



## 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:

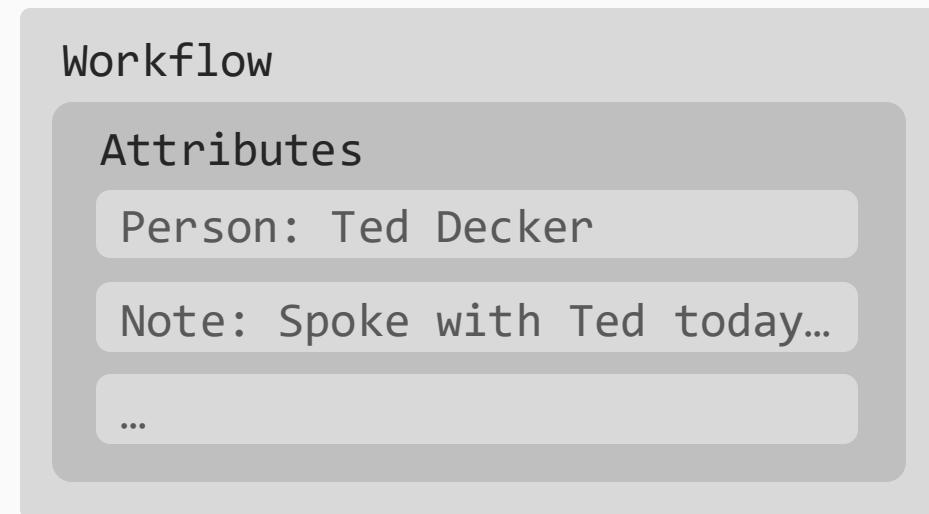
Workflows use Attributes to store information while they're running.





# 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	
☰ Note		Note	Memo	



