



# Group Connect – the Leader Experience



## General Information about Group Connect – for Leaders

Group Connect is a group management tool built into Ministry Platform ideally used for groups of 50 or less. It allows leaders AND members interact with ministry platform in a user-friendly way. Currently, the tool is called Group Life. In 2025, it will be rebranded as Group Connect.

### **⚠ Important Notes:**

- Group Connect is the easiest way for group leaders to take attendance which takes that weight off the DRE's. It is also great for tracking RSVPs in adult groups.
- Using Group Connect from a mobile device is a great way to allow catechists and group leaders to mark attendance during the event or after the event ends.
- Once a group is available online, it will appear in the Group Finder widget. The **Group Finder widget shows** groups that are available online and currently accepting new participants through sign-ups or inquiries. If you want to set the group so it will appear in **Group Connect** but not in the **Group Finder**, set the field **Group is full** to **Yes**.

**Features of Group Connect for Leaders:** (Note: The use of the word "leader" in the list below refers to leaders of adult groups as well as Catechists for Faith Formation classes.)

1. Schedule activities.
2. Communicate with the entire group or specific participants.
3. Add or remove participants
4. View all groups they manage or to which they belong in one place
5. View their roster including member's contact info, start date and privacy settings.
6. Add or remove participants AND edit their contact information.
7. See information about all upcoming group activities - including where they meet, dates/times of events, duration and frequency.
8. Take attendance
9. Communicate with ADULT group members. Communication can be via email or text if you've subscribed to the text service through the diocese. (**Note:** Group members can only chat with one another through PocketPlatform's Group Chat feature. Contact Kathy Papalia to get the free app for your parish.)
10. see and respond to group membership inquiries.
11. track RSVPs.

## Configuring a group to appear in Group Connect (This is done in the platform)

1. Note: Anyone planning to take attendance (DRE or Catechist) must be in the Group with the **Group Role Type** set to **Leader**.
2. Click **Groups** and click the name to open the Group
3. Set these fields:
  - a. **Available Online=Yes** (Group will appear in Group Connect and Group Finder)
  - b. **Available on App=Yes.** (Group will appear in app)
  - c. **Send attendance=Yes.** (alerts the group's Primary Contact that attendance is outstanding)
  - d. **Create Next Meeting=Yes** (Creates new meeting after one ends - Not for Reled classes)

4. Do you want new members to inquire about joining the group?  
**YES:** change the group size and set Group is Full to no.  
**NO:** Set Group is full to Yes.
5. Add these people to the group
  - a. The **Primary Contact** should be your DRE or someone in charge of the group.
  - b. Anyone taking attendance should have the **Group Role = Group Leader**.

### Logging into Group Connect (5 ways)

1. Log into **Group Connect** from your PC or your mobile device:  
<https://eriercd.cloudapps.ministryplatform.cloud/apps/grouplife>
2. Click the fOpen the parish portal, click the [My Groups](#) button and click the groups Group Life button
3. Open [PocketPlatform](#) and click the **Group Life** link in the navigation menu.
4. Scan the QR code. Print a QR code Catechists can scan at the beginning of each class to quickly get into Group Connect. A full-size qr code is on page 6 of this document.

### ⚠ Important Notes:

- PC users, create a favorite/bookmark. Mobile users, add it to your device's home screen
- **The leader can NOT have the same email address as any other contact in MP.**
- It also may take up to 30 minutes) for groups to show up for the first time for a leader.
- BOTH the group's Primary Contact AND any Group Leaders must have a user account. Create an account by visiting <http://www.eriercd.org/portal.html> or using the parish portal link found on the parish website.

### Attendance tab

**Every group leader should take attendance** Following up on consistent absences could reveal family or health issues or dissatisfaction with the group that could be affecting their engagement with the parish. Follow up is key to improving parishioner connection to the parish and their faith

⚠ **Pro tip:** Give your catechists a QR code they can scan at the beginning of every class. This is a quick way to get them into Group Connect to take attendance.

**For cancelled events:** You can indicate that a class did not meet on a particular date by opening that event date and selection **More** and then **Did not Meet**.

### Taking Attendance:

1. Click the group name to open it and click the **Attendance** tab. (It will default to the current event or the most recently ended event. You can take attendance for an activity that happened in the past 14 days or is currently in progress.)
2. Check mark everyone who attended the event and add any notes. If everyone attended, select the checkbox at the top of the list to mark all participant checkboxes.
3. Click the **Mark Attendance** button in the upper right corner. The participant's status will change from - - to **Present** or **Not Present**. You don't have to mark them as absent.
4. If your group allows guests, you can use the + or – next to **Guests** in the **Detailed Attendance** box in the upper right corner. (You can also click the **Add a Participant** button on the **Attendance** tab if a guest indicated they wanted to become a permanent member.)

### The My Groups menu option

This is a list of group to which I belong as well as group for which I have the Group Leader role.

When you click the name of a group, you will see the group's home page.

## The Info tab.

**Editing basic group information:** Open a group and click the **Edit** button, to edit the following. Do not edit Religious Education classes in Group Connect. Use the platform instead.

- Group Name – cannot be changed in Group Connect. Must be edited in the platform
- Meeting Day
- Meeting Time
- Meeting Duration
- Meeting Frequency
- Description
- Target size.

## The Participant tab

**Why is participant contact information grayed out:** This indicates the group member has chosen not to share their contact information. This is gray to remind Group Leaders they shouldn't share the information either.

