens and features used to manage the attendee list are generally the same as with members of groups. But do keep in mind that the project is the group, and the opportunities are what people sign up for. So, if you have multiple opportunities under one project, everyone who signs up for any of the opportunities will all be added to the same group.

Configuring Sign-Ups

Now we'll look at the setup that's used to configure Sign-Ups.

Group Types

The first thing you'll need is a group type, and we've got one ready for you. The *Sign-Up Group* group type is used by Rock, so editing is limited, but many features are available.

There are too many group type configuration options to cover here (check out the `Rock Your Groups` manual) but you might edit this group type to add group requirements or attributes. If you're using group requirements, individuals will need to be logged in so Rock can determine if they meet those requirements.

You could also work with more than one group type in Sign-Ups. This way you can leverage different features depending on the Sign-Up scenario. However, there are a couple special steps you'll need to take:

1. Your new sign-up group type needs to have its *Inherited Group Type* value set to "Sign-Up Group" before proceeding.
2. Then you'll need to add your new group type to *Allowed Child Group Types* in the configuration for the original "Sign-Up Group" group type.
3. Your new group type needs to have *Group Schedule Options* selected (e.g., Custom, Named). Also, ensure at least one *Location Selection Mode* is chosen (e.g., Named, Address).
4. By default, the public *Sign-Up Finder* block is only configured to show Opportunities for the original

"Sign-Up Group" that ships with Rock. You'll have to edit the block's settings to show other Project [Group] Types.

Project Configuration

Projects are created and managed from `People > Sign-Ups`. Click a project from the tree menu on the left, then click the `Edit` button.

Sign-Up Project Detail

1 Project Name

This will be the name of the project/group and will be seen by people visiting your site.

2 Description

You'll want to put some thought into a good description. The description is displayed publicly and will influence whether someone signs up.

3 Group Type

For a new project, select which group type to use. Only Sign-Up Group, or group types inherited from Sign-Up Group, will be listed.

4 Campus

Like other types of groups, you can assign the project to a campus. People can filter opportunities by campus using the Sign-Ups Finder.

5 Project Type

In-Person project types occur at a specific time and place, so people can be reminded about it as the date approaches. *Project Due* project types typically span time, so they have a deadline for completion rather than a single upcoming event.

6 Reminder Settings

If the project type is In-Person then you can choose which communication template to use for the reminders, and how many days in advance the reminders should be sent. You can also provide details that will be added to the reminder communication.

7 Confirmation Details

A communication is sent to the person when they register. The content you add here will be added to that communication.

8 Group Member Attributes

Any Group Member Attributes that have been configured at the Group Type level (e.g., Sign-Up Group) will appear as shown here. As noted on the screen, people will be able to set values for these attributes via the Sign-Up Register block if the block is in *Anonymous* mode and if the attribute is marked as *Public*.

Setting up Opportunities

With your projects in place, you're ready to start adding opportunities to them. Remember, an opportunity is what the person registers for, so this is where you'll set the schedule, location and attendance goals.

1 **Schedule**
You can choose either a custom schedule or a named schedule. People can filter on named schedules in the Sign-Ups Finder. What the date and time represent depends on the project type for this opportunity.

2 **Location**
Provide a named location or an address. This is required and is seen publicly.

3 **Attendance**
Here is where you'll set the minimum, desired and maximum people needed for the opportunity. You can use one, two or all of these options.

4 **Reminder Details**
This won't be available if the opportunity has a project type of Project Due. The content you add here will be appended to the reminder email for the opportunity.

5 **Confirmation Details**
A communication is sent to the person when they register, and the content you provide here will be added to that communication.

Send Reminders System Job

Rock ships with a job called *Send Sign Up Reminders* that runs daily at 8am. There isn't anything you need to configure with this job but be aware that reminders won't be sent until it runs.

Send Sign Up Reminders

Sign-Ups Finder Block Settings

The public-facing block that's used to search opportunities has several settings you'll want to know about. Adjust these settings to change how the person interacts with the Sign-Ups Finder, and what filtering options are available to them.

Sign-Up Finder Block Settings

Schedule Filters

(13) Display Named Schedule Filter ⓘ
☐

(14) Named Schedule Filter Label ⓘ *
Schedules

(15) Root Schedule Category ⓘ
📁   ▾

Location Filters

(16) Display Location Sort ⓘ
☑

(18) Location Sort Label ⓘ *
Location (City, State or Zip Code)

