



15: Lava in Workflows





What's a Workflow?

- Easy Automation
- A way to Take Actions
- A way to Make Changes
- NOT long-term storage





What's a Workflow?

We refer to workflows as the “muscles” of Rock because they move things around.

But muscles need something to pull on.





Inside Workflows



Keep in Mind:

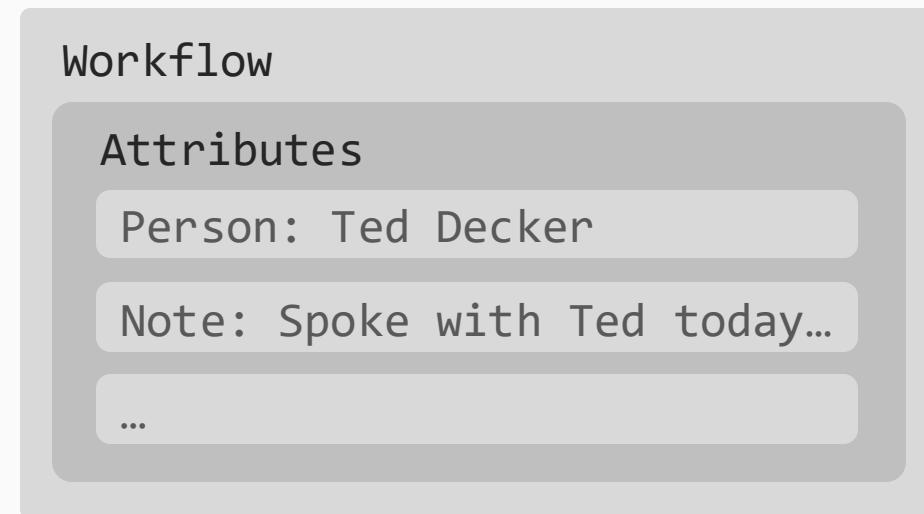
Workflows use Attributes to store information while they're running.





Workflows: Attributes

If a workflow is designed to add a person note, what would it need?





Workflows: Attributes

Workflow

Attributes

Person: Ted Decker

Note: Spoke with Ted today...

...

Workflow Configuration

Home > General Settings > Workflow Configuration

Workflow Type + ⌂ ⌂ ⌂

- > Check-in
- > Data Integrity
- > Requests
- > Safety & Security
- > ★ Samples
 - Add Person Note
 - Landing Page
 - Position Approval
 - Staff Forms

Add Person Note

Details

Advanced Settings

Attributes Count: 2

Attribute	Description	Key	Field Type	Required
☰ Person		Person	Person	<input type="button" value="✎"/> <input type="button" value="✖"/>
☰ Note		Note	Memo	<input type="button" value="✎"/> <input type="button" value="✖"/>



Workflows: Activities & Actions

Workflow

Attributes

Person:

Note:

...

Activity

Action: Form

Action: Add Note

Action: Complete Workflow



Workflows: Activities & Actions

Workflow

Attributes

Person:

Note:

...

Activity

Action: Form

Action: Add Note

Action: Complete Workflow

The screenshot shows the Rivet interface for configuring a workflow activity. The top navigation bar is orange with the Rivet logo, a search bar, and a user profile icon. The main area has a light gray background with a dark sidebar on the left containing icons for document, person, money, tools, and briefcase.

Start

Name *: Start Active Activated with Workflow

Description

Attributes

Actions

+ Add Action

- Form
- Create Note
- Complete Workflow

Save Cancel



Workflows: Activities & Actions

Workflow

Attributes

Person:

Note:

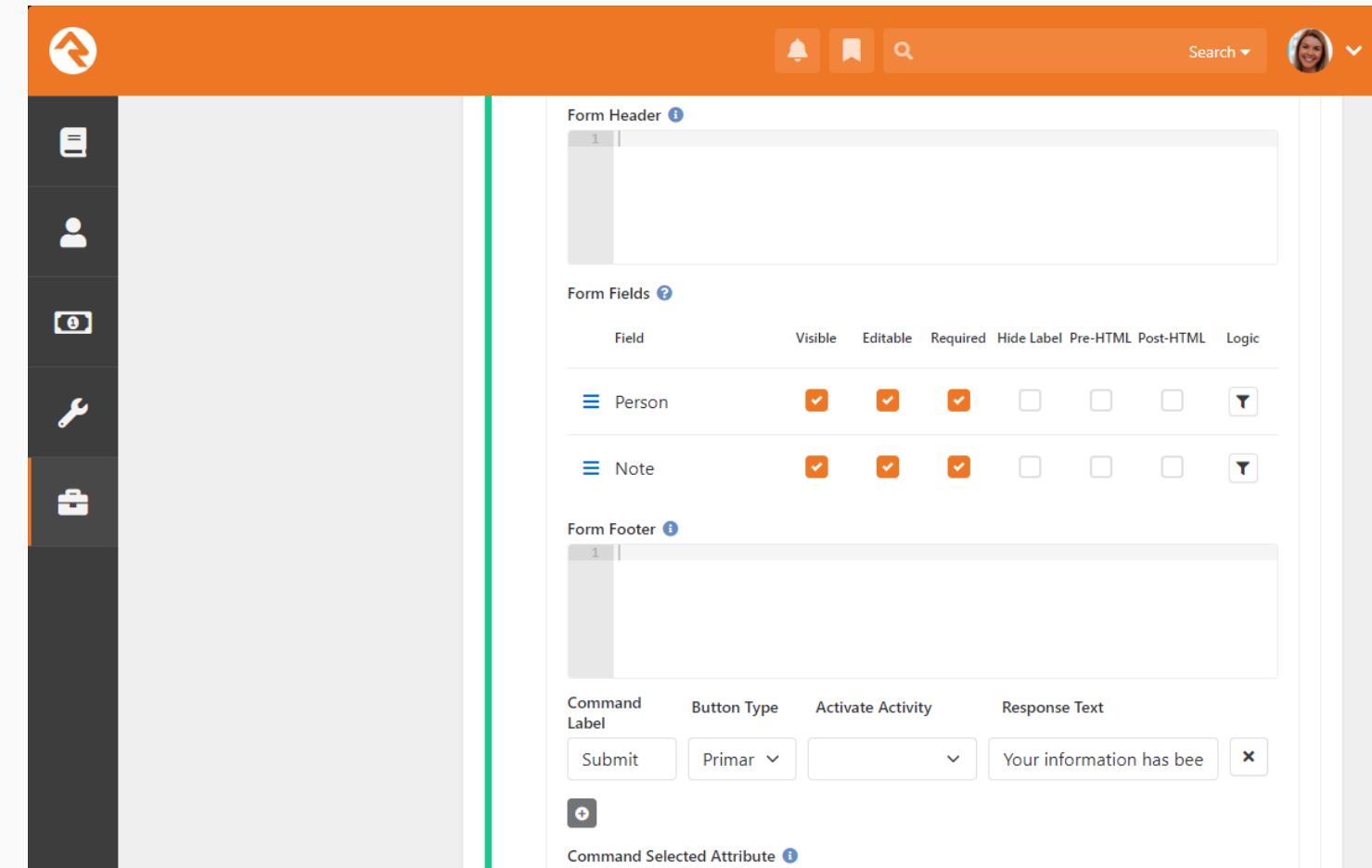
...

Activity

Action: Form 

Action: Add Note

Action: Complete Workflow



The screenshot shows a software interface for configuring workflows. On the left is a sidebar with icons for document, person, money, tools, and briefcase. The main area is a light gray workspace. To the right is a detailed configuration panel with the following sections:

- Form Header**: A section for defining the top part of a form, currently empty.
- Form Fields**: A table for defining fields:

Field	Visible	Editable	Required	Hide Label	Pre-HTML	Post-HTML	Logic
Person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
- Form Footer**: A section for defining the bottom part of a form, currently empty.
- Command Label**: A dropdown menu set to "Submit".
- Button Type**: A dropdown menu set to "Primary".
- Activate Activity**: A dropdown menu currently empty.
- Response Text**: A text input field containing "Your information has bee" followed by a delete button (X).
- Command Selected Attribute**: A section for selecting attributes, currently empty.



Workflows

Workflow

Attributes

Person:

Note:

...

