

Volunteer Onboarding Dotting I's and Crossing T's

Presentation Takeaways

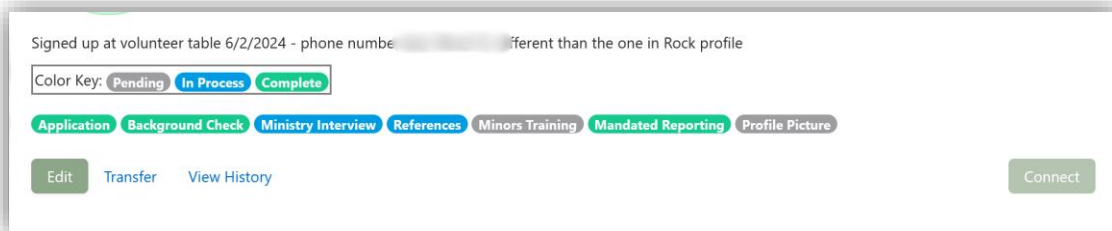
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Bubble Key



Details

The Bubble Key is displayed on Connection Request Board block and the Connection Request Detail block. This code is in the 'Lava Badge Bar' section of the Block Settings. You can put the code in directly, or 'include' a .lava file. The file include is recommended, since you can then update the code as needed in one place (the file) and it will update in both locations where it is displayed.

Code Description

Reading through the code, you can see that it does the following:

- Verifies that we are looking at a 'Volunteering' connection.
- Displays the color key.
- Sets all bubble to gray (Pending).
- Loops through all Connection Request Activities and marks any bubbles as 'In Process' as needed. It evaluates the Activity names for this.

- Loops through all Connection Request Activities and marks any bubbles as 'Complete' as needed. It evaluates the Activity names for this.

The Code

```
//- ConnectionTypeId of 8 = Volunteering
{% if ConnectionRequest.ConnectionOpportunity.ConnectionTypeId == 8 %}
  <div style="border: 2px solid gray; display: inline-block; padding: 0.1rem; margin-bottom: 1rem;">
    Color Key:
    <span class="badge" title="Pending" >Pending</span>
    <span class="badge badge-info" title="In Process">In Process</span>
    <span class="badge badge-success" title="Complete">Complete</span>
  </div>
  <br>

  {% assign applicationClass = "badge" %}
  {% assign backgroundcheckClass = "badge" %}
  {% assign ministryinterviewClass = "badge" %}
  {% assign referencesClass = "badge" %}
  {% assign minorstrainingClass = "badge" %}
  {% assign mandatedreportingClass = "badge" %}
  {% assign profilepictureClass = "badge" %}

  {% connectionrequestactivity where:'ConnectionRequestId == {{ConnectionRequest.Id}}' %}
  {% for cra in connectionrequestactivityItems %}
    {% case cra.ConnectionActivityType.Name %}
      {% when 'Application Requested' %}
        {% assign applicationClass = "badge badge-info" %}
      {% when 'Background Check Requested' %}
        {% assign backgroundcheckClass = "badge badge-info" %}
      {% when 'Ministry Interview Requested' %}
        {% assign ministryinterviewClass = "badge badge-info" %}
      {% when 'References Requested' %}
        {% assign referencesClass = "badge badge-info" %}
      {% when 'Minors Training Requested' %}
        {% assign minorstrainingClass = "badge badge-info" %}
      {% when 'Mandated Reporting Requested' %}
        {% assign mandatedreportingClass = "badge badge-info" %}
      {% when 'Profile Picture Requested' %}
        {% assign profilepictureClass = "badge badge-info" %}
    {% endcase %}
  {% endfor %}
  {% for cra in connectionrequestactivityItems %}
    {% case cra.ConnectionActivityType.Name %}
      {% when 'Application Complete' %}
        {% assign applicationClass = "badge badge-success" %}
      {% when 'Background Check Complete' %}
        {% assign backgroundcheckClass = "badge badge-success" %}
      {% when 'Ministry Interview Complete' %}
        {% assign ministryinterviewClass = "badge badge-success" %}
      {% when 'References Complete' %}
        {% assign referencesClass = "badge badge-success" %}
      {% when 'References Not Required' %}
        {% assign referencesClass = "badge badge-success" %}
      {% when 'Minors Training Complete' %}
        {% assign minorstrainingClass = "badge badge-success" %}
      {% when 'Minors Training Not Required' %}
        {% assign minorstrainingClass = "badge badge-success" %}
      {% when 'Mandated Reporting Complete' %}

