

## INTRODUCTION

The Workflow Extensions plugin contains several custom workflow actions. These allow users to create user forms much more easily and set workflow and entity attributes in single actions.

## WORKFLOW ACTIONS

After you have installed the Workflow Extensions plugin, you should now have the following workflow actions available under BEMA Services > Workflow Extensions:

### ATTRIBUTE VALUES SET

The Attribute Values Set action uses an attribute matrix to set workflow values. For each row, you select the Workflow Attribute that you're setting and then use either lava or another workflow attribute as the value you're setting:

Attributes Set

Name \*

Attributes Set

☒ Action is Completed on Success  
☐ Activity is Completed on Success

Action Type

Attribute Values Set

'Set Attribute Value' Overview  
Sets multiple attributes' values to the selected values.

Set Workflow Attributes

Workflow Attribute	Value	
First Name	{% assign person = Workflow   Attribute:'Person','Object' %} {{person.FirstName}}	<input type="text"/>
Last Name	{% assign person = Workflow   Attribute:'Person','Object' %} {{person.LastName}}	<input type="text"/>
Allergy	{% assign person = Workflow   Attribute:'Person','Object' %}{{person   Attribute:'Allergy'}}	<input type="text"/>
Legal Notes	{% assign person = Workflow   Attribute:'Person','Object' %}{{person   Attribute:'LegalNotes'}}	<input type="text"/>

### Set Workflow Attributes

**Workflow Attribute \***  

Last Name

**Value**  

{% assign person = Workflow | Attribute:'F'

 or

Save

Cancel

## ENTITY PROPERTIES SET

The Entity Properties Set action uses an attribute matrix to set entity properties. For each row, you select the Property that you're setting and then use either java or another workflow attribute as the value you're setting:

Set Entity Properties

Name \*

Set Entity Properties

☒ Action is Completed on Success  
☐ Activity is Completed on Success

Action Type

Entity Properties ...

'Set Entity Property' Overview  
Sets entity properties.

Entity Type ⓘ \*

Person x

Entity Id or Guid ⓘ

{{ Workflow | Attribute:'Person','Id'}}

 or 

Entity Attribute

Set Entity Properties

Property Name	Value
FirstName	First Name
LastName	Last Name

Empty Value Handling ⓘ \*

Ignore empty values

### Set Entity Properties

Property Name

LastName

 or

Value

 or 

Last Name

Save

Cancel

## ENTITY ATTRIBUTES SET

The Entity Attributes Set action uses an attribute matrix to set entity attributes. For each row, you select the Property that you're setting and then use either lava or another workflow attribute as the value you're setting:

Set Entity Attributes

Name \*

Set Entity Attributes

☒ Action is Completed on Success

☐ Activity is Completed on Success

Action Type

Entity Attributes S...

'Set Entity Attribute' Overview

Sets entity attributes.

Entity Type ⓘ

Person

Entity Id or Guid ⓘ

{{ Workflow | Attribute:'Person','Id' }}

or

Entity Attribute

Set Entity Attributes

Attribute Key	Value
Allergy	Allergy
LegalNotes	Legal Notes

### Set Entity Attributes

Attribute Key

LegalNotes

or

Value

or

Legal Notes

Save

Cancel

## ATTRIBUTE MATRIX ITEM ADD

The Attribute Matrix Item Add action uses an attribute matrix to add a new item to an new or existing matrix. To work for all matrix templates, we have the user enter a row for each column in the target matrix they want to add an item to. For each row, you'll set the Key of that column ( Found in the General Settings > Attribute Matrix Templates > Template Detail page), as well as the value you want to store.

Add Color To Matrix

Name

☒ Action is Completed on Success  
☐ Activity is Completed on Success

Action Type

Attribute Matrix It...

'Add Item To Matrix' Overview  
Adds an item to a specified Attribute Matrix with the specified values.

Matrix

Matrix

Attribute Item Values

	Column Key	Column Value	
	Color	Favorite Color	<div>×</div>
	Date	{{ 'Now'   Date:'M/d/yyyy' }}	<div>×</div>
			<div>+</div>

Column Key

Column Value

or

Favorite Color

▼

Save

Cancel

## ADD NEW PERSON TO FAMILY

The Add New Person to Family action will look for a person that matches the provided fields. If one is not found, a new person will be created from the fields. Then, if the person does not already exist in the specified family, they'll be added with the specified group role. Finally, the person will be saved to the specified Person Workflow Attribute.

Add New Person to Family

☒ Action is Completed on Success  
☐ Activity is Completed on Success

**Name**

**Action Type**

**'Get Person From Fields' Overview**  
 Sets an attribute to a person with matching name and email. If single match is not found a new person will be created.

<b>First Name</b> <input type="text"/>  <b>Last Name</b> <input type="text"/>  <b>Email Address</b> <input type="text"/>  <b>Mobile Number</b> <input type="text"/>  <b>Birth Day</b> <input type="text"/>  <b>Birth Month</b> <input type="text"/>  <b>Birth Year</b> <input type="text"/>	or	<b>Attribute Value</b> <input type="text" value="First Name"/>  <b>Attribute Value</b> <input type="text" value="Last Name"/>  <b>Attribute Value</b> <input type="text" value="Email"/>  <b>Attribute Value</b> <input type="text" value="Phone Number"/>  <b>Attribute Value</b> <input type="text"/>  <b>Attribute Value</b> <input type="text"/>  <b>Attribute Value</b> <input type="text"/>
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**Person Attribute**

**Family Attribute**

**Group Role Attribute**

**Default Record Status**

**Default Connection Status**

## SYSTEM JOBS

The Workflow Extensions plugin also includes a new system job, *Run Lava*.

### RUN LAVA

The Run Lava job allows you to run lava on a set schedule, mostly useful for grabbing a set of people or other entities and launching workflows with them.

🕒 Edit Service Job

▼

Name \*

Launch Test Workflow

Active

☒ Yes

Description

Notification Status

All ▼

Notification Emails ⓘ

Job Type \*

com.bemaservices.WorkflowExtensions.Jobs.RunLava ▼

Cron Expression ⓘ \*

0 0 0 ? \* SUN \*

Cron Description

At 00:00 AM, only on Sunday

Last Status Message

Activated new workflow with the id of #13.

Lava ⓘ \*

```
1 {% workflowactivate workflowtype:'24' %}
2   Activated new workflow with the id of #{{ Workflow.Id }}.
3 {% endworkflowactivate %}
```

Enabled Lava Commands ⓘ

☐ All

☐ Cache

☐ Execute

☐ RockEntity

☐ Search

☐ Sql

☐ WebRequest

☒ WorkflowActivate

Save

Cancel

## SUPPORTING ATTRIBUTE MATRIXES

The Workflow Extensions plugin uses several attribute matrixes, listed below.

Attribute Matrix Template List				
Name	Description	Active		
Internal Article List		✓	✗	
Set Entity Attributes	A System Template used by the SetEntityAttributes Workflow Action. Do Not Delete.	✓	✗	
Set Entity Properties	A System Template used by the SetEntityProperties Workflow Action. Do Not Delete.	✓	✗	
Set Workflow Attributes	A System Template used by the SetAttributeValues Workflow Action. Do Not Delete.	✓	✗	
50 500 5,000 4 Matrix Templates				