Activity

Action: Form 

Action: Add Note

Action: Complete Workflow

Add Person Note

Home > Workflows > Add Person Note

Work Entry

Person *

Note *

Submit



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form 

Action: Add Note

Action: Complete Workflow

Add Person Note

Home > Workflows > Add Person Note

Work Entry

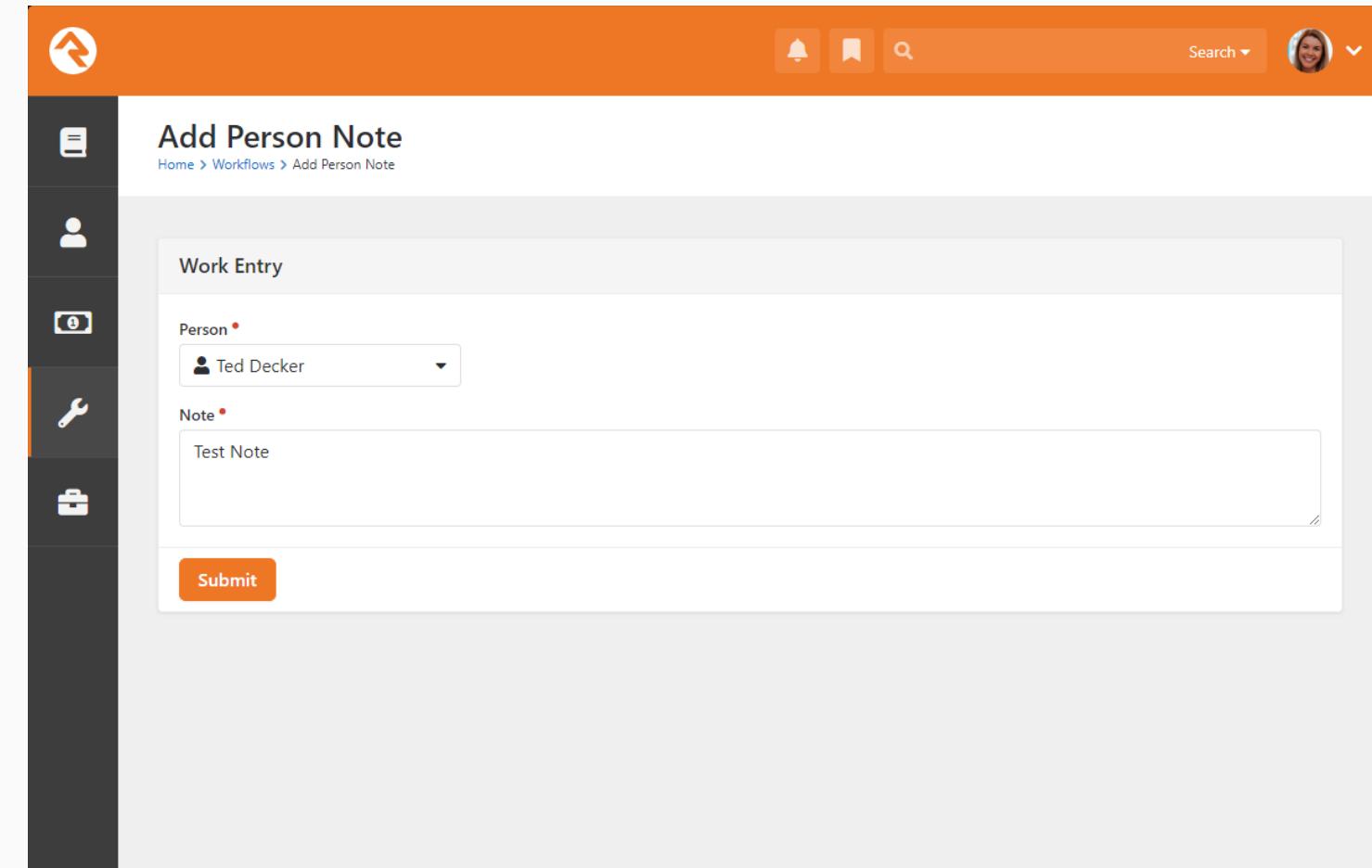
Person *

Ted Decker

Note *

Test Note

Submit





Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form

Action: Add Note

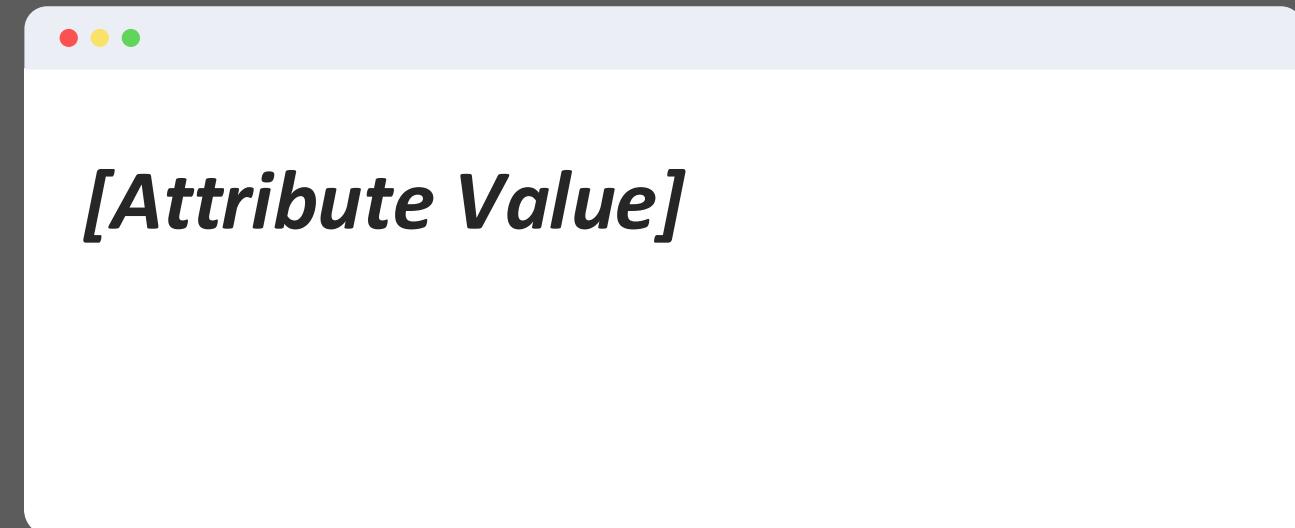
Action: Complete Workflow

The screenshot shows a software interface for managing workflows. On the left is a vertical sidebar with icons for document, person, money, tools, and briefcase. The main area has a header with a logo, a bell icon, a bookmark icon, a search bar, and a user profile. The central panel is titled "Create Note". It includes fields for "Name" (with "Create Note" entered), checkboxes for "Action is Completed on Success" (checked) and "Activity is Completed on Success" (unchecked), and a "Action Type" dropdown set to "Person Not...". A tooltip for this action says "'Person Note Add' Overview: Adds a note to the selected person." Below this are fields for "Person" (set to "Person"), "Note Type" (set to "Personal Note"), "Caption", "Text" (a large red-bordered text area), and "Author".



Workflow Attributes

```
1 {{ Workflow | Attribute:'key' }}
```





Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form

Action: Add Note

Action: Complete Workflow

The screenshot shows a software interface for managing workflows. On the left is a vertical sidebar with icons for document, person, money, tools, and briefcase. The main area has a light gray background. A central vertical bar is highlighted in green. To the right of this bar is a 'Create Note' dialog box with the following fields:

- Name ***: Create Note Action is Completed on Success Activity is Completed on Success
- Action Type**: Person Note... 'Person Note Add' Overview
Adds a note to the selected person.
- Person**: Person
- Note Type**: Personal Note
- Caption**: (empty)
- Text**: {{ Workflow | Attribute:'Note' }}
- Author**: (empty)

The top right corner of the interface includes a search bar, a user profile picture, and a 'Search' button.



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form

Action: Add Note

Action: Complete Workflow

The screenshot shows a CRM application interface. At the top, there's a navigation bar with icons for bell, bookmark, search, and user profile. Below the navigation is a toolbar with buttons for Today, 7 yr, 0 / 16, eRA, and other filters. The main area features a large profile picture of a smiling man with glasses. Below the picture, the name "Ted Decker" is displayed, followed by his title "Theodore" and status "Member". There are three buttons: "Email", "Actions", and "Edit". To the right of the profile, there's a section titled "Alert: Personal Note" which lists a recent note from "Alisha Marble" about his mother's hospitalization. A red box highlights a note from "Alisha Admin" that says "Test Note". Another note from "Alisha Marble" is also listed at the bottom.

Profile Extended Attributes Steps Groups Documents Contributions More

Today 7 yr 0 / 16 eRA

Write a note...

Alert: Personal Note

Alisha Marble Personal Note · 8 years ago
Called Ted and heard that his mother is in the hospital and could use prayer.

Alisha Admin Personal Note · 5 seconds ago
Test Note

Alisha Marble Personal Note · 8 years ago
Talked to Ted today about starting a new Young Adults ministry



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form

Action: Add Note

Action: Complete Workflow

The screenshot shows a software interface for managing workflows. On the left is a vertical sidebar with icons for document, person, money, tools, and briefcase. The main area has a header with a logo, a bell icon, a bookmark icon, a search bar, and a user profile. The central panel is titled "Create Note". It includes fields for "Name" (with "Create Note" entered), "Action Type" (set to "Person Not..."), "Person" (set to "Person"), "Note Type" (set to "Personal Note"), "Caption" (empty), "Text" (containing "Added to Serving Team"), and "Author" (empty). There are also checkboxes for "Action is Completed on Success" (checked) and "Activity is Completed on Success". A tooltip for the action type says "'Person Note Add' Overview: Adds a note to the selected person."



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form

Action: Add Note

Action: Complete Workflow

The screenshot shows a software interface for managing workflows. On the left is a vertical sidebar with icons for document, person, money, tools, and briefcase. The main area has a header with a logo, a search bar, and a user profile. A central workspace shows a 'Create Note' configuration. The configuration includes:

- Name:** Create Note Action is Completed on Success Activity is Completed on Success
- Action Type:** Person Note... 'Person Note Add' Overview Adds a note to the selected person.
- Person:** Person
- Note Type:** Personal Note
- Caption:** (empty)
- Text:** Workflow completed on {{ 'Now' | Date:'M/d/yyyy' }}
- Author:** (empty)



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form ✓

Action: Add Note ▶

Action: Complete Workflow

The screenshot shows the Rivet interface for configuring a workflow step. The top navigation bar is orange with icons for notifications, bookmarks, search, and user profile. The main area has a sidebar with icons for document, person, money, tools, and file.

Create Note

Name *: Create Note Action is Completed on Success Activity is Completed on Success

Action Type: Person Note... 'Person Note Add' Overview Adds a note to the selected person.

Person: Person

Note Type: Personal Note

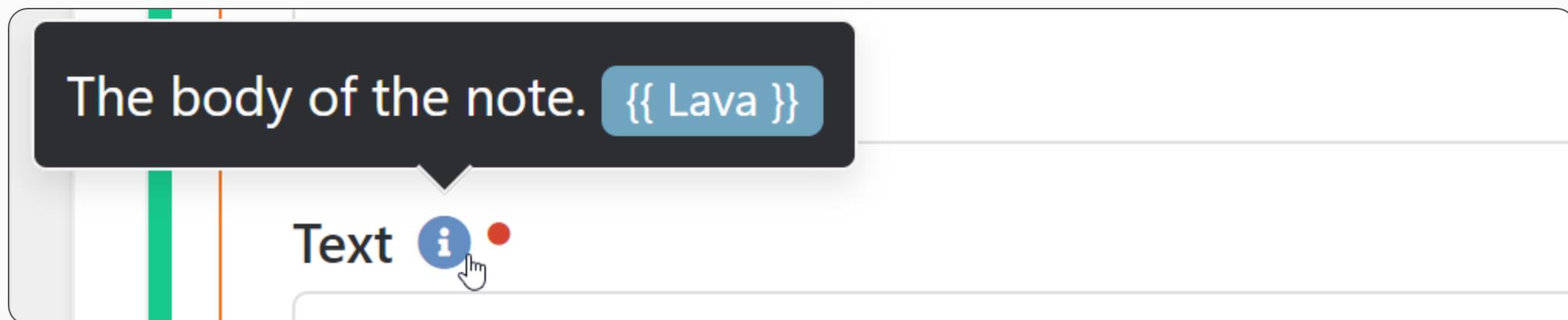
Caption: The body of the note. [[Lava]]

Text: Workflow completed on {{ 'Now' | Date:'M/d/yyyy' }}

Author: (empty)



Workflows





Getting Data Automatically

No form required!





Workflows

Workflow

Attributes

Person:

Note:

Spouse:

Workflow Configuration

Home > General Settings > Workflow Configuration

Workflow Type + ⌂ ⌂

- > Check-in
- > Data Integrity
- > Requests
- > Safety & Security
- > ★ Samples
 - Add Person Note
 - Landing Page
 - Position Approval
- Staff Forms

Add Person Note

Details

Advanced Settings

Attributes Count: 3

Attribute	Description	Key	Field Type	Required	
Person	Person	Person	Person		
Note	Note	Note	Memo		
Spouse	Spouse	Spouse	Person		



Workflows

Workflow

Attributes

Person:

Note:

Spouse:

The screenshot shows the Rivet interface for configuring a workflow. On the left, there's a sidebar with icons for Person, Note, Spouse, and Case. The main area is titled "Form Fields" and lists three fields: Person, Note, and Spouse. Each field has checkboxes for "Visible", "Editable", "Required", "Hide Label", "Pre-HTML", "Post-HTML", and "Logic". The "Person" field is checked for all categories except "Logic". The "Note" field is checked for "Visible", "Editable", and "Required". The "Spouse" field is unchecked for all categories. Below the fields is a "Form Footer" section with a single row containing the number "1". At the bottom, there are buttons for "Command Label" (Submit), "Button Type" (Primary), "Activate Activity", and "Response Text" (Your information has bee). There's also a "Command Selected Attribute" dropdown.

Field	Visible	Editable	Required	Hide Label	Pre-HTML	Post-HTML	Logic
Person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Form Footer

1 |

Command Label: Submit
Button Type: Primary
Activate Activity:
Response Text: Your information has bee

Command Selected Attribute:



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse:

Activity

Action: Form

Action: Get Spouse

Action: Add Note

Action: Complete Workflow

The screenshot shows the Ravello interface with an orange header. On the left is a sidebar with icons for Home, People, Money, Tools, and Projects. The main area has a title 'Get Spouse'. The 'Name' field contains 'Get Spouse'. Under 'Action Type', 'Lava Run' is selected. A tooltip for 'Lava Run' says: "'Lava Run' Overview: Runs the provided Lava template and sets an attribute's value to the result.' There is also a note about 'Action is Completed on Success' being checked.



Lava Run Action

```
{{ 'Hello World' | Upcase }}
```



Lava Run Action

HELLO WORLD





Lava Run Action





Lava Run Action

Store our Message

Name •
Store our Message Action is Completed on Success
 Activity is Completed on Success

Action Type
Lava Run

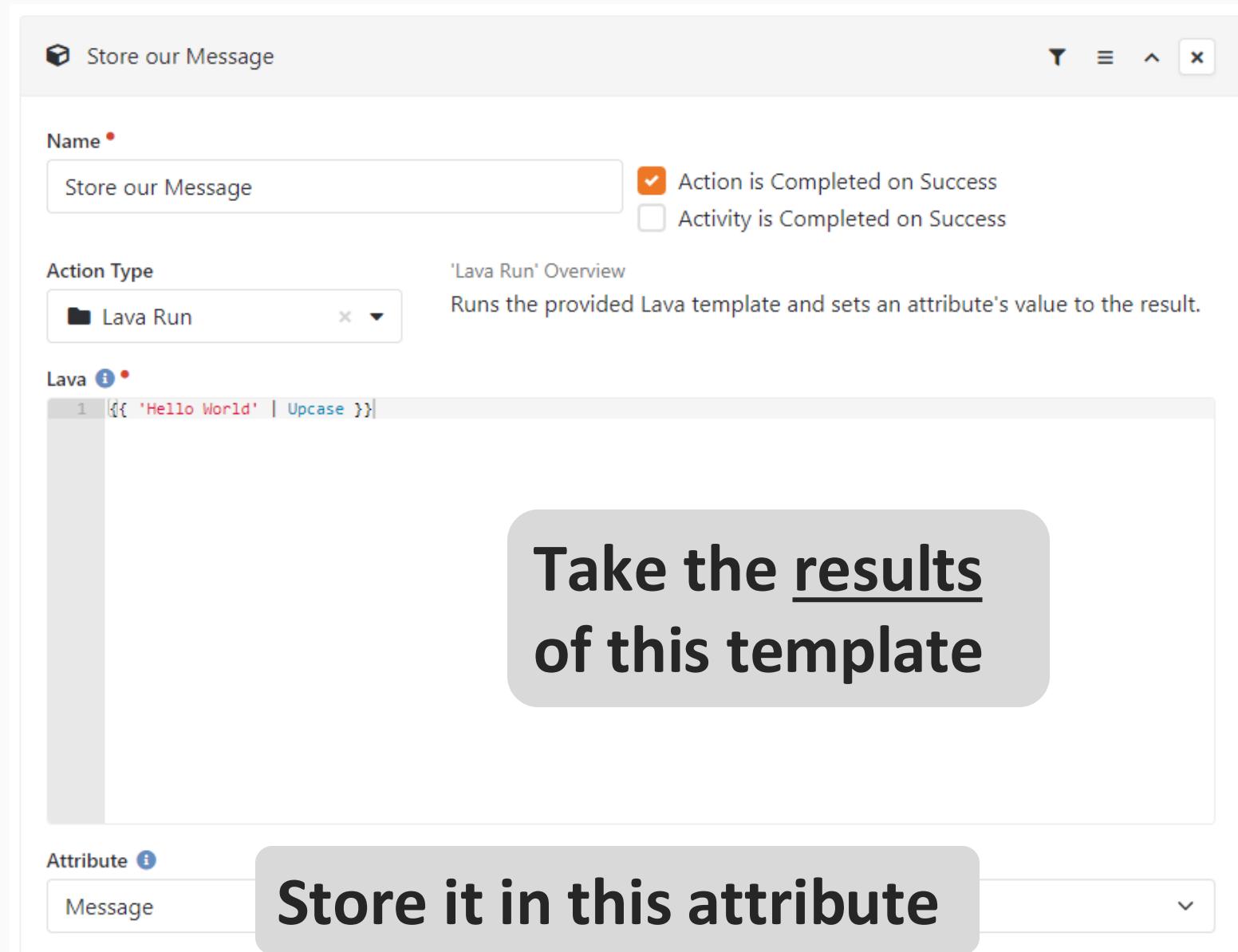
'Lava Run' Overview
Runs the provided Lava template and sets an attribute's value to the result.