# 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

Rivet logo icon

Search ▾

**Start** Id: 71 ☰ ✖

**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:

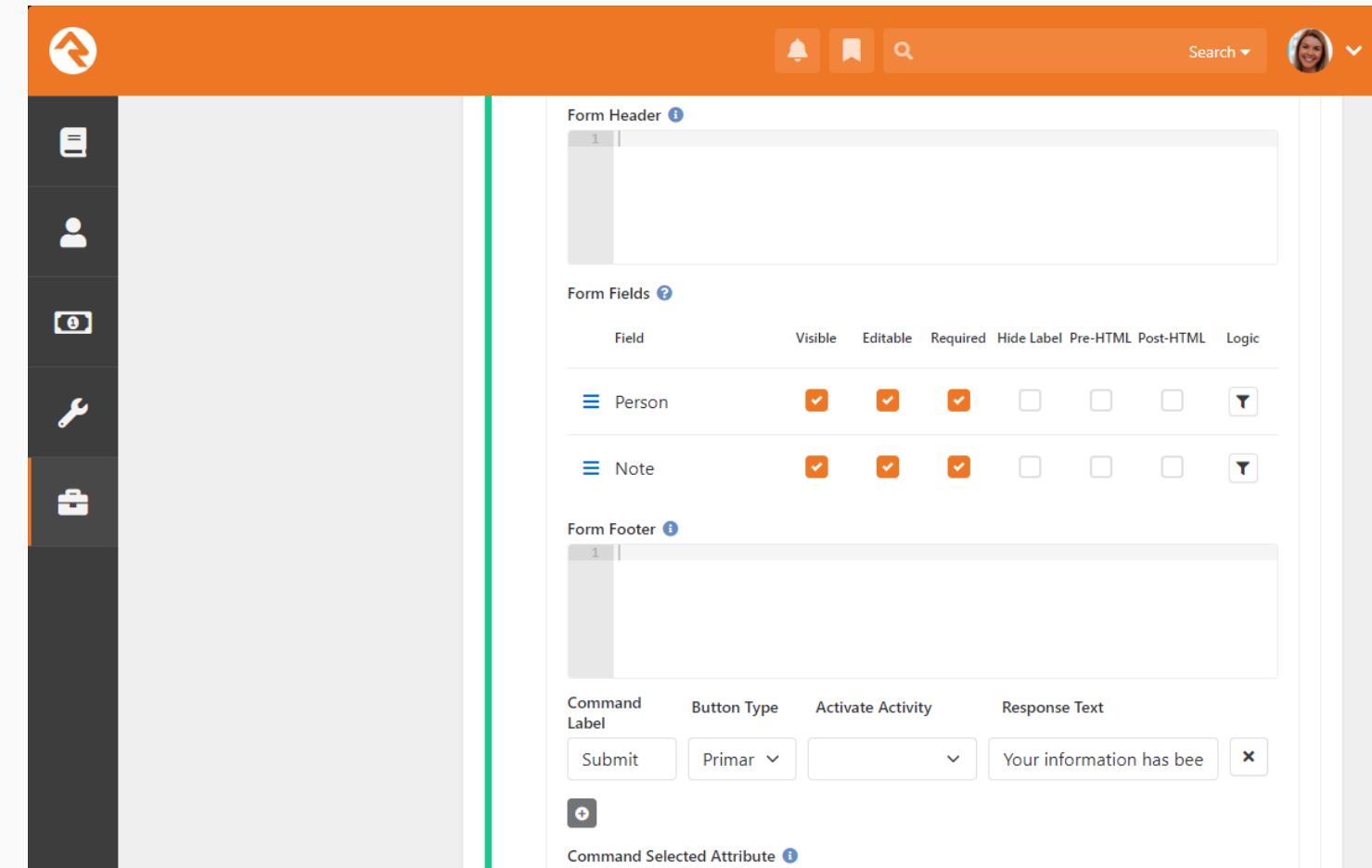
...

