

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}}	<div>✕</div>
Last Name	{% assign person = Workflow Attribute:'Person','Object' %} {{person.LastName}}	<div>✕</div>
Allergy	{% assign person = Workflow Attribute:'Person','Object' %}{{person Attribute:'Allergy'}}	<div>✕</div>
Legal Notes	{% assign person = Workflow Attribute:'Person','Object' %}{{person Attribute:'LegalNotes'}}	<div>✕</div>

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

Add Color To Matrix

☒ 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
Date	{{ 'Now' Date:'M/d/yyyy' }}

Column Key

Color

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

Name *

Add New Person to Family

☒ Action is Completed on Success

☐ Activity is Completed on Success

Action Type

Add New Person t...

'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.

First Name i

or

Attribute Value

First Name

Last Name i

or

Attribute Value

Last Name

Email Address i

or

Attribute Value

Email

Mobile Number i

or

Attribute Value

Phone Number

Birth Day i

or

Attribute Value

Birth Month i

or

Attribute Value

Birth Year i

or

Attribute Value

Person Attribute i *

New Person

Family Attribute i *

Group

Group Role Attribute i *

Group Role

Default Record Status i

Pending

Default Connection Status i

Web Prospect

ADD METRIC VALUE

The Add Metric Value action adds a metric value to the metric specified. If you want to add value partitions, use the attribute matrix to set the partition label and the entity Id/Guid you're setting it to.

Add Metric Value

Name

Add Metric Value

☒ Action is Completed on Success

☐ Activity is Completed on Success

Action Type

Metric Value Add

'Add Metric Value' Overview

Adds a metric value.

Metric Id or Guid

2

or

Metric Attribute

Metric Value Type

☒ Measure

☐ Goal

Metric Value Date

12/23/2019

or

MetricValueDate Attribute

Note

Test note

or

Note Attribute

YValue

96

or

YValue Attribute

Set Metric Value Partitions

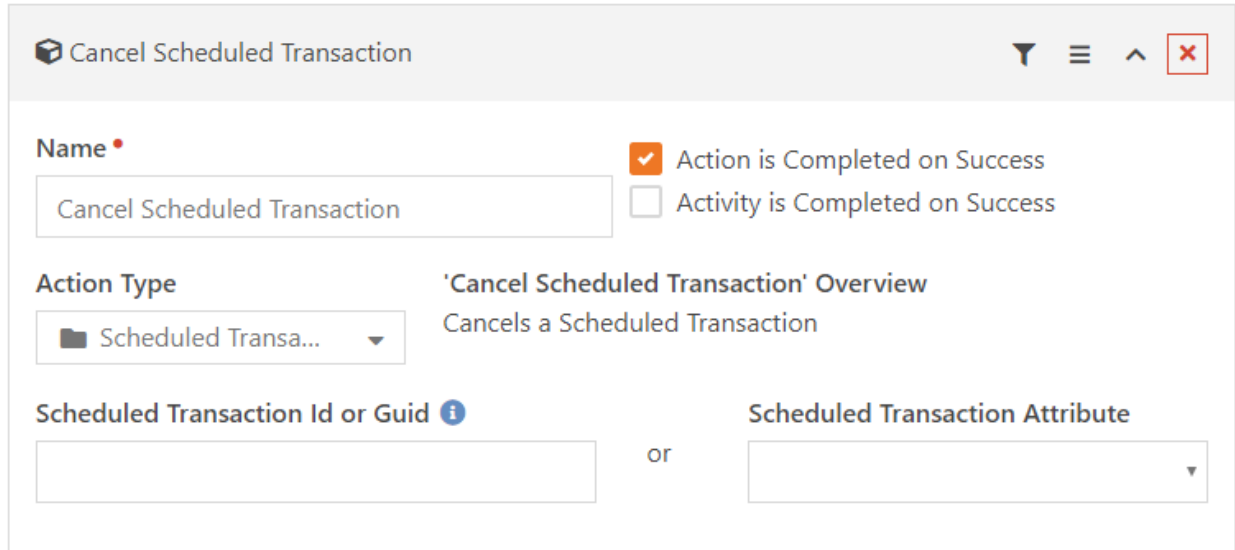
	Label	Value	
	Service	6	<input checked="" type="checkbox"/>
	Campus	1	<input checked="" type="checkbox"/>

Empty Value Handling

Ignore empty values

SCHEDULED TRANSACTION CANCEL

The Scheduled Transaction Cancel Action will take the Id or Guid of a scheduled transaction and cancel it and its schedule:



The screenshot shows a configuration window titled "Cancel Scheduled Transaction". At the top right, there are icons for a funnel, a menu, an expand/collapse arrow, and a close button (X). The main configuration area includes:

- Name:** A text input field containing "Cancel Scheduled Transaction".
- Action Type:** A dropdown menu showing "Scheduled Transa...".
- Completion Options:** Two checkboxes: "Action is Completed on Success" (checked) and "Activity is Completed on Success" (unchecked).
- Overview:** A section titled "'Cancel Scheduled Transaction' Overview" with the description "Cancels a Scheduled Transaction".
- Input Fields:** Two input fields separated by the word "or". The first is labeled "Scheduled Transaction Id or Guid" with an information icon. The second is labeled "Scheduled Transaction Attribute" with a dropdown arrow.

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

Cron Expression ⓘ *

0 0 0 ? * SUN *

Notification Emails ⓘ

Cron Description

At 00:00 AM, only on Sunday

Job Type *

com.bemaservices.WorkflowExtensions.Jobs.RunLava

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 ⓘ

- | | | |
|----------------------------------|-------------------------------------|--|
| <input type="checkbox"/> All | <input type="checkbox"/> RockEntity | <input type="checkbox"/> WebRequest |
| <input type="checkbox"/> Cache | <input type="checkbox"/> Search | <input checked="" type="checkbox"/> WorkflowActivate |
| <input type="checkbox"/> Execute | <input type="checkbox"/> Sql | |

Save

Cancel

FIELD TYPES

The Workflow Extensions plugin also includes a new Field Type, *Schedule Builder*.

SCHEDULE BUILDER

The Schedule Builder field type will let you build schedules, save, and reference them from workflows. The schedule will be stored as a Guid.

The screenshot shows a 'Test Workflow' interface with a 'Schedule Builder' modal dialog open. The dialog has a title bar with a close button. It contains the following fields and controls:

- Start Date / Time**: A date field showing '1/22/2020' and a time field showing '12:00 AM', both with calendar and clock icons respectively.
- Duration**: Two input fields, one for 'hrs' (value '1') and one for 'mins' (value '0').
- Frequency**: Two radio buttons, 'One Time' (selected) and 'Recurring'.
- Buttons**: 'OK' and 'Cancel' buttons at the bottom right.

In the background, the workflow editor shows a 'Work Entry' section with a 'Schedule' field and an 'Edit Schedule' button, and a 'Submit' button at the bottom.

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				