Lava ⓘ •
1 {{ 'Hello World' | Upcase }}

Take the results of this template

Attribute ⓘ
Message

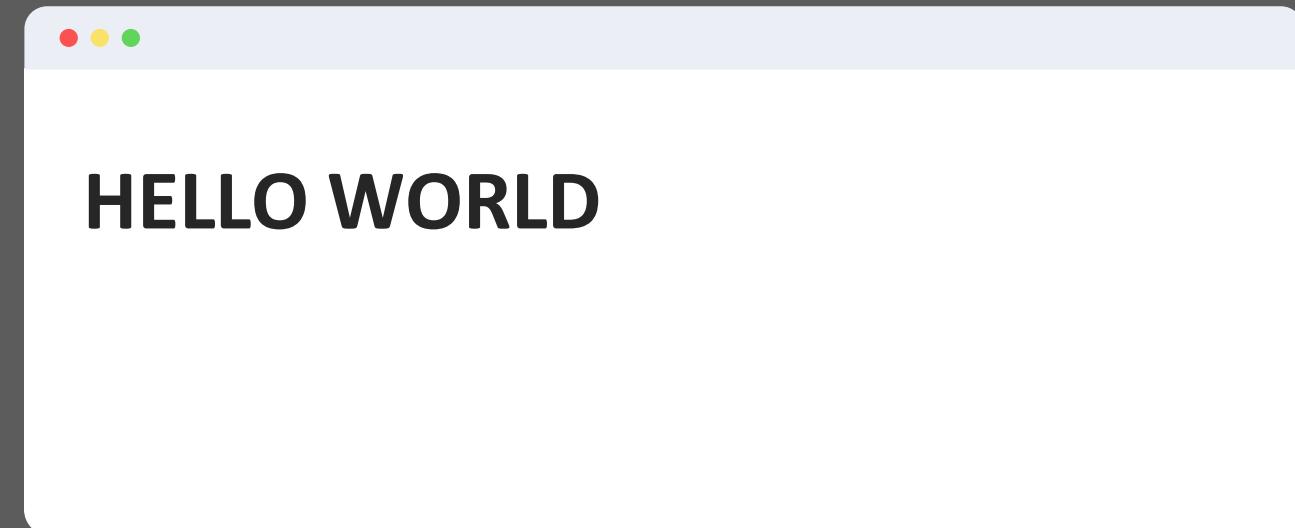
Store it in this attribute





Workflow Attributes

```
1 {{ Workflow | Attribute:'Message' }}
```





Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse:

Activity

Action: Form

Action: Get Spouse

Action: Add Note

Action: Complete Workflow

The screenshot shows a workflow configuration interface with an orange header. The left sidebar has icons for document, person, money, wrench, and briefcase. The main area shows a 'Lava Run' action card.

Lava Run

Name *: Lava Run

Action is Completed on Success
 Activity is Completed on Success

Action Type: Lava Run

'Lava Run' Overview
Runs the provided Lava template and sets an attribute's value to the result.

Lava

1 |

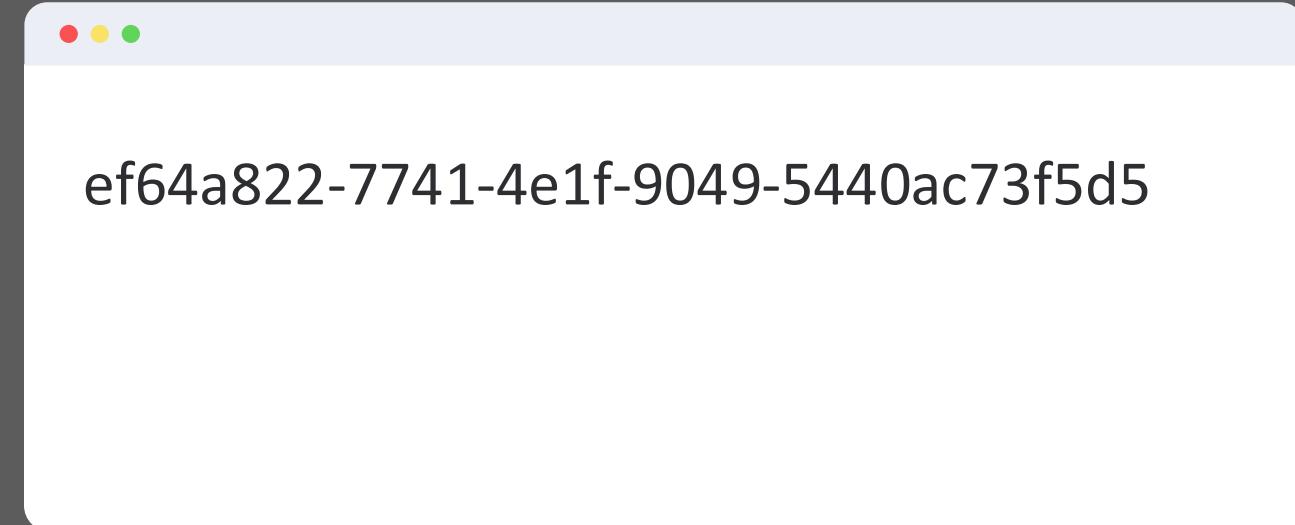
Attribute: Spouse



Workflow Attributes

```
1 {{ Workflow | Attribute:'Person', 'Object' | Spouse | Property:'PrimaryAlias.Guid' }}
```

"Ted Decker"





Workflow Attributes

```
1 {{ Workflow | Attribute:'Person', 'Object' | Spouse | Property:'PrimaryAlias.Guid' }}
```

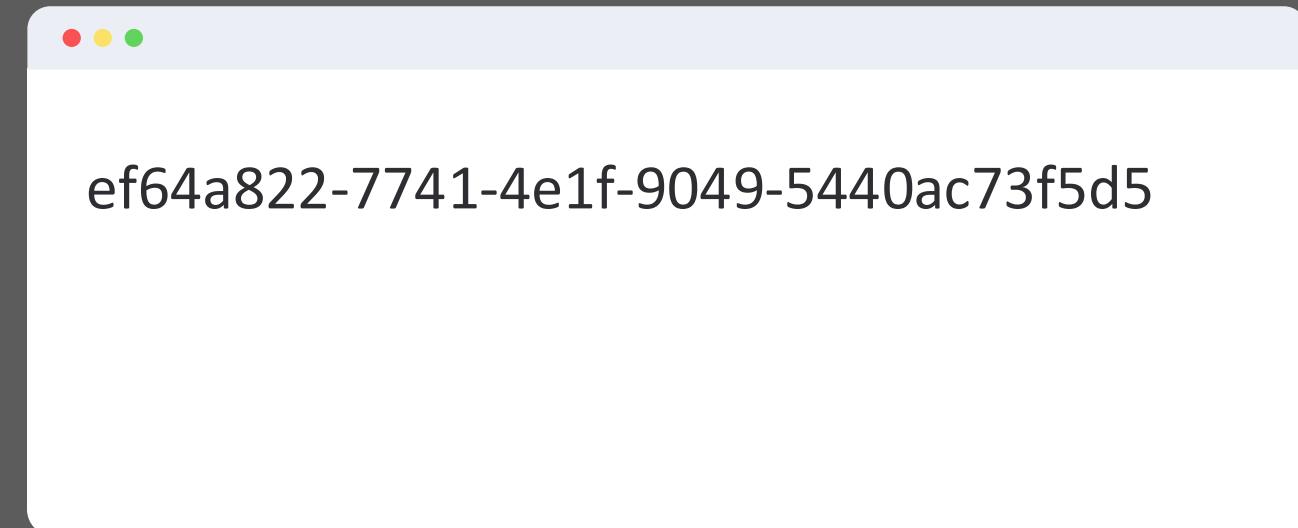
```
{  
  "Id": 5,  
  "NickName": "Ted",  
  "LastName": "Decker",  
  [...]  
}
```

```
{  
  "Id": 6,  
  "NickName": "Cindy",  
  "LastName": "Decker",  
  [...]  
}
```



Workflow Attributes

```
1 {{ Workflow | Attribute:'Person','Object' | Spouse | Property:'PrimaryAlias.Guid' }}
```





Workflows

Why is that the value we want?





Workflows

Why is that the value we want?

We're setting the value of another attribute.

The screenshot shows the Rally Workflows interface. On the left is a vertical toolbar with icons for Document, Person, Money, Tools, and Portfolio Item. The main area has a green vertical bar on the left and a red arrow pointing to the 'Spouse' attribute field. A 'Get Spouse' action card is open, showing the following details:

- Name:** Get Spouse
- Action Type:** Lava Run
- Lava:**

```
1 {{ Workflow | Attribute:'Person', 'Object' | Spouse | Property:'PrimaryAlias.Guid' }}
```
- Attribute:** Spouse

Checkboxes for 'Action is Completed on Success' and 'Activity is Completed on Success' are checked.



Workflows

Why is that the value we want?

We're setting the value of another attribute.

The screenshot shows the 'Workflow Configuration' page within a software application. The top navigation bar includes icons for Home, General Settings, Workflow Configuration, and a user profile. The left sidebar features icons for Document, Person, Money, Tools, and Briefcase, with the Briefcase icon currently selected. The main content area displays a list of 'Workflow Type' items: Check-in, Data Integrity, Requests, Safety & Security, and Samples. The 'Samples' item is expanded, showing options like Add Person Note (which is highlighted with a blue background), Landing Page, Position Approval, and Staff Forms. To the right, a large panel titled 'Add Person Note' contains sections for 'Details' and 'Advanced Settings'. Below these is a table titled 'Attributes Count: 3' with columns for Attribute, Description, Key, Field Type, and Required. The table rows are:

Attribute	Description	Key	Field Type	Required	
Person	Person	Person	Person		
Note	Note	Note	Memo		
Spouse	Spouse	Spouse	Person		

A red rectangular box highlights the 'Spouse' row in the table.



Workflows

Why is that the value we want?

We're setting the value of another attribute.

<https://community.rockrms.com/lava/workflows>

The screenshot shows a website interface with a navigation bar at the top. On the left, there's a sidebar with categories like 'Community', 'Learn', and 'Lava'. The 'Lava' category is currently selected. The main content area has a large orange header with the text 'Workflows and Lava'. Below the header, there's a section titled 'Workflows & Lava' with a sub-section titled 'Attribute Values'. The text discusses retrieving data identifiers for attributes and provides examples of merge field syntax. There's also a section titled 'Field Types' with a note about internal storage. On the right side, there's a sidebar with sections for 'Formatting', 'Filters', and 'Tags'.

Community

- Q&A
- Recipes
- Ideas & Core Changes
- Chat
- Get Involved
- Blog
- Podcast

Learn

- Ask Chip
- Manuals
- Lava
- Styling
- Rock U
- Classes

ROCK COMMUNITY / LAVA / WORKFLOWS AND LAVA

Log In

Workflows and Lava

Workflows & Lava

Workflows and Lava goes together like peas and carrots.

Attribute Values

There may be a time when you'd like to retrieve the data identifier for an attribute. This would be helpful in creating links to pages that would need to know which person, group, etc. you are interested in. You can retrieve the unformatted attribute value by appending a RawValue to the attribute syntax. For example, using a merge field of `{{ Workflow | Attribute:'Person', 'RawValue' }}` would return a person alias GUID since that is how the Person type attribute stores its value.