### **Filtering Members**

1. Click the group name to open it and click the **Participants** tab.
2. Click the **Filter** button in the upper right corner.
3. Select a **Role Type**
4. Click **Save**.

**Adding a participant.** If the person is already a member of the parish, you can add them to the group through Group Connect. If this is a new parishioner, they should be added through the platform using the **Add/Edit Family tool**. Adding a new parishioner through Group Connect right now will cause the parishioner to be added to the Diocese congregation instead of your parish. **This glitch will be fixed in the near future.**

1. Click the group name to open it and click the **Participants** tab.
2. Click the + **Add Participant** button.
3. Type in the name and contact information. (If they exist contact, it will find their contact.)
4. Click the **Save** button.

### **To remove a participant**

1. Click the group name to open it and click the **Participants** tab.
2. check mark a specific participant.
3. Click the **Select an action** button and choose **Remove**.
4. Record a reason for removal in the group participant notes.

### **Editing a participant's information** (You can also remove someone.)

1. Click the group name to open it and click the **Participants** tab.
2. Click the **More (...)** button next to their name and choose **Edit**.
3. Update the information as needed and click the **Save** button.

## **Communicating with members**

### **Sending a message - ⚠ For groups containing children:**

1. Log into Ministry Platform.
2. Locate your group and click on the name to open it.
3. Click the **Member** tab.
4. Check for previously selected contacts. These are known as "sticky selections"
5. Click the downward pointing triangle next to **All Records** at the bottom of the screen.
6. Click **Current/Unsaved Selections** if it exists and click the **Circled X** next to it. (If it doesn't exist continue to next step)
7. Select members using their check box or the select all checkbox in the lower left corner..
8. Click **Actions** button in the upper right and choose Message
9. Check the **Send to Parents** check box
10. Complete the **Subject** and **Body** of the email.
11. Click the **Send** button in the lower right corner and click the **Send** button again.
12. Uncheck the participants using the check box in the lower right corner.

### **Sending a message - For groups containing adults:**

**Note:** When sending a message to a group, you can sort the Recipients list by first or last name. This is useful for finding people in larger groups.

1. Open **Group Connect**.
2. Click the group name to open it and click the **Participants** tab.
3. Select all members using the check box in the upper left corner. (Or just check mark specific participants.)
4. Click the **Select an action** button and choose **Send Message**
5. Put a dot next to **Email** to send an or next to **Text Message** if your parish has paid for the texting option through the Diocese (Contact Kathy Papalia for more about texting.)
6. Complete the **Subject Line** (for email) and body of the message.
7. Optionally you can drag and drop files or click to upload a file
8. Click the **Send** button in the lower right corner.

## Group Inquiries tab

If you have groups that are available online that are not full, individuals can inquire about joining your groups through the Group Finder widget.

**Checking Sign-ups** Click the group name to open it and click the **Sign-ups** tab. (You will have a numeric indicator if someone has inquired.)

1. Open their inquiry.
2. Click the **Select an option** button and choose either **Admit** or **Decline** entry. You can also use the **More (...)** button at the right side of their row.
3. You will also see questions under the **comments** column.

## The Activities tab

**Reviewing event information:** Click either the **Upcoming Activities** or **Past Activities** buttons to see

- Event Time/Date information
- Event RSVP count.
- Click the carrot at the end of the row to see additional information

**Cancelling an event** (**Do not** cancel an event if it is part of several events happening at the same time. This includes Faith Formation classes. If you do, you will cancel all of the classes.

1. Click the group name to open it and click the **Activities** tab.
2. Click the **More (...)** button at the end of the row for the event you wish to cancel.
3. Choose **Cancel**.

**Adding new events** (Giving leaders the ability to add events can be enabled or disabled. If the group is configured with the **Create Next Meeting** field set to **Yes**, MP will create the next meeting each week for you. It only creates one at a time so the event list isn't long. It honors the cadence set up for the group. This does not reserve the room if you use MP for facilities.)

**These instructions should not be used for groups that meet at the same time – like religious Education /Faith Formation meetings.** For those types of meetings, use the Creating an Event instruction found here: <https://www.eriercd.org/mpt2.html#groups>

1. Click the group name to open it and click the **Activities** tab.
2. Click **Add Activity**
3. Complete the **Event** details and click **Save**.



# Group Connect – the Member Experience



## Group members can use Group Connect to

- See the list of groups to which they belong and groups they manage.
- See information about group and group events
- See contact information for other group members according to privacy settings.
- Set their own privacy settings for contact information
- See the next upcoming activity for their group
- RSVP for the events

Authenticated users who are active, current participants in the group can:

- See the next upcoming activity for their group(s).
- RSVP to indicate which activities they plan to attend, might attend, or won't attend.

## Logging into Group Connect

<https://eriercd.cloudapps.ministryplatform.cloud/apps/grouplife>

### **Important Notes:**

- PC users, create a favorite/bookmark. Mobile users, add it to your device's home screen
- The leader can **NOT** have the same email address as any other contact in MP.

## Setting Privacy Settings

1. Click the **My Privacy** button in the upper right corner.
2. Click the circle choose to allow birthday, e-mail, phone address, photo to be seen by other group members or just the group leader.

## Communications

There is no emailing or texting for group members through Group Connect.

## RSVP-ing for Group Activities

1. Click on a group to switch to its home page.
2. Click the RSVP button at right for the Next Upcoming Activity