(17) Display Location Range Filter ⓘ
☑

Additional Filters

(19) Display Date Range ⓘ
☑

(20) Display Slots Available Filter ⓘ
☑

Lava

(21) Results Lava Template ⓘ *

```
1  {% assign projectCount = Projects | Size %}
2  {% if projectCount > 0 %}
3      <div class="row d-flex flex-wrap">
4          {% for project in Projects %}
5              <div class="col-xs-12 col-sm-6 col-md-4 mb-4">
6                  <div class="card h-100">
7                      <div class="card-body">
8                          <h3 class="card-title mt-0">{{ project.Name }}</h3>
9                          {% if project.ScheduleName and project.ScheduleName != empty %}
10                             <p class="card-subtitle text-muted mb-3">{{ project.ScheduleName }}</p>
11                         {% endif %}
12                         <p class="mb-2">{{ project.FriendlySchedule }}</p>
13                         <div class="d-flex justify-content-between mb-3">
14                             {% if project.AvailableSpots != null %}
```

(22) Results Header Lava Template ⓘ

```
1  <h3>Results</h3>
2  <p>Below is a listing of the projects that match your search results.</p>
3  <hr>
```

Linked Pages

(23) Project Detail Page ⓘ *
📄 Sign-Up Detail (signups/{ProjectId}/location/{LocationId}/schedule/{Sc...   ✕ ▾

(24) Registration Page ⓘ *
📄 Sign-Up Register (signups/register/{ProjectId}/location/{LocationId}/sc...   ✕ ▾

[Save] Cancel

---

① Hide Overcapacity Projects
If an opportunity is full, you might not want to show it on your website.

② Load Results on Initial Page Load
When you first come to the page should opportunities be shown or do people need to search first?

③ Display Project Filters As
Certain filters can be displayed as either checkboxes or a drop-down menu.

④ Filter Columns
You can change the look of the Sign-Up Finder by changing how many columns the filters should be divided into.

⑤ Project Types
Here you can choose which sign-up group types to show. This is useful if you have multiple sign-up group types.

⑥ Display Attribute Filters
If you have group attributes configured, then you can use them as filters.

⑦ Project Type Filter Label

If you're filtering on project types (group types) you can change the label of that filter.

8 Display Campus Filter
Simply choose whether the person can filter by campus.

9 Hide Campuses with no Sign-Up Opportunities
Assuming you're showing campuses, this allows you to prevent the person from seeing or selecting a campus that has no opportunities.

10 Enable Campus Context
The opportunities can be filtered automatically based on a campus selection if the page has campus context. You can read more about context in our `Designing and Building Websites` manual.

11 Campus Types/Statuses
You can restrict which campuses are shown. For instance, you may only want to show Physical campuses that are Open.

12 Selectable Campuses
If you find the other options don't meet your needs, you can manually choose which campuses the person is able to select.

13 Display Named Schedule Filter
You can configure opportunities to use a Named Schedule, in which case you can filter those opportunities based on their schedule.

14 Named Schedule Filter Label
If you are filtering on named schedules, you can call them something else.

15 Root Schedule Category
You may only want to show opportunities with schedules under a certain category.

16 Display Location Sort
If the person provides location information, like a zip code or city and state, the results will be sorted based on their proximity to the location.

17 Display Location Range Filter
This determines whether the person can filter on the distance to the opportunity. The provided location is used, or if a location isn't provided and the person is logged in then their address will be used.

18 Location Sort Label
Here you can provide guidance on what the person should put into the location sort field.

19 Display Date Range
Leave this on to let people filter opportunities based on their dates.

20 Display Slots Available Filter
Enable this to let people filter opportunities according to their available space.

21 Results Lava Template
This is an advanced setting that lets you customize how the opportunities are displayed in the Sign-Ups Finder.

22 Results Header Lava Template
Similar to the above setting, you can use Lava to customize what the page says below the Results header.

23 Project Detail Page
When someone clicks on the Details link for an opportunity, they'll be taken to the page you provide here.

24 Registration Page
When the person signs up, this is the page they'll be taken to when they click the `Register` button.

Registration Block Settings

You have some options when it comes to the person's experience when they register for an opportunity. You'll want to review these settings to ensure they meet the needs of each opportunity.

The goal is to craft the experience you desire for the specific ministry need. In addition to the settings below, don't forget to review the Sign-Up Finder settings detailed above. These settings, combined with the Project Type, significantly influence how people interact with sign-ups.

Registration Block Settings

1 **Mode**
There are three modes in which the block can be.
- **Family:** You'll see a list of family members and you can check the box next to each one you want to register. The person must be logged in to identify family members. If the person isn't logged in, they'll be processed in Anonymous mode.
- **Anonymous:** This is the default mode. The person doesn't need to be logged in, but their information will be filled in for them if they are. Additional people can be added by providing their name and information.
- **Group:** Group mode is used when signing up people from a group. For instance, you might want to register your bible study small group for a day of serving. See details in the next section below.

2 **Include Children**
When the block is in Family mode, can children in the family be registered? In Group mode, this option will display children of group members.

3 **Workflow**
When the sign-up is complete you can optionally launch a workflow. Use the info icon to see what gets passed to the workflow.