It's important that you understand the internal types of many of the fields you'll be using. Below is an overview of the internal type for each field provided in Rock.

Field Types

Below is a listing of each field type available in your workflow, and how it's stored internally.

Lava Home

Formatting

- Lava Style Guide

Filters

- Intro To Filters
- Text Filters
- Date Filters
- Numeric Filters
- Color Filters
- Arrays
- Person
- Attributes
- Other

Tags

- Assign / Capture
- If / Else
- Case



Workflows

Why is that the value we want?

We're setting the value of another attribute.

<https://community.rockrms.com/lava/workflows>

			Interaction Context
	Assessment Types	A comma-delimited list of assessment type GUIDs	Yes
	Asset	A string containing the properties of an asset	No
	Asset Storage Provider	An asset storage provider's GUID	No
	Attendance	An attendance record's GUID	Yes
	Attribute	An attribute's GUID	No
	Audio File	The audio file's GUID	Yes
	Audio URL	The URL of the audio file	No
	Background Check	This is the RecordKey value for Checkr (preceded by an identifier and comma), or the GUID of the file for the Protect My Ministry document	No
	Badges	A comma-delimited list of badge GUIDs	No
	Benevolence Request	A benevolence request's GUID	Yes
	Benevolence Type	A benevolence type's GUID	Yes
	Binary File	A binary file's GUID	Yes
	Binary File Type	A binary file type's GUID	Yes
	Binary File	A comma-delimited list of binary file type GUIDs	No

Misc
Using Lava Remotely
Creating APIs Using Lava
Workflows and Lava
About Lava Fluid
Lava With Obsidian



Workflows

Why is that the value we want?

We're setting the value of another attribute.

So we can't just store the text "Cindy Decker"...

<https://community.rockrms.com/lava/workflows>

	Metrics	A comma-delimited list of metric GUIDs	No
	Mobile Navigation Action	The action Type, the Pop Count and the Page Guid. Note that this field type is not meant to be used directly in places like workflows or person attributes, and is intended for use as a block setting.	No
	Month Day	The selected month and day, formatted as: M/d	No
	Multi-Select	A comma-delimited list of the values (e.g. 1,2,3) of the selected items	No
	Note Type	A note type's GUID	Yes
	Note Types	A comma-delimited list of GUIDs for each selected type of note	No
	Page Reference	Value is in format 'Page.Guid,PageRoute.Guid' but only 'Page.Guid' is required.	No
	Persisted Dataset	The persisted dataset's GUID	No
	Person	A person alias GUID	Yes
	Person Badges	A comma-delimited list of person badge GUIDs	No
	Phone Number	A formatted phone number	No
	Prayer Request	A prayer request's GUID	No
	Range Slider	The integer value of the selected number	No





Workflows

Rock does the lookups for you.

Don't worry, you don't see that GUID unless you ask for the raw value.

The screenshot shows the Rock software interface with the following details:

Workflow Detail
Home > Workflows > Add Person Note > Workflow Detail

New Work

Details Tab

Name	New Work
Initiator	Alisha Admin
Status	Completed

Log Section

Activated	52 seconds ago
Last Processed	43 seconds ago
Completed	43 seconds ago

Person Note Spouse Section

Person	Ted Decker
Note	Test Note
Spouse	Cindy Decker

Buttons

- Edit
- Cancel

Notes Section

+



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form

Action: Get Spouse

Action: Add Note

Action: Complete Workflow

The screenshot shows a software interface for managing workflows. On the left is a sidebar with icons for document, person, money, tools, and briefcase. The top right features a search bar, a user profile, and a 'Search' button. The main area is titled 'Create Note'.

Run If: Spouse Is Not Bla

Name: Create Note Action is Completed on Success Activity is Completed on Success

Action Type: Person Note... 'Person Note Add' Overview Adds a note to the selected person.

Person: Spouse

Note Type: Personal Note

Caption: (empty)

Text: {{ Workflow | Attribute:'Note' }} (entered from spouse profile)



Workflows

Workflow

Attributes

Person: Ted Decker

Note: Test Note

...

Activity

Action: Form

Action: Get Spouse

Action: Add Note

Action: Add Spouse Note

Action: Complete Workflow

The screenshot shows a workflow configuration interface with the following details:

- Run If:** Spouse Is Not Bla
- Name:** Create Note
- Action Type:** Person Note... (Overview: Adds a note to the selected person)
- Person:** Spouse
- Note Type:** Personal Note
- Caption:** (empty)
- Text:** {{ Workflow | Attribute:'Note' }} (entered from spouse profile)
- Checkboxes:** Action is Completed on Success (checked), Activity is Completed on Success (unchecked)



Can I get the
person
automatically?





Workflows

Can I get the person automatically?

Yes, if you start it from some context that already has a person.

The screenshot shows a CRM application interface. On the left is a dark sidebar with icons for Home, People, Activities, Tools, and Reports. The main area has an orange header with a search bar and user profile. Below the header is a navigation bar with tabs: Profile (which is active), Extended Attributes, Steps, Groups, Documents, Contributions, and More. The central part of the screen displays a large photo of a smiling man with glasses, identified as 'Ted Decker' (Theodore). Below the photo is his profile information: Male, 44 years old (2/10/1980), Married 21 years (5/8/2003), and Graduated 1984. To the right of the profile are several status indicators: Today, 7 yr, 0 / 16, eRA. Below these are sections for 'Write a note...', 'Alert: Personal Note' (listing a note from Alisha Marble), and 'Test Note' (another note from Alisha Marble). A context menu is open over the profile photo, listing options: Email, Actions (highlighted with a blue border), Edit, Download vCard, Background Check (Checkr) (with a checked checkbox), Person Data Error, Photo Request, and Request Assessment.



Workflows

Can I get the person automatically?

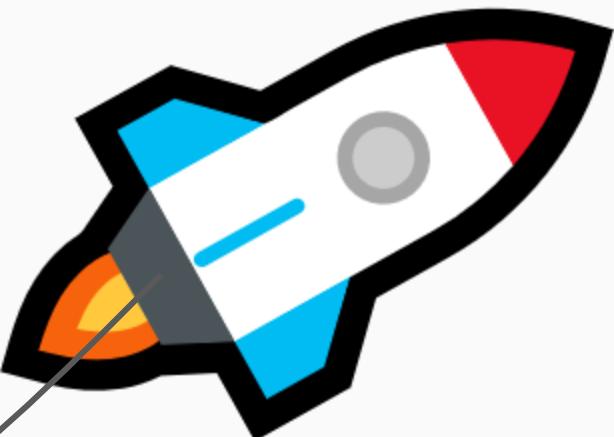
Yes, if you start it from some context that already has a person.

The screenshot shows a CRM application interface. On the left, there's a vertical sidebar with icons for Home, People, Finance, Tools, and Reports. The main area displays a profile for 'Ted Decker' (Theodore), showing his photo, name, gender (Male), age (44 years old, born 2/10/1980), marital status (Married 21 years, since 5/8/2003), and graduation year (Graduated 2004). Below this, there's a context menu with options like 'Download vCard', 'Add Note to Spouses' (which is highlighted with a red arrow), 'Background Check (Checkr)', 'Person Data Error', 'Photo Request', and 'Request Assessment'. The top navigation bar includes tabs for Profile, Extended Attributes, Steps, Groups, Documents, Contributions, and More, along with search and user profile icons. The right side of the screen shows a timeline of activity notes, with one note from 'Alisha Marble' about calling Ted's mother.



Workflow Entity

**Workflows can be
launched with an Entity**



Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note



Workflow Entity

**Workflows can be
launched with an Entity**

It's up to the Workflow
to use it.



Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

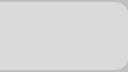


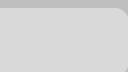
Workflow Entity

Workflow

Attributes

Person: 

Note: 

Spouse: 

Activity

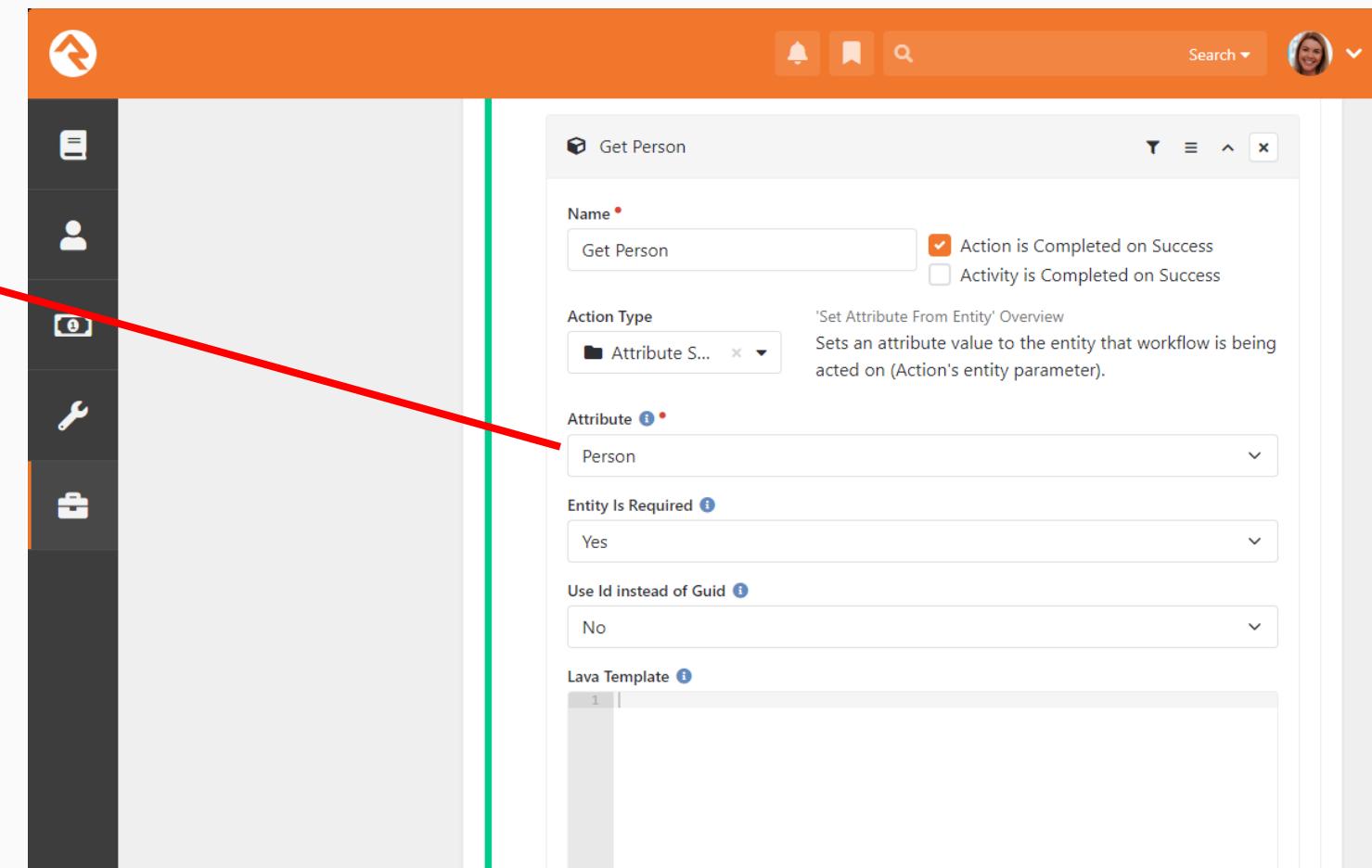
Action: Get Person 

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note



The screenshot shows the RPA Platform's configuration interface for a workflow entity. On the left, there's a sidebar with icons for Home, People, Wallet, Tools, and Projects. The main area has a title bar with the RPA logo, a search bar, and a user profile. A red arrow points from the 'Person' attribute placeholder in the first screenshot to the 'Name' field in the configuration panel. Another red arrow points from the green-bordered 'Activity' section in the first screenshot to the 'Action Type' dropdown in the configuration panel.

Get Person

Name *: Get Person Action is Completed on Success Activity is Completed on Success

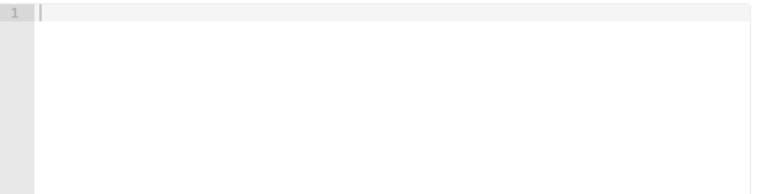
Action Type: Attribute S... 