### Activity

Action: Form 

Action: Add Note

Action: Complete Workflow



The screenshot shows a user interface for configuring workflows. On the left is a sidebar with icons for document, person, money, tools, and briefcase. The main area has a light gray background. A vertical green line separates the main area from a right panel. The right panel has an orange header with a logo, a search bar, and a user profile. It contains sections for 'Form Header', 'Form Fields', and 'Form Footer'. Under 'Form Fields', there are two rows for 'Person' and 'Note'. Each row has columns for Field, Visible, Editable, Required, Hide Label, Pre-HTML, Post-HTML, and Logic. Under 'Form Footer', there are sections for Command Label, Button Type, Activate Activity, Response Text, and a Command Selected Attribute section.

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"/>	

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

Command Selected Attribute 



# Workflows

## Workflow

### Attributes

Person:

Note:

...

### Activity

Action: Form 

Action: Add Note

Action: Complete Workflow

Add Person Note

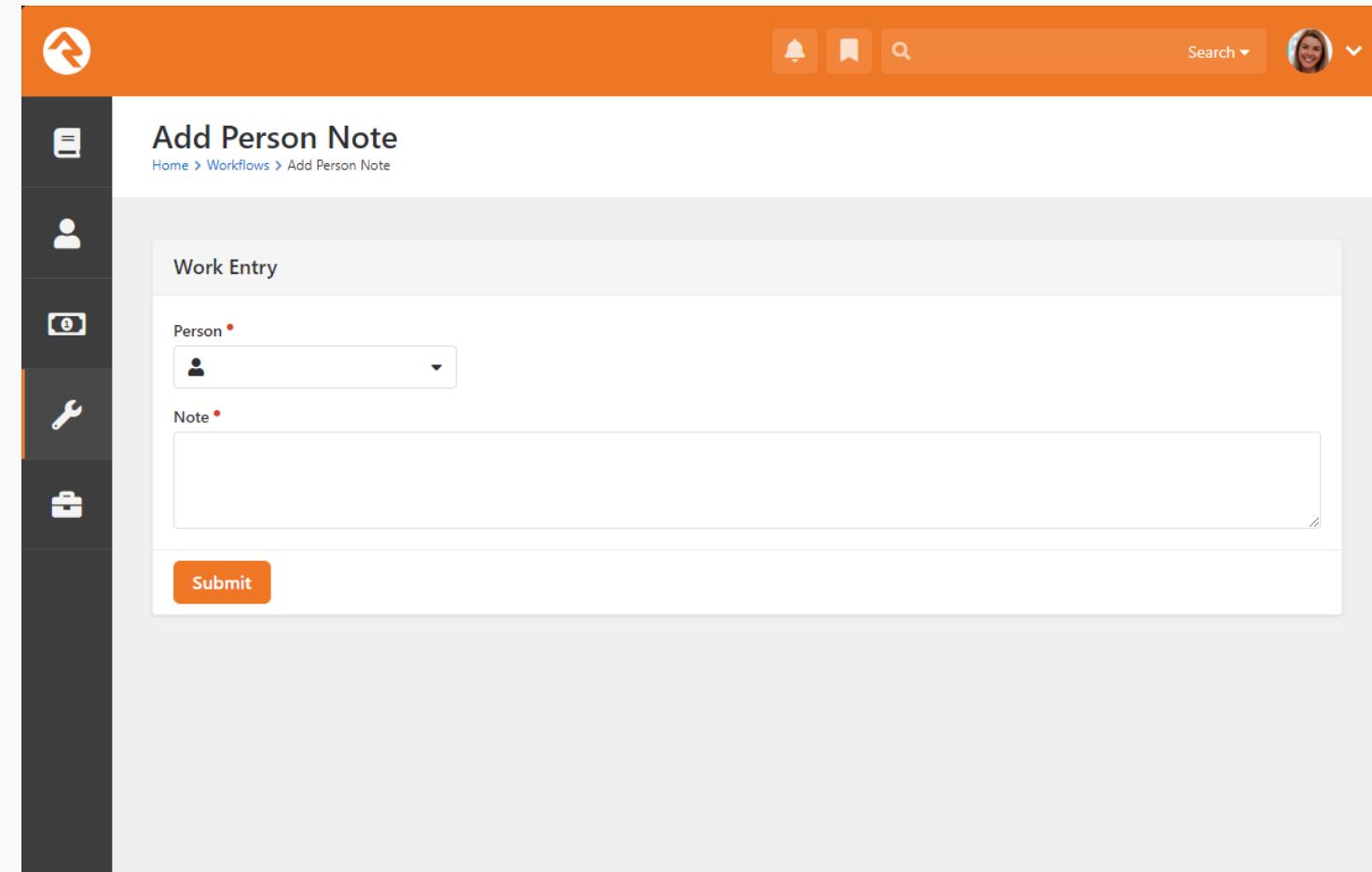
Home > Workflows > Add Person Note

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

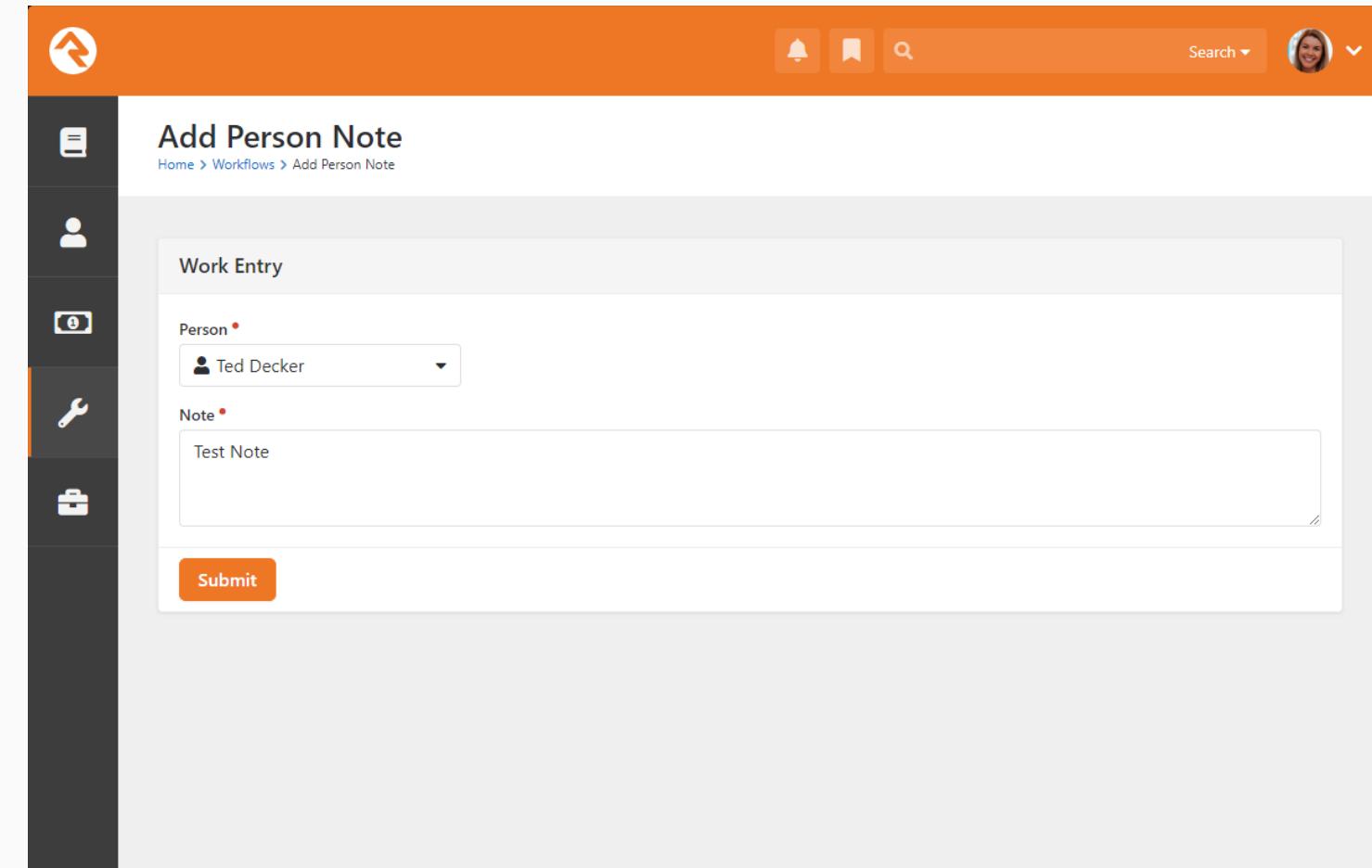
Person \*

Ted Decker

Note \*

Test Note

Submit





# Workflows

## Workflow

### Attributes

Person: Ted Decker

Note: Test Note

...