4 **Registrant Confirmation System Communication**

Confirmation emails are sent to each registrant, except in Family mode. In Family mode the confirmation only goes to the adults, although a child gets one if they did the registration.

⑤ **Require Email/Mobile Phone**
You can require an email and phone number to ensure good communication with the registrant.

⑥ **Connection/Record Status/Record Source**
If a new person record is created in Rock through Sign-Ups, this is where you set which *Connection Status* and *Record Status* should be used. If a new person record is created and you want to track its origin to **'Sign-up'**, then select it in the *Record Source*

Confirmations and Reminders Using SMS

By default, the "Sign-Up Group Registration" and "Sign-Up Group Reminder" System Communications will be sent using SMS text messaging in addition to email. You'll need to add your organization's phone number to the configuration located at `Admin Tools > Settings > Communications > System Communications`. Without your phone number in place, system errors will occur when attempting to send these communications.

Group Registration and Attendance

Now that you're familiar with projects and opportunities, let's change the scenario from what we saw at the start of this chapter. In this section we'll cover how to use sign-ups for groups and how to take attendance for sign-up events.

Group Registration

As we saw in the prior section, the Sign-Up Register block has three modes. When it's set to Group mode then people can be signed up from an existing group. This takes a few steps to set up, but we'll walk you through it.

First, we need to talk about Id Keys. The Sign-Up Register block needs to know what you're signing up for. It needs to know the project, the location and the schedule. Normally we would pass in the Id's for those entities from the URL. But with sign-ups, we're going to need the IdKey instead of the Id. The IdKey is an alphanumeric string of characters that represents the Id. For instance, an entity with an Id of 4 has an IdKey of "da0BJvBpzX".

You're going to need a new page to house the Sign-Up Register block set to Group mode. As you're setting this page up give it a route with parameters. The easiest way is to copy the route from the sign-ups registration page that ships with Rock, change the route names, and add a parameter for GroupId. The route for your registration page might look like:

```
signup-group/{ProjectId}/location/{LocationId}/schedule/{ScheduleId}/group/{GroupId}
```

Then, all you need to do is use Lava to generate the IdKey for each entity. There is a property on each of these entities called "IdKey" and you'll need to use Lava to access it. If you want to find the IdKey for a group, you might use Lava like the below:
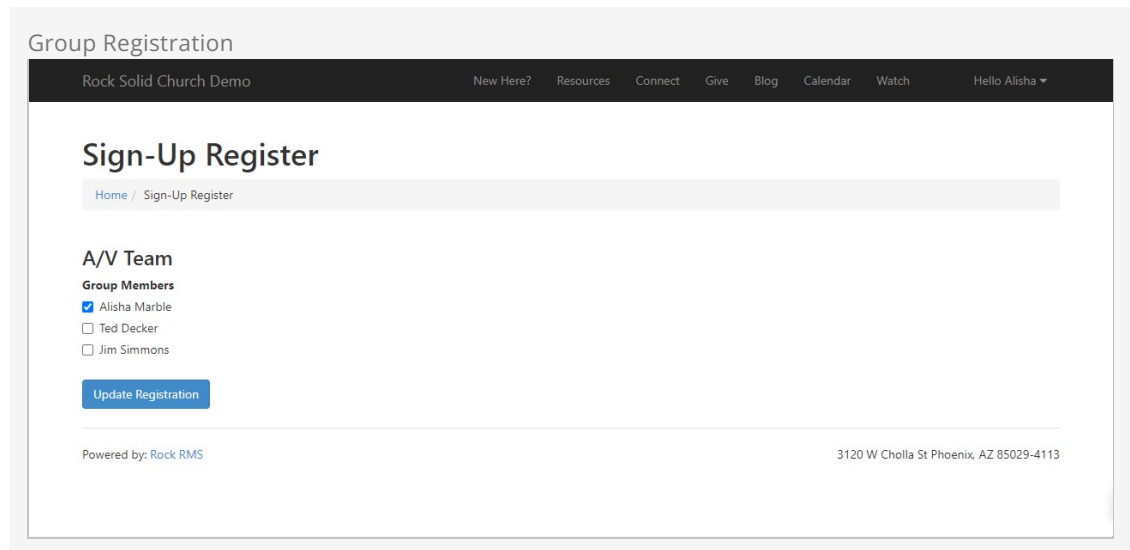
```
{% group Id:113 %}
{% endgroup %}

    {{ group.IdKey }}
```

Note that the ProjectId is the IdKey for the sign-up group. In the end your URL would look like:

```
yourchurch.org/signup-group/7QVlZ89BZW/location/KewldO1moa/schedule/Dx9l4aPaEX/group/7oWlzzdljq
```

Anyone who is in the group can use this link to register themselves or others for the given project.

Taking Attendance

Taking attendance for a sign-up group works similarly to the Group Registration process described above. You'll need to build a URL, and then that URL can be used to take attendance.