'Set Attribute From Entity' Overview
Sets an attribute value to the entity that workflow is being acted on (Action's entity parameter).

Attribute: Person

Entity Is Required: Yes

Use Id instead of Guid: No

Lava Template: 



Workflow Entity

Workflow

Attributes

Person: Ted Decker

Note:

Spouse:

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

The screenshot shows a user interface for managing a workflow entity. On the left, a sidebar menu includes icons for Home, People, Money, Tools, and Cases. The main area displays a workflow configuration. A red arrow points from the 'Spouse:' field in the Attributes section of the workflow editor to the 'Spouse' attribute in the configuration panel.

Workflow Entity Configuration Panel:

- Get Spouse:** Action Type: Lava Run. Lava code: `{{ Workflow | Attribute:'Person', 'Object' | Spouse | Property:'PrimaryAlias.Guid' }}`
- Attributes:** Spouse

Workflow Editor:

- Attributes:** Person: Ted Decker
- Activity:** Action: Get Person (checked)
- Activity:** Action: Get Spouse
- Activity:** Action: Form
- Activity:** Action: Add Note
- Activity:** Action: Add Spouse Note



Workflow Entity

Workflow

Attributes

Person: Ted Decker

Note:

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

The screenshot shows a workflow configuration interface with the following sections:

- Form Header**: Contains a single row with a placeholder field.
- Form Fields**: A table with three rows corresponding to the attributes defined in the screenshot. Each row includes a "Field" column (with expand/collapse icons), and columns for "Visible" (checked), "Editable" (unchecked), "Required" (unchecked), "Hide Label" (unchecked), "Pre-HTML" (unchecked), "Post-HTML" (unchecked), and "Logic" (button).
- Form Footer**: Contains a single row with a placeholder field.
- Command Label**: "Submit".
- Button Type**: "Primar" (dropdown menu).
- Activate Activity**: (dropdown menu).
- Response Text**: "Your information has bee" (text input field with an "x" button).



Workflow Entity

Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

Add Note to Spouses

Home > Workflows > Add Note to Spouses

Work Entry

Person
Ted Decker

Spouse
Cindy Decker

Note •
Test Note

Submit



Workflow Entity

Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

Create Note

Name *

Create Note

Action is Completed on Success

Activity is Completed on Success

Action Type

Person Note...

'Person Note Add' Overview

Adds a note the selected person.

Person i *

Person

Note Type i *

Personal Note

Caption i

`{{ Workflow | Attribute:'Note' }}`

Author i

No

Alert i



Workflow Entity

Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

Create Spouse Note

Run If

Spouse Is Not Bla

Name *

Create Spouse Note

Action is Completed on Success

Activity is Completed on Success

Action Type

Person Not...

'Person Note Add' Overview

Adds a note the selected person.

Person

Spouse

Note Type

Personal Note

Caption

Text

{{ Workflow | Attribute:'Note' }} (entered from spouse profile)

Author



Workflow Entity

Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

The screenshot shows a user interface for managing a workflow entity named 'Person: Ted Decker'. The top navigation bar includes icons for bell, bookmark, search, and user profile, along with links for 'Profile', 'Extended Attributes', 'Steps', 'Groups', 'Documents', 'Contributions', and 'More'. The main content area features a large profile picture of a smiling man with glasses. Below the picture, the name 'Ted Decker' is displayed, followed by his title 'Theodore' and status 'Member'. There are three buttons: 'Email', 'Actions', and 'Edit'. To the right of the profile, there is a summary section with icons for 'Today', '7 yr', '0 /16', and 'eRA'. A note input field says 'Write a note...'. Below this, an 'Alert: Personal Note' section lists three entries from 'Alisha Marble': 1. 'Personal Note · 8 years ago' with the note 'Called Ted and heard that his mother is in the hospital and could use prayer.' 2. 'Personal Note · 3 seconds ago' with the note 'Test Note'. 3. Another entry from 'Alisha Marble' with the note 'Talked to Ted today about starting a new Young Adults ministry'.



Workflow Entity

Workflow

Attributes

Person: Ted Decker

Note: Test Note

Spouse: Cindy Decker

Activity

Action: Get Person

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note

The screenshot shows a user interface for managing a workflow entity named Cindy Decker. On the left, there's a sidebar with icons for document, person, money, wrench, and briefcase. The main area has tabs for Profile, Extended Attributes, Steps, Groups, Documents, Contributions, and More. The Profile tab is active, displaying a large photo of Cindy Decker, her name, and her spouse, Cynthia. Below the photo, it shows her gender (Female), age (43 years old, born 3/10/1981), and marriage status (Married 21 years, 5/8/2003). To the right, there are sections for writing notes, viewing activity from other users (Alisha Admin), bookmarked attributes, connection requests, and known relationships.



Workflow Entity

Could I be more specific than
“spouse profile”?

You've got this!



The screenshot shows a user interface for managing a workflow entity. At the top, there's a navigation bar with icons for search, notifications, and user profile. Below the navigation is a toolbar with various buttons. The main area displays a profile for a user named Cindy Decker, Cynthia. The profile includes a photo, a lock icon, and status indicators: 18 yr, 0 / 16, and eRA. Below the profile are sections for "Extended Attributes", "Steps", "Groups", "Documents", "Contributions", and "More". A note from "Alisha Admin" is visible, stating "Test Note (entered from spouse profile)". To the right, there are sections for "Bookmarked Attributes", "Connection Requests", and "Known Relationships". On the far left, there's a vertical sidebar with icons for document, person, money, tools, and briefcase.



Workflows

Could I be more specific than
“spouse profile”?

You've got this!



The screenshot shows the Ravelin Workflow builder interface. On the left is a sidebar with icons for Home, People, Money, Tools, and a briefcase. The main area displays a workflow step titled "Create Spouse Note".
Run If: Spouse Is Not Bla
Name: Create Spouse Note
Action Type: Person Note... (selected) Adds a note to the selected person.
Person: Spouse
Note Type: Personal Note
Caption: (empty)
Text: {{ Workflow | Attribute:'Note' }} (entered from spouse profile)



Workflow Entity

Could I be more specific than “spouse profile”?

You've got this! 🎉

The screenshot shows a workflow editor interface with an orange header containing a logo, a search bar, and a user profile. The main area displays a step titled "Create Spouse Note".
The "Run If" condition is set to "Spouse" and "Is Not Bla".
The "Name" field is "Create Spouse Note".
The "Action Type" is "Person Note Add" (selected).
The "Person" is "Spouse".
The "Note Type" is "Personal Note".
The "Caption" and "Text" fields are empty.
Checkboxes for "Action is Completed on Success" and "Activity is Completed on Success" are present, with the first one checked.
A tooltip for "Person Note Add" says: "'Person Note Add' Overview
Adds a note the selected person."



Workflow Entity

Could I be more specific than
“spouse profile”?

You've got this! 🎉

The screenshot shows a user interface for managing a workflow entity. At the top, there's a navigation bar with icons for search, notifications, and user profile. Below the navigation is a toolbar with various buttons. The main area displays a profile for "Cindy Decker" (Cynthia), showing her photo, name, gender (Female), age (43 years old, born 3/10/1981), and marital status (Married 21 years, since 5/8/2003). There are buttons for "Email", "Actions", and "Edit". To the right of the profile, there are sections for "Extended Attributes" (showing 18 yr, 0 / 16 eRA), "Notes" (with a note from "Alisha Admin" about a test note), "Bookmarked Attributes", "Connection Requests", and "Known Relationships". A sidebar on the left contains icons for document, person, money, tools, and briefcase.



Workflow Entity

What's the “Lava Template” for?

- Property values
- Attribute values
- Related Entities

The screenshot shows the RPA Platform interface with the 'Get Person' workflow entity configuration. The left sidebar has icons for Home, People, Wallet, Tools, and a briefcase. The main area shows the 'Get Person' configuration with the following fields:

- Name ***: Get Person
- Action Type**: Attribute S... (selected)
- Attribute**: Person
- Entity Is Required**: Yes
- Use Id instead of Guid**: No
- Lava Template**: A text input field containing the number 1.

At the top right, there are icons for notifications, bookmarks, search, and user profile. The top bar also includes a 'Search' dropdown and a user photo.



Workflow Entity Java Template

```
1 {{ Entity.NickName }}
```

Attributes Count: 1				
Attribute	Description	Key	Field Type	Required
☰ Person NickName		PersonNickName	Text	 





Workflow Entity Lava Template

```
1 {{ Entity | Attribute:'BaptismDate' }}
```

Attributes Count: 1				
Attribute	Description	Key	Field Type	Required
☰ Baptism Date		BaptismDate	Date	

1/12/2006



Workflow Entity Lava Template

```
1 {{ Entity | Spouse | Property:'PrimaryAlias.Guid' }}
```

Attributes Count: 1				
Attribute	Description	Key	Field Type	Required
☰ Spouse		Spouse	Person	

Cindy Decker (*full entity*)



Workflow Entity

Workflow



Attributes

Person:

Note:

Spouse:

Activity

Action: Attr. from Entity

Action: Form



Important:

The entity isn't available forever.

Make sure to set any attributes from the entity, before the first breaking action.



Workflow Entity

Workflow



Attributes

Person:

Note:

Spouse:

Activity

Action: Form



Action: Attr. from Entity



Important:

The entity isn't available forever.

Make sure to set any attributes from the entity, before the first breaking action.



Workflow Entity

Workflow

Attributes

Person:

Note:

Spouse:



Activity

Action: Form

Action: Attr. from Entity 



Make sure to set any attributes from the entity, before the first breaking action.



Important:

The entity isn't available forever.



Workflow Entity

Entities are provided from other places too!

- Reports



Note:

The entity type will be the same as the Report's Entity Type

The screenshot shows the Zoho Reports interface. The left sidebar has icons for Reports, People, Finance, Tools, and Folders. The main area is titled 'Reports' with a breadcrumb 'Home > Reports'. A sidebar on the left under 'Report' shows 'Foundational Reports' with 'Member & Attendees' selected, and 'Organization' below it. The main content area is titled 'Member & Attendees' with a description: 'Lists people whose record status is 'Active' and connection status is 'Member' or 'Attendee''. It shows 'Category: Foundational Reports' and 'Data View: Member & Attendees'. Below is an 'Edit' button and a 'Delete' button. At the bottom is a 'Report Data' table with columns: Name, Gender, and Age. The table contains three rows: Ted Decker (Male, 44), Cindy Decker (Female, 43), and an unselected row. A red circle highlights the gear icon in the top right corner of the report data table.

Name	Gender	Age
Ted Decker	Male	44
Cindy Decker	Female	43
[Unselected]		



Workflow Entity

Entities are provided from other places too!

- Reports



Note:

A separate workflow is launched for each row, so each workflow gets ONE entity.

The screenshot shows the Pega Reports interface. The left sidebar has icons for Home, Reports, Data View, and System. The main area is titled "Reports" with a breadcrumb "Home > Reports". A sidebar on the left lists "Report" categories: "Foundational Reports" (selected, showing "Member & Attendees" and "Organization"), "Data View", and "System". The main panel is titled "Member & Attendees" and contains the following information:

- Description: "Lists people whose record status is 'Active' and connection status is 'Member' or 'Attendee'." (Status: Not Run Since Creation)
- Category: Foundational Reports
- Data View: Member & Attendees
- Action buttons: Edit, Delete, Print, Lock

The "Report Data" section shows a table with three rows:

	Name	Gender	Age
<input checked="" type="checkbox"/>	Ted Decker	Male	44
<input type="checkbox"/>	Cindy Decker	Female	43

At the bottom right of the report data table, there is a gear icon with a red circle around it, indicating a configuration or settings option.



Workflow Entity

Entities are provided from other places too!

- Reports
- Group Member Lists



Note:

The Entity will be a Group Member record, not a person.

The screenshot shows a software application interface for managing groups. On the left, a sidebar titled 'Groups' lists various groups under 'Section B': Global Connector Group, Section A, Section B, ASU Student Group (which is selected and highlighted in blue), Gilbert Group, Greggs Group, Marble Group, Serving Teams, Ushers, and General Groups. The main content area displays the details for the 'ASU Student Group'. It includes a description: 'We hang out and study the bible in an informal way.', and sections for 'Parent Group' (Section B) and 'Topic' (Students of the Bible). At the bottom, there are 'Edit' and 'Archive' buttons, and a toolbar with icons for refresh, checkmark, location, and lock. Below this, the 'Group Members' section shows a table with columns for Name, Role, and Member Status. Two entries are listed: Ty McClintock (Member, Active) and Paul Smith (Member, Active). The gear icon in the table header and the edit button are circled in red.

Name	Role	Member Status
Ty McClintock	Member	Active
Paul Smith	Member	Active



Workflow Entity

Entities are provided from other places too!