### Activity

Action: Form

Action: Add Note

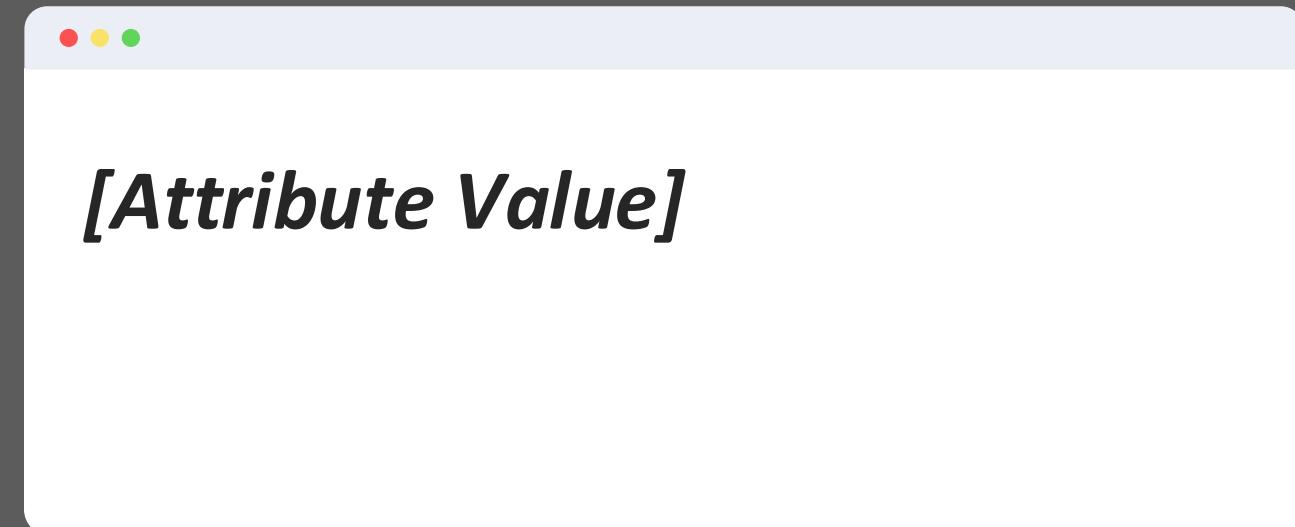
Action: Complete Workflow

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 picture. 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", "Text" (a large red-bordered text area), and "Author". 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."



# 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 header with a logo, a bell icon, a bookmark icon, a search bar, and a user profile. The central panel is titled "Create Note" and contains the following fields:

- Name \***: Create Note  Action is Completed on Success  Activity is Completed on Success
- Action Type**: Person Not... '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)



# 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 for a user named Ted Decker. The top navigation bar includes a search bar and a user profile icon. The main area displays a large photo of Ted Decker, his name, and some basic demographic information: Male, 44 years old, 2/10/1980, Married 21 years, 5/8/2003, and Graduated 1984. Below this is a section for 'Extended Attributes' with icons for a computer, a person, a dollar sign, a wrench, and a briefcase. The 'Profile' tab is selected. To the right, there's a 'Steps' section with icons for Today, 7 yr, 0 / 16, and eRA. Below that is a 'Groups' section with icons for a group of people, a gear, and a plus sign. The 'Documents' section shows a single document icon. The 'Contributions' section shows a list of recent interactions:

- 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 (This note is highlighted with a red box).
- 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 search bar, and a user profile. A central workspace is partially visible. To the right is a detailed configuration panel for an 'Add Note' action:

- Create Note**: The title of the configuration panel.
- Name \***: Create Note (with a checked checkbox for "Action is Completed on Success" and an unchecked checkbox for "Activity is Completed on Success").
- Action Type**: Person Note... (with a tooltip: "'Person Note Add' Overview Adds a note to the selected person.)
- Person**: Person (with a dropdown arrow).
- Note Type**: Personal Note (with a dropdown arrow).
- Caption**: (empty input field).
- Text**: Added to Serving Team (with a dropdown arrow).
- Author**: (empty input field).