```

```

        {% assign mandatedreportingClass = "badge badge-success" %}
        {% when 'Mandated Reporting Not Required' %}
            {% assign mandatedreportingClass = "badge badge-success" %}
        {% when 'Profile Picture Complete' %}
            {% assign profilepictureClass = "badge badge-success" %}
        {% endcase %}
    {% endfor %}
{% endconnectionrequestactivity %}

<span class="{{applicationClass}}">Application</span>
<span class="{{backgroundcheckClass}}">Background Check</span>
<span class="{{ministryinterviewClass}}">Ministry Interview</span>
<span class="{{referencesClass}}">References</span>
<span class="{{minorstrainingClass}}">Minors Training</span>
<span class="{{mandatedreportingClass}}">Mandated Reporting</span>
<span class="{{profilepictureClass}}">Profile Picture</span>
{% endif %}

```

Connection Type Configuration





























Our ‘Volunteering’ Connection Type is where we created all of the ‘Activities’ available for a Connection Request.

Our complete list of Activities:

- _Called
- _Called Left Message
- _Called No Answer
- _Comment
- _Email
- Application Complete
- Application Requested
- Background Check Complete
- Background Check Requested
- Mandated Reporting Complete
- Mandated Reporting Not Required
- Mandated Reporting Requested
- Ministry Interview Complete
- Ministry Interview Requested
- Minors Training Complete
- Minors Training Not Required
- Minors Training Requested
- Profile Picture Complete
- Profile Picture Not Required
- Profile Picture Requested
- References Complete
- References Not Required
- References Received
- References Requested

Activities
Activities
_Called
_Called Left Message
_Called No Answer
_Comment
_Email
Application Complete
Application Requested
Background Check Complete
Background Check Requested
Mandated Reporting Complete
Mandated Reporting Not Required
Mandated Reporting Requested

We then have Workflows that are triggered by the Activities as needed.

Workflow Type	Trigger		
Triggered on New Volunteering CR	Request Started		
Application Requested from CR	Activity Added		
Background Check Requested from CR	Activity Added		
References Requested from CR - with SMS	Activity Added		
Minors Training Requested from CR	Activity Added		
Mandated Reporting Requested from CR	Activity Added		
Profile Picture Requested from CR	Activity Added		
Ministry Interview Requested from CR	Activity Added		
CR Connected - Set Volunteer Anniversary Date and Email Involvement	Request Connected		
Application Complete from CR	Activity Added		
References Received from CR	Activity Added		
Minors Training Complete or Not Required from CR	Activity Added		
Minors Training Complete or Not Required from CR	Activity Added		
Triggered on New Volunteering CR	Request Transferred		

How Workflows Interact with Connection Requests

When a new connection request is created and triggers a workflow, or when a Connection Request Activity triggers a workflow, an 'Entity' object is passed in to the workflow. This object is available to the first workflow activity and can be queried to get various details about the connection request. Let's look at a few examples.

Triggered on New Volunteering CR workflow

This workflow gets triggered when a new connection request is created. The workflow has various attributes that can hold information about the connection request. In the first Activity of the workflow, you can access the Object passed-in to populate these attributes. Here are some of the attributes and how they get populated in this workflow:

- TheCR: this attribute is of type 'Connection Request'. I use an 'Attribute Set from Entity' workflow action to set this. Make sure you are using the Guid, not the Id.
- If you need the Id, you can use the same 'Attribute Set from Entity' action and use a Lava Template of: `{{ Entity.Id }}`.
- I also get the Connection Opportunity Name, using the same action with the Lava Template of: `{{ Entity.ConnectionOpportunity.Name }}`.
- To get the Requester – the person who created the connection request, use `{{ Entity.PersonAlias.Guid }}` in your Lava Template.
- Likewise, you can get the assigned Connector with: `{{ Entity.ConnectorPersonAlias.Guid }}`.

For workflows that are triggered by a Connection Request Activity, the syntax is a bit different. The object passed in to the workflow has a similar structure, however, so the change isn't too dramatic.

- To get the Connection Request in this case, use: `{{ Entity.ConnectionRequest.Guid }}`.
- To get the Requester, I use:

```
{%- assign cr = Workflow | Attribute:'TheConnectionRequest','Object' -%}
{{- cr.PersonAlias.Guid -}}
```

Sometimes it is difficult to know the structure of the Object that is passed in to a workflow. One of the ways I will explore the structure of this object (so that I know how to use it), is to create an attribute of type Memo, then use the Set Attribute From Entity action and use the Lava code `{{ Entity | ToJSON }}`

This will put the object into the attribute in JSON notation. You can then look at this to see how it is structured and where your desired data resides within the object.