- Reports
- Group Member Lists
- Other Grids

The screenshot shows a software interface for managing transactions. The main title is "Transactions" under "Home > Transactions". The left sidebar has icons for Home, People, Wallet, Tools, and Folders. The main area is titled "Transaction List" with a date range of "1/1/2024 to 12/31/2024". It displays one transaction: "Decker, Ted" on "9/15/2024 12:00:00 AM" for "\$100.00" via "Check", batched under "282" with account "General Fund: \$100.00". A summary at the bottom shows "1 Transaction Detail". The top right of the grid has three icons: a gear (highlighted with a red circle), a grid, and a document. The bottom right shows a "Total Results" section with "General Fund Total: \$100.00".

Person	Date	Amount	Currency Type	Transaction Code	Batch Id	Accounts	Summary
Decker, Ted	9/15/2024 12:00:00 AM	\$100.00	Check		282	General Fund: \$100.00	1 Transaction Detail

Total Results	
General Fund Total:	\$100.00



Workflow Entity

Entities are provided from other places too!

- Reports
- Group Member Lists
- Other Grids
- Dataview to Workflow Job
- (and more...)

The screenshot shows the 'Add Service Job' configuration screen. The left sidebar has icons for Reports, Group Member Lists, Other Grids, Dataview to Workflow Job, and (and more...). The main form fields are:

- Name** (required): DataView to Workflow
- Active**: checked
- Description**: Starts a workflow for each entity in the specified Data View.
- Notification Status**: All
- Cron Expression**: 0 0 ? * /1 TUE#1 *
- Cron Description**: At 07:00 AM, on the first Tuesday of the month
- Notification Emails**: (empty field)
- Job Type**: DataView To Workflow
- Job History Count**: 500
- Data View**: Member & Attendees
- Workflow**: Photo Request



Workflow Capabilities

More about Lava Run





More about Lava Run

Run Lava

Name *
 Action is Completed on Success
 Activity is Completed on Success

Action Type
 x ▾

'Lava Run' Overview
Runs the provided Lava template and sets an attribute's value to the result.

Lava i *

```
1 {{ 'Hello World' | Upcase }}
```

Attribute i
 ▼



More about Lava Run

Run Lava

Name • Run Lava

Action is Completed on Success Activity is Completed on Success

Action Type Lava Run

'Lava Run' Overview Runs the provided Lava template and sets an attribute's value to the result.

Lava i • {{ 'Hello World' | Upcase }}

Attribute i Run Lava Results

Enabled Lava Commands i

<input type="checkbox"/> All	<input type="checkbox"/> Execute	<input type="checkbox"/> Rock Entity
<input type="checkbox"/> Adaptive Message	<input type="checkbox"/> Interaction Content Channel Item Write	<input type="checkbox"/> Search
<input type="checkbox"/> Cache	<input type="checkbox"/> Interaction Intent Write	<input type="checkbox"/> Sql
<input type="checkbox"/> Calendar Events	<input type="checkbox"/> Interaction Write	<input type="checkbox"/> Web Request
<input type="checkbox"/> Event Scheduled Instance	<input type="checkbox"/> Observe	<input type="checkbox"/> Workflow Activate



Lava Run Commands

```
1  {% person id:'5' %}  
2    {{ person.PrimaryAlias.Guid }}  
3  {% endperson %}
```

Enabled Lava Commands ⓘ

<input type="checkbox"/> All	<input type="checkbox"/> Execute	<input checked="" type="checkbox"/> Rock Entity
<input type="checkbox"/> Adaptive Message	<input type="checkbox"/> Interaction Content Channel Item Write	<input type="checkbox"/> Search
<input type="checkbox"/> Cache	<input type="checkbox"/> Interaction Intent Write	<input type="checkbox"/> Sql
<input type="checkbox"/> Calendar Events	<input type="checkbox"/> Interaction Write	<input type="checkbox"/> Web Request
<input type="checkbox"/> Event Scheduled Instance	<input type="checkbox"/> Observe	<input type="checkbox"/> Workflow Activate

Ted Decker (*entity*)

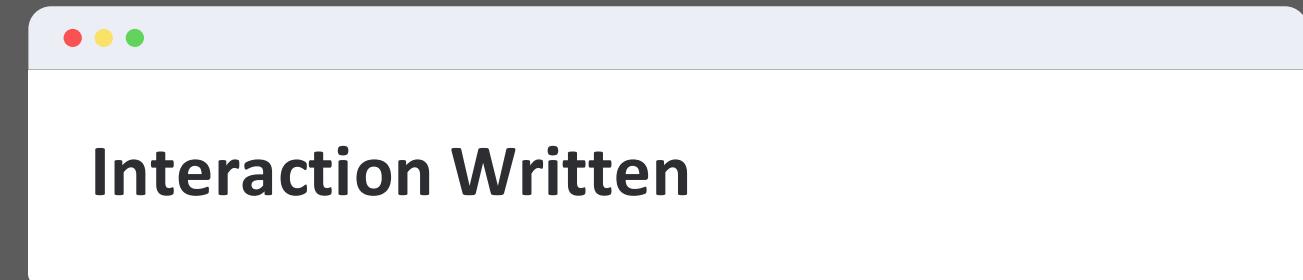


Lava Run Commands

```
1  {% interactionwrite channelname:'Reported People' componentname:'My Workflow' operation:'Reported' %}  
2    {% Workflow | Attribute:'Reason' %}  
3  {% endinteractionwrite %}  
4 Interaction Written
```

Enabled Lava Commands ⓘ

<input type="checkbox"/> All	<input type="checkbox"/> Execute	<input type="checkbox"/> Rock Entity
<input type="checkbox"/> Adaptive Message	<input type="checkbox"/> Interaction Content Channel Item Write	<input type="checkbox"/> Search
<input type="checkbox"/> Cache	<input type="checkbox"/> Interaction Intent Write	<input type="checkbox"/> Sql
<input type="checkbox"/> Calendar Events	<input checked="" type="checkbox"/> Interaction Write	<input type="checkbox"/> Web Request
<input type="checkbox"/> Event Scheduled Instance	<input type="checkbox"/> Observe	<input type="checkbox"/> Workflow Activate



A screenshot of a web browser window. The title bar shows three colored dots (red, yellow, green). The main content area displays the text "Interaction Written" in a large, bold, black font.



Alternative for Writing Interactions

Write Interaction

Name *
 Action is Completed on Success
 Activity is Completed on Success

Action Type
 'Interaction Add' Overview
Writes to the interactions table

InteractionChannel Name, Id, or Guid i
 or

Component Name, Id, or Guid i
 or

Component Entity Id i
 or

Person Alias Id or Guid i
 or

Operation i *

Interaction Summary i
 or

Interaction Data i
 or



Lava Run Commands

```
1  {% sql %}  
2  SELECT  
3      count(1) AS [deckerCount]  
4  FROM  
5      [Person]  
6  WHERE  
7      [LastName] = 'Decker'  
8  {% endsql %}  
9  {{ results[0].deckerCount }}
```

Enabled Lava Commands i

<input type="checkbox"/> All	<input type="checkbox"/> Execute	<input type="checkbox"/> Rock Entity
<input type="checkbox"/> Adaptive Message	<input type="checkbox"/> Interaction Content Channel Item Write	<input type="checkbox"/> Search
<input type="checkbox"/> Cache	<input type="checkbox"/> Interaction Intent Write	<input checked="" type="checkbox"/> Sql
<input type="checkbox"/> Calendar Events	<input type="checkbox"/> Interaction Write	<input type="checkbox"/> Web Request
<input type="checkbox"/> Event Scheduled Instance	<input type="checkbox"/> Observe	<input type="checkbox"/> Workflow Activate





Alternative for Running SQL

Run SQL

Name • Run SQL Action is Completed on Success Activity is Completed on Success

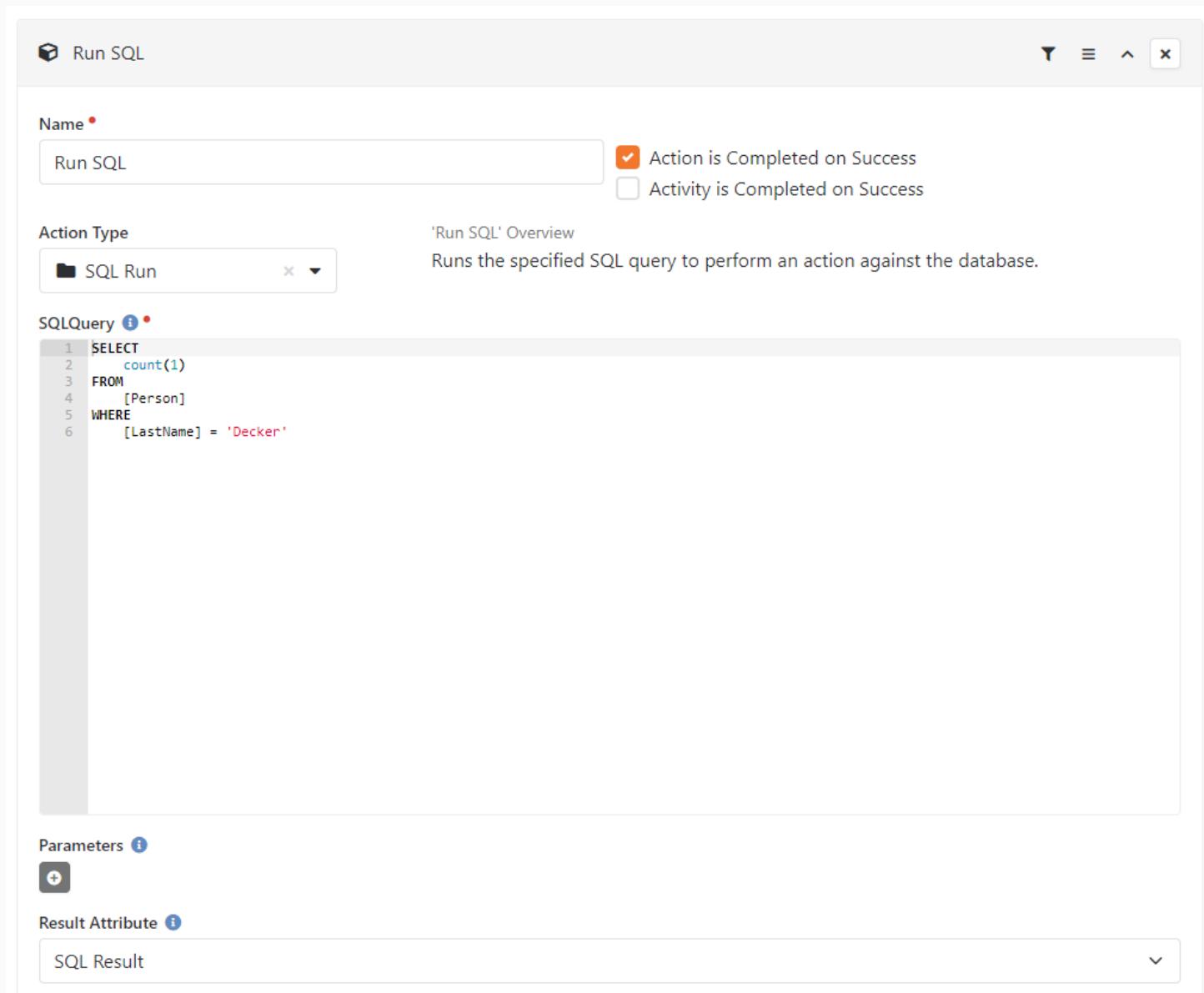
Action Type SQL Run 'Run SQL' Overview Runs the specified SQL query to perform an action against the database.