You'll need a page with the Sign-Up Attendance Detail block. Rock ships with one under the route of signups/attendance. Instead of the GroupId, we'll be passing in the Attendance Date. So, your URL will look like:

```
signups/attendance/{ProjectId}/location/{LocationId}/schedule/{ScheduleId}/attendancedate/{AttendanceDate}
```

The Send Attendance Reminder job uses the Group Attendance Reminder system communication. But you'll have to set up the link in that email to look something like this:

```
{% capture attendanceLink %}
    {{ 'Global' | Attribute:'PublicApplicationRoot' }}signup/attendance/{ProjectId}/location/{LocationId}/sch
edule/{ScheduleId}?AttendanceDate={{ Occurrence | Date:'yyyy-MM-dd' | EscapeDataString }}
{% endcapture %}
```

Note the date formatting above. If you're building a link directly to the page, the date should be formatted in that way:

```
yourchurch.com/signups/attendance/7QVlZ89BZW/location/KewldO1moa/schedule/Dx9l4aPaEX/attendancedate/2023-08-26
```

Once you arrive at the page all you need to do is mark who is present and save.

Sign-Up Permissions

Managing security permissions within Sign-Ups can seem challenging at first. But don't worry, we're going to break it down so you can see what permissions a person needs to perform various functions, and where to set them up.

First, we'll look at the places where permissions are set up. Sign-Up permissions are granted in one of three ways:

- **Group Role Permissions:** People in the group with a role of Leader will have additional permissions. This is controlled at the Group Type level. Out of the box, the Leader role for groups of type "Sign-Up Group" has *Edit* and *Manage Members* permissions. See the Rock Your Groups manual for more information on configuring group roles.

Sign-Up Group Type Roles

- **Project Permissions:** Some people, like Rock Administrators, will have access to project-level permissions. We'll dive into the details shortly, but for now just be aware that permissions can be granted to individual Users or Security Roles at the project level.

Project Permissions

- **Group Type Permissions:** Similar to what you'll find when looking at the above project-level permissions, you can grant permissions from the group type itself by clicking the padlock icon as shown below. You can grant permissions to *Manage Members*, *Edit*, *Administrate*, and *Schedule*.

Group Type Permissions

Some permissions overlap (e.g., *Edit* and *Manage Members*) between group role permissions and group type security. This means *Edit* access can be given via a Leader role, or via a system Security Role. To simplify things, we'll use the phrase "group type level" to refer to both role and security settings since they're configured in the same area.

Next, we'll dive in to what happens when you set up the permissions described above. We'll use Ted Decker as our project Leader, who has access to Rock but does not have full Rock Administration permissions. We'll go through the Sign-Ups area from Ted's perspective using out-of-the-box permission configurations.

Delete Project

Permissions to Delete Projects

1 Can Delete
There are three projects that Ted can delete. He can delete them because he's a Leader of at least one project under the "Feed My Starving Children" group. Leaders have *Edit* permission, which allows them to delete.

2 Missing Permission
Ted cannot delete the third project in the list because he is not a Leader in any "Habitat for Humanity" projects. This also means he (or one of his security roles) hasn't been granted *Edit* security at the project or group type levels.

Note that *Edit* isn't the only permission that lets you delete. Security Roles or Users who have been granted *Schedule* permission can also delete.

Change, Remove, and Secure projects

Project Permissions

1. **Update Projects**
   To enable the ⬜(edit), ⬜(delete), and ⬜(add) icons, permission to either *Edit* or *Schedule* needs to be granted at either the project or group type levels.

2. **Edit and Delete**
   To enable these buttons, grant *Edit* permission at the project or group type levels.

3. **Project Security**
   As shown in a prior screenshot above, this is where the ⬜(security) icon would appear only if the person has been granted *Administrate* permission at the project or group type levels. In our example, neither Ted nor his security roles have *Administrate* permission, so he can't see the icon.

Managing Attendee List

To add or remove attendees from the list, the person needs either *Manage Members*, *Edit*, or *Schedule* permissions at the project or group type levels.

Attendee List Permissions

Add/Remove Attendees

The ☐ (add) and ☐ (remove) icons will only be visible and clickable if the person has one of the permissions listed above.

Adding Sign-Up Groups

There are two ways to add sign-up groups to the list. You can add a child group to an existing group, or you can start a brand new sign-up group by adding to the top-level of the list. There's extra security needed to add top-level sign-up groups, which we'll cover below.

If you want to add new top-level sign-up groups to the list, you'll need to update the security on the block itself as well as on the Sign-Up Group *Group Type*. Similar to above, this requires *Edit* permission.

Block Security

Users or Roles who are allowed to add top-level sign-up groups will need *Edit* permission in the Sign-Up Groups block security and the Sign-Up Group *Group Type*.