SQLQuery ⓘ •

```
1 SELECT
2     count(1)
3     FROM
4     [Person]
5     WHERE
6         [LastName] = 'Decker'
```

Parameters +

Result Attribute ⓘ SQL Result



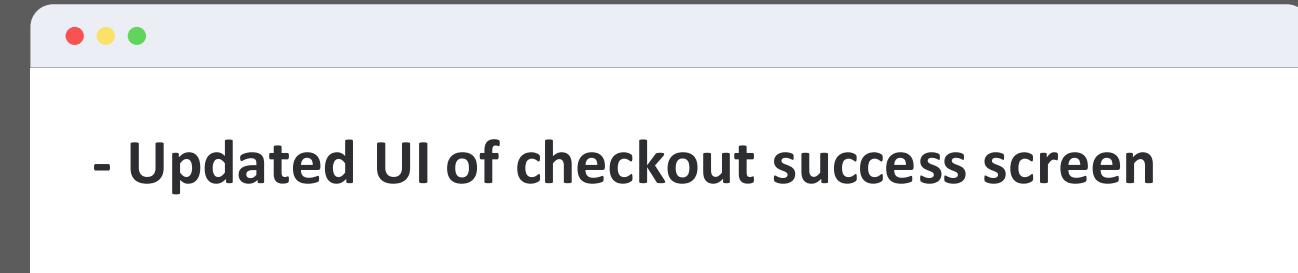


Lava Run Commands

```
1  {% webrequest url:'https://api.github.com/repos/SparkDevNetwork/Rock/commits/develop' %}  
2    {{ results[0].commit.message }}  
3  {% endwebrequest %}
```

Enabled Lava Commands ⓘ

<input type="checkbox"/> All	<input type="checkbox"/> Execute	<input type="checkbox"/> Rock Entity
<input type="checkbox"/> Adaptive Message	<input type="checkbox"/> Interaction Content Channel Item Write	<input type="checkbox"/> Search
<input type="checkbox"/> Cache	<input type="checkbox"/> Interaction Intent Write	<input type="checkbox"/> Sql
<input type="checkbox"/> Calendar Events	<input type="checkbox"/> Interaction Write	<input checked="" type="checkbox"/> Web Request
<input type="checkbox"/> Event Scheduled Instance	<input type="checkbox"/> Observe	<input type="checkbox"/> Workflow Activate





Alternative for Web Requests

Web Request

Name • Action is Completed on Success Activity is Completed on Success

Action Type 'Web Request' Overview
Makes web requests to the endpoint of your choice.

Method ⓘ •

URL ⓘ •

Parameters

Headers

Basic Auth UserName

Basic Auth Password

Request Content Type • JSON XML

Response Content Type • JSON XML HTML



Workflow Capabilities

Filtering Workflow Actions





Workflow Action Filters

Not every action in an activity has to run.

Attribute Values can be used to “filter” which actions run.

Actions + Add Action

Get Initial Input From User	☰	≡	▼	✖
Persist Workflow	☰	≡	▼	✖
Set Requestor	☰	≡	▼	✖
Set Workflow Name	☰	≡	▼	✖
Get Full-time Details	☰	≡	▼	✖
Set Full-time Hours to 40	☰	≡	▼	✖
Get Part-time Details	☰	≡	▼	✖
Send to HR for Additional Fields	☰	≡	▼	✖

A vertical green bar is positioned to the left of the first three rows of the table. A red rounded rectangle highlights the last three rows of the table.



Workflow Action Filters

Not every action in an activity has to run.

Attribute Values can be used to “filter” which actions run.



Important Information:

The value to compare is the Raw Value.

Attributes Count: 10

Attribute	Description	Key	Field Type	Required
Type	If the employee will be full-time or part-time.	Type	Single-Select	

Get Full-time Details

Run If

Type	Equal To
Text Value	Full-time
or	Attribute Value

Name •

Get Full-time Details

Action is Completed on Success

Activity is Completed on Success

Action Type

Form



Workflow Action Filters

What about single- and multi-selects?

As the workflow type designer,
you set the Raw Value

Workflow Attributes Id: 1248 X

Edit attribute for workflows of workflow type Position Approval

Name • Active i
 Type

Abbreviated Name Public i
 Type

Description
If the employee will be full-time or part-time.

Categories Field Type

Key Single-Select
Type

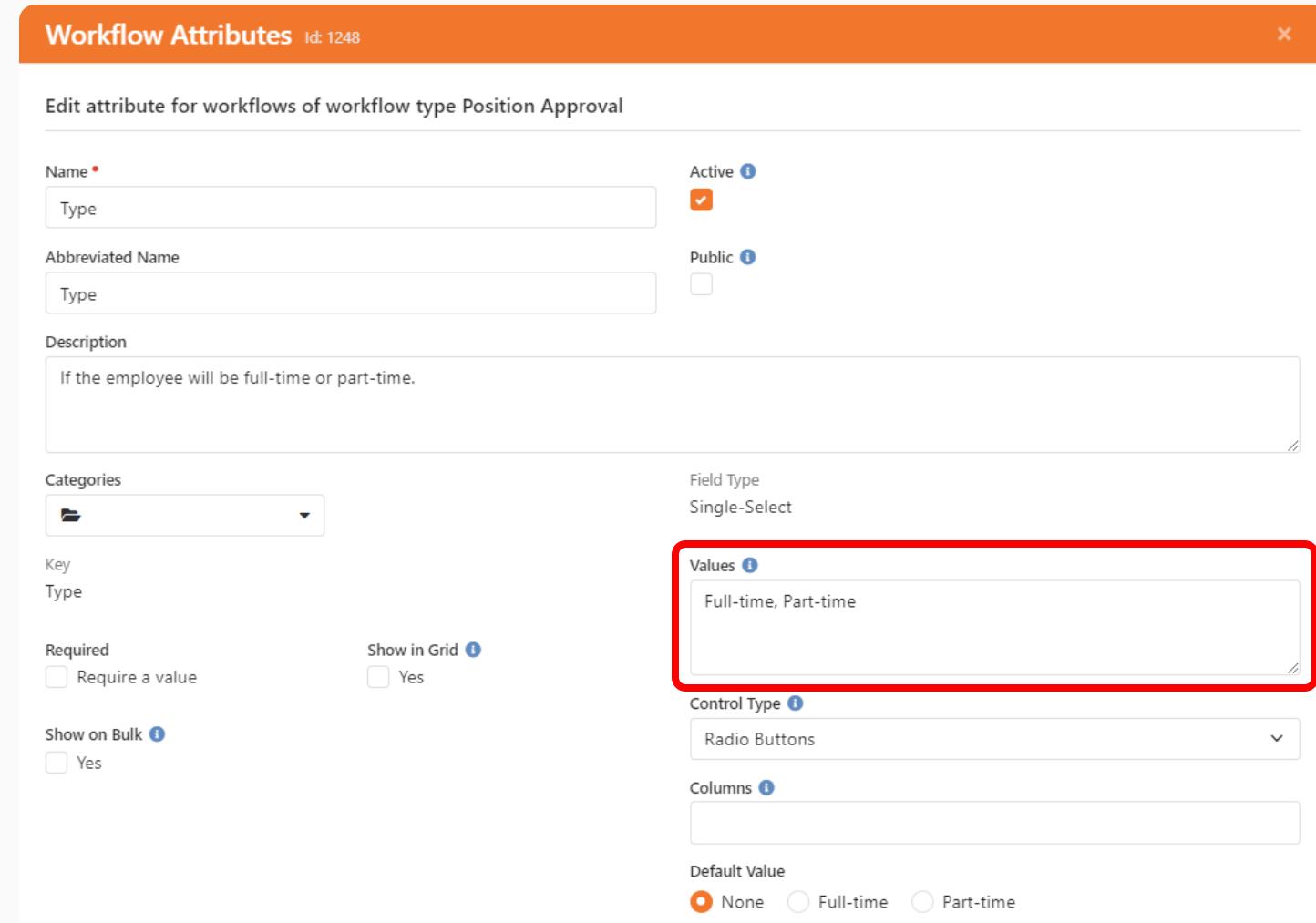
Required Show in Grid i
 Require a value Yes

Show on Bulk Control Type i
 Yes

Values Columns i

Full-time, Part-time

Default Value Default Value i
 None Full-time Part-time





Workflow Action Filters

Field Type
Single-Select

Values ⓘ
Full-time, Part-time

The screenshot shows a workflow action configuration window. At the top, there's a section labeled "Run If" with a dropdown menu set to "Type". Below it, there are two input fields: "Text Value" containing "Full-time" and "Attribute Value" which is currently empty. A small orange "or" connector is visible between the two fields. The entire configuration is highlighted with a yellow background.

Format 1: Commas

If you use this format, the RawValue will be the full text of the selected option.

“Full-time” or “Part-time”



Workflow Action Filters

Field Type
Single-Select

Values i

1^Full-time,2^Part-time

The screenshot shows a workflow action configuration window. At the top, it says "Get Full-time Details". Below that, under "Run If", there is a dropdown menu set to "Type" and another dropdown set to "Equal To". There are two input fields: "Text Value" containing "1" and "Attribute Value" which is currently empty. A small "or" button is located between the two input fields.

Format 2: Value^Text

If you use this format, the RawValue will be the “Value”.

“1” or “2”



Workflow Action Filters

Field Type
Single-Select

Values i

full^Full-time,part^Part-time

Get Full-time Details

Run If i

Type: Equal To

Text Value: full

Attribute Value:

or

Format 2: Value^Text

If you use this format, the RawValue will be the “Value”.

“full” or “part”



Workflow Action Filters

Field Type

Single-Select

Values i

```
{% assign values = '82' | FromCache:'DefinedType' |  
Property:'DefinedValues' %}  
{% for value in values %}  
{{ value.Id }}^{{ value.Value }}  
{% if forloop.last == False %},{% endif %}  
{% endfor %}
```

The screenshot shows a workflow action configuration. At the top, there's a title bar with a gear icon and the text "Get Full-time Details". Below it is a "Run If" condition block. The condition is set to "Type" (selected from a dropdown) and "Equal To" (also selected from a dropdown). The "Text Value" field contains the number "778". There is also an "Attribute Value" field and an "or" connector, though they are currently empty.

Format 2a: Lava

If you use this format, the RawValue will be the “Value”.

(In this example, the Id)



Workflow Action Filters

Field Type
Single-Select

Values i

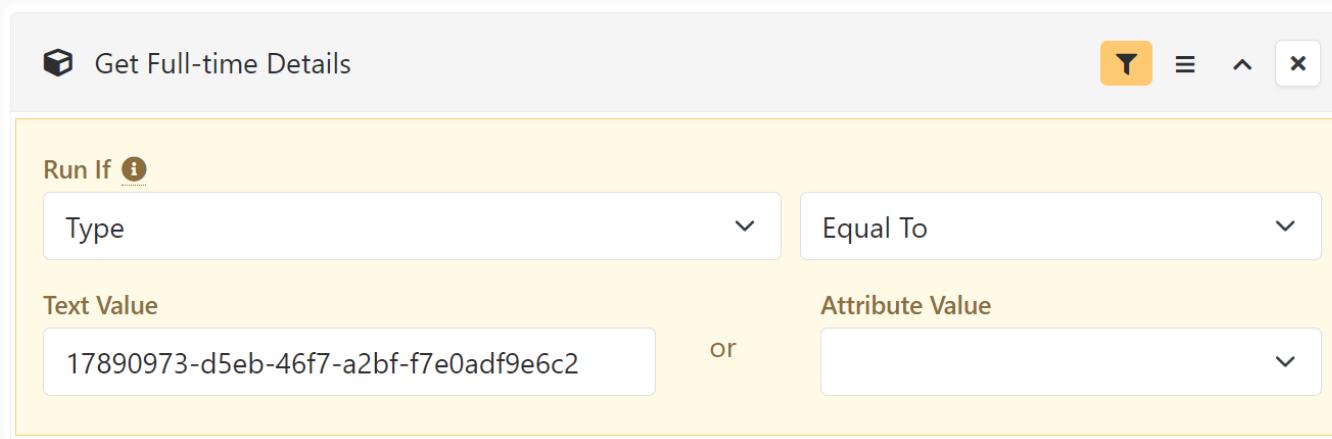
```
SELECT
    [Guid] AS [Value]
    , [Value] AS [Text]
FROM [DefinedValue]
WHERE [DefinedTypeId] = 82
```

Get Full-time Details

Run If i

Type Equal To

Text Value: 17890973-d5eb-46f7-a2bf-f7e0adf9e6c2 or Attribute Value



Format 3: SQL

If you use this format, the RawValue will be the “Value”.

(In this example, the GUID)



Workflow Action Filters

Field Type
Single-Select

Values i

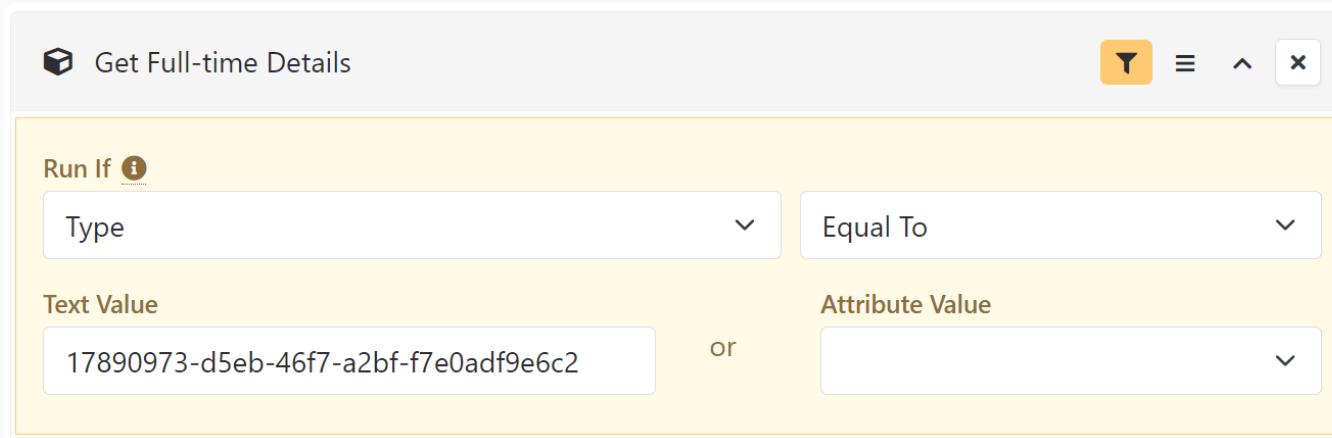
```
SELECT
    [Guid] AS [Value]
    , [Value] AS [Text]
FROM [DefinedValue]
WHERE [DefinedTypeId] = 82
```

Get Full-time Details

Run If i

Type ▼ Equal To ▼

Text Value 17890973-d5eb-46f7-a2bf-f7e0adf9e6c2 or Attribute Value ▼



Format 3: SQL

If you use this format, the RawValue will be the “Value”.



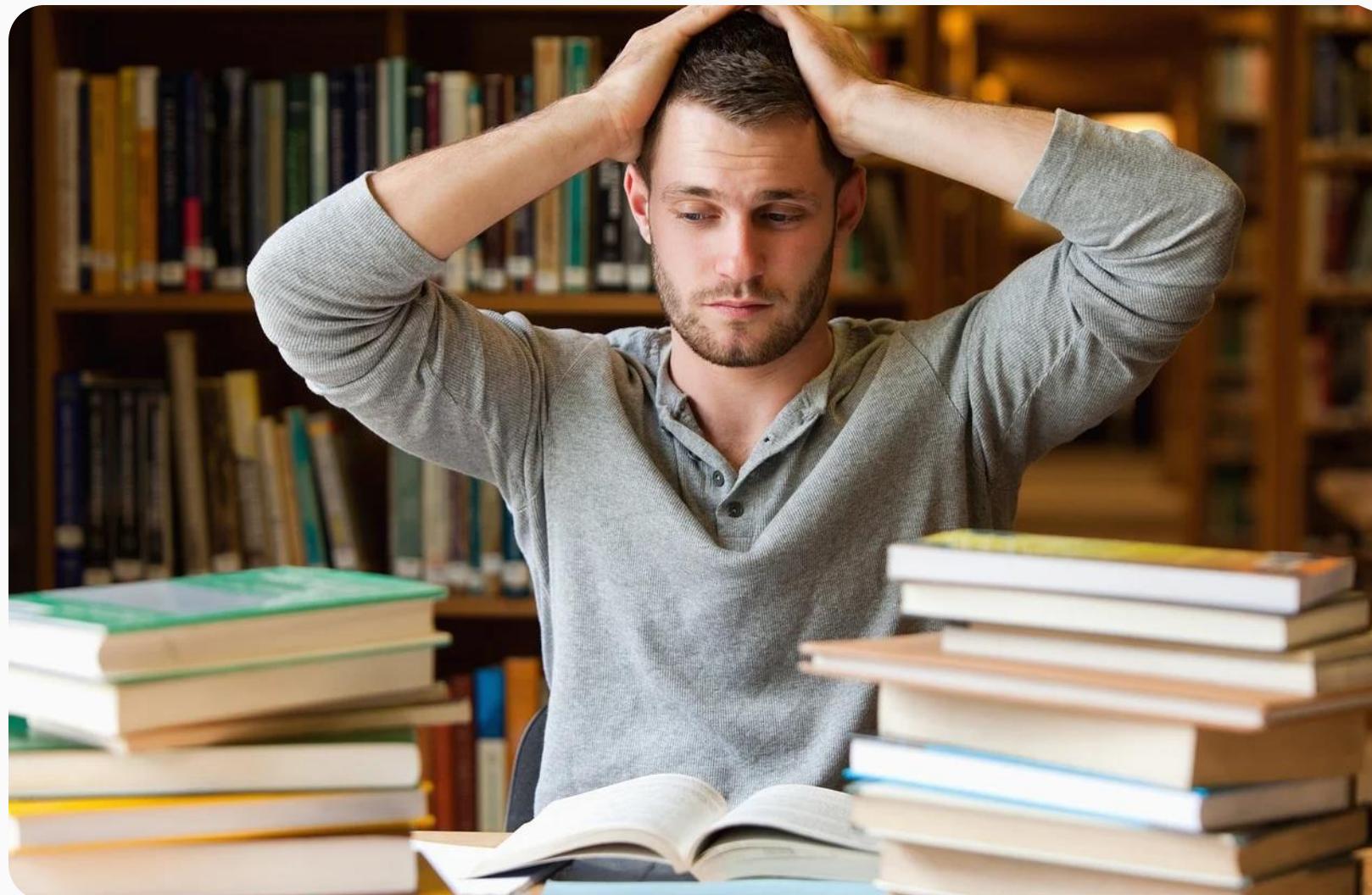
Tip:

GUIDs are convenient because you can assign it to an attribute and get the full record



Workflows

It's hard to look at
the GUID later and
understand what
I'm matching...





Workflows

Rock gives us lots
of options!





Workflow Action Filters

Workflow Attributes Id: 0

Add attribute for workflows of workflow type Position Approval

Name *

Full Time Value

Active i



Abbreviated Name

Public i



Description

Default value is the "Full Time" defined value - this makes it easier to match in a filter. Don't show this value in a form.

Categories



Key *

FullTimeValue

Field Type



Required

Require a value

Show in Grid i

Yes

Show on Bulk i

Yes

Allow Multiple Values i

Yes

Display Descriptions i

Yes

Alternative: make another attribute

Set the default value to what you want to match.



Workflow Action Filters

Show on Bulk ⓘ Yes

Display Descriptions ⓘ Yes

Enhance For Long Lists ⓘ Yes

Include Inactive ⓘ Yes

Allow Adding New Values ⓘ Yes

Repeat Columns ⓘ

Selectable Values Full-time Part-time

Default Value ▾

Advanced Settings

Save **Save Then Add** **Cancel**

Alternative: make another attribute

Set the default value to what you want to match.



Workflow Action Filters

The screenshot shows a 'Get Full-time Details' workflow action. Under the 'Run If' section, there are two filter criteria separated by an 'or' connector. The first criterion has 'Type' selected in the dropdown and 'Equal To' as the operator. The second criterion, which is highlighted with a red box, has 'Attribute Value' selected in the dropdown and 'Full Time Value' as the raw value. Both dropdowns have a downward arrow icon indicating they are expandable.

Easy

Format 3: SQL

Now we don't need to *type* the Raw Value; just pick the attribute whose raw value equals what you want to match.



Multiple Filters

Attributes Count: 3

Attribute	Description	Key	Field Type	Required
Person	Person	Person	Person	
Baptism Date	BaptismDate		Date	
Connection Status	ConnectionStatus	Defined Value		

How can I send an email if a person is both a Member, and Baptized?



Multiple Filters

Send Email if person is a member and baptized

Run If: Person

Equal To: and baptized

Text Value: or Attribute Value:

Action is Completed on Success (checked)

Action is Completed on Success (unchecked)

Action Type: Email Send

'Send Email' Overview: Sends an email. The recipient(s) can either be a person, email address, group or security role determined by the 'To Attribute' value, or one or more email addresses entered in the 'Send To Email Addresses' field. Only people with an active email address without the 'Do Not Email' preference are included. If the 'To Attribute' value is a group, only members with an Active member status are included.



Multiple Filters

Send Email if person is a member and baptized

Run If: Person

Equal To: And baptized

Text Value: or

Attribute Value:

Action Type: Email Send

'Send Email' Overview
Sends an email. The recipient(s) can either be a person, role determined by the 'To Attribute' value, or one or more people selected in the 'Send To Email Addresses' field. Only people with an 'Do Not Email' preference are included. If the 'To Attribute' is set to 'Person', then only members with an Active member status are included.

Action is Completed

Activity is Completed on Site

Only one attribute filter...





Multiple Filters

Workflow Attributes Id: 0 ×

Add attribute for workflows of workflow type

Name *

Active i

Abbreviated Name

Public i

Description

Categories

Field Type

Key *

True Text i

Required
 Require a value

Show in Grid i
 Yes

False Text i

Show on Bulk i
 Yes

Control Type i

Default Value



Multiple Filters

Calculate if Email should be sent ▼ □ ^ ×

Name *
Calculate if Email should be sent

Action is Completed on Success Activity is Completed on Success

Action Type
 Lava Run x ▾

'Lava Run' Overview
Runs the provided Lava template and sets an attribute's value to the result.

Lava i *

```
1 1<% assign baptismDate = Workflow | Attribute:'Person', 'Object' | Attribute:'BaptismDate' %>
2 2<% assign connectionStatus = Workflow | Attribute:'Person', 'ConnectionStatusValue' %>
3 
4 4<% if baptismDate != '' and connectionStatus.Value == 'Member' %>
5 5    True
6 6<% else %>
7 7    False
8 8<% endif %>
```

Attribute i

Baptized and Member ▼



Multiple Filters

Calculate if Email should be sent

Name •
Calculate if Email should be sent

Action is Completed on Success Activity is Completed on Success

Action Type
Lava Run

'Lava Run' Overview
Runs the provided Lava template and sets an attribute's value to the result.

Lava •

```
1 1% assign baptismDate = Workflow | Attribute:'Person', 'Object' | Attribute:'BaptismDate' %}
2 2% assign connectionStatus = Workflow | Attribute:'Person', 'ConnectionStatusValue' %

3 4% if baptismDate != '' and connectionStatus.Value == 'Member' %
4 5    True
5 6% else %
6 7    False
7 8% endif %}
```

Attribute
Baptized and Member



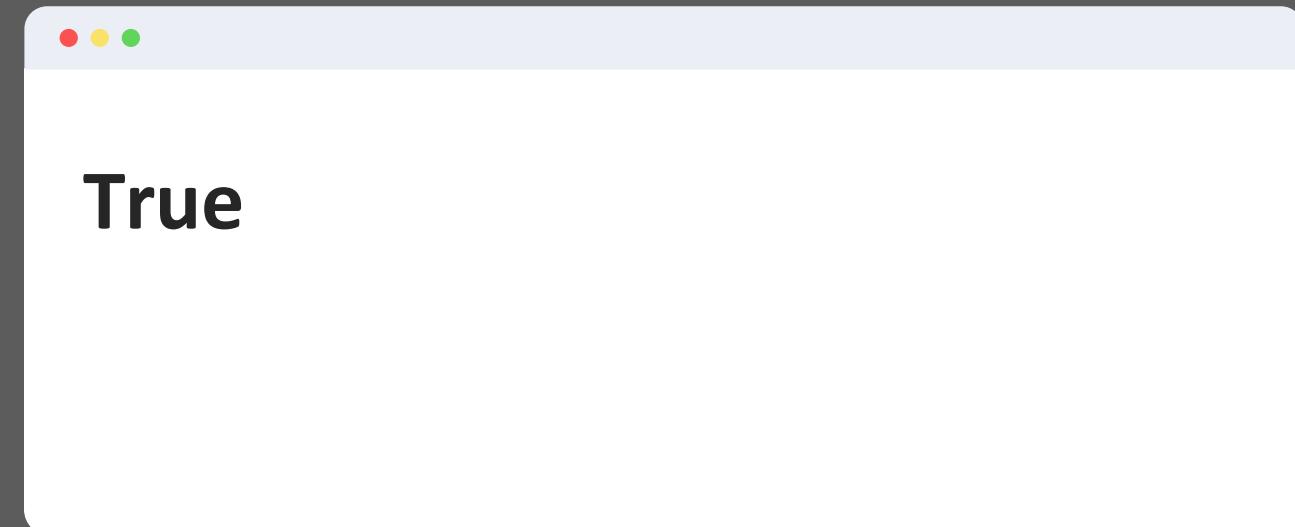
Tip:

You shouldn't check the text.
It's better to check the Id or
something that doesn't change.



Multiple Filters

```
1  {% assign baptismDate = Workflow | Attribute:'Person','Object' | Attribute:'BaptismDate' %}  
2  {% assign connectionStatus = Workflow | Attribute:'Person','ConnectionStatusValue' %}  
3  {% assign memberStatusId = 65 %}  
4  
5  {% if baptismDate != '' and connectionStatus.Id == memberStatusId %}  
6      True  
7  {% else %}  
8      False  
9  {% endif %}
```





Multiple Filters

Send Email if person is a member and baptized

Run If i

Baptized and Member Equal To

Text Value or Attribute Value

Name •

Send Email if person is a member and baptized

Action is Completed on Success Activity is Completed on Success

Action Type

Email Send