# Workflows

## Workflow

### Attributes

Person: Ted Decker

Note: Test Note

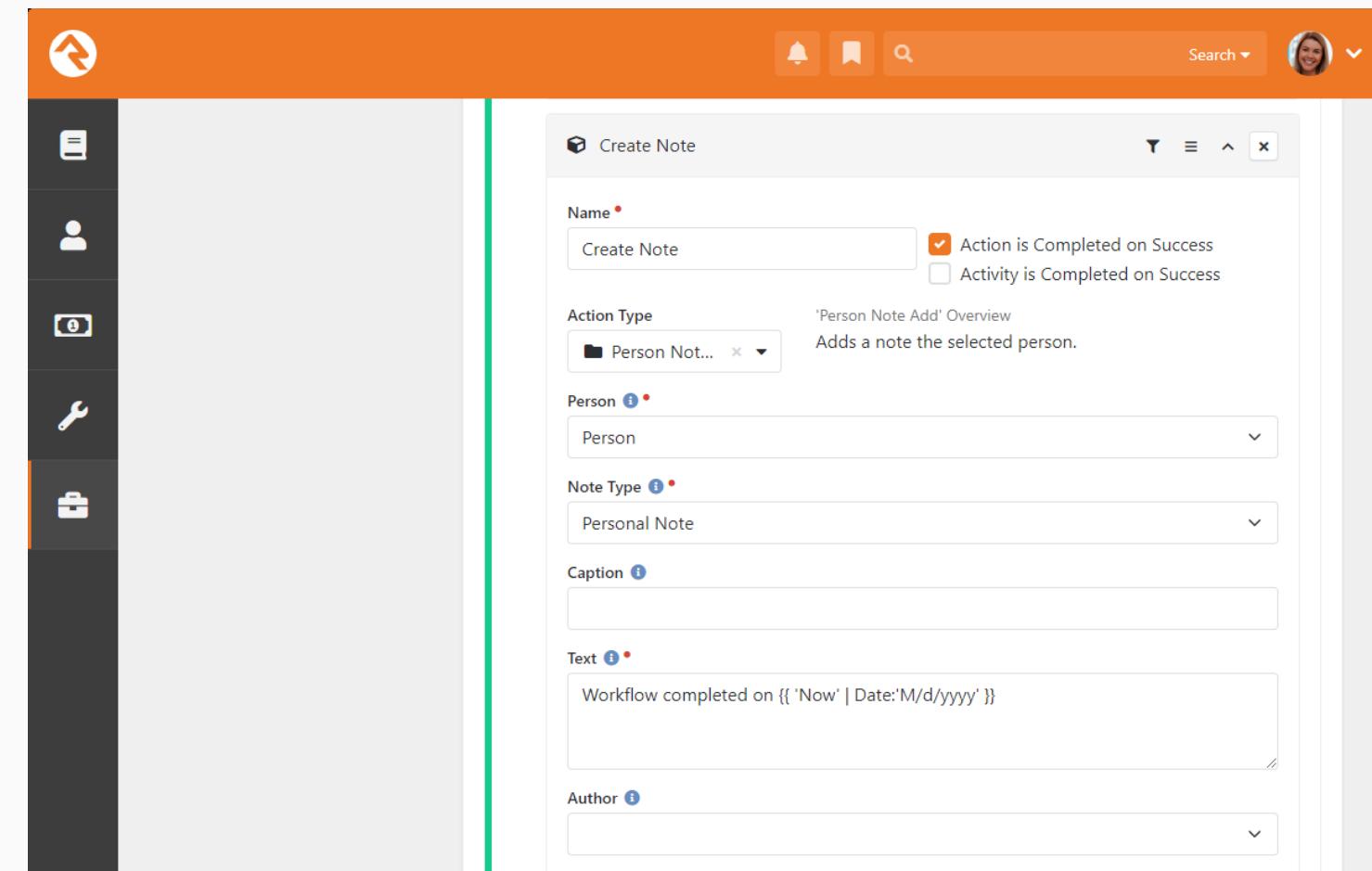
...

### Activity

Action: Form 

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 Folders. The main area has a title bar with a bell, bookmark, search, and user profile. A modal window titled "Create Note" is open. It includes fields for "Name" (Create Note), "Action Type" (Person Note...), "Person" (Person), "Note Type" (Personal Note), "Caption" (empty), "Text" (Workflow completed on {{ 'Now' | Date:'M/d/yyyy' }}), and "Author" (empty). There are also checkboxes for "Action is Completed on Success" (checked) and "Activity is Completed on Success". A tooltip for the "Person Note..." action says: "'Person Note Add' Overview Adds a note to the selected person."



# Workflows

## Workflow

### Attributes

Person: Ted Decker

Note: Test Note

...

### Activity

Action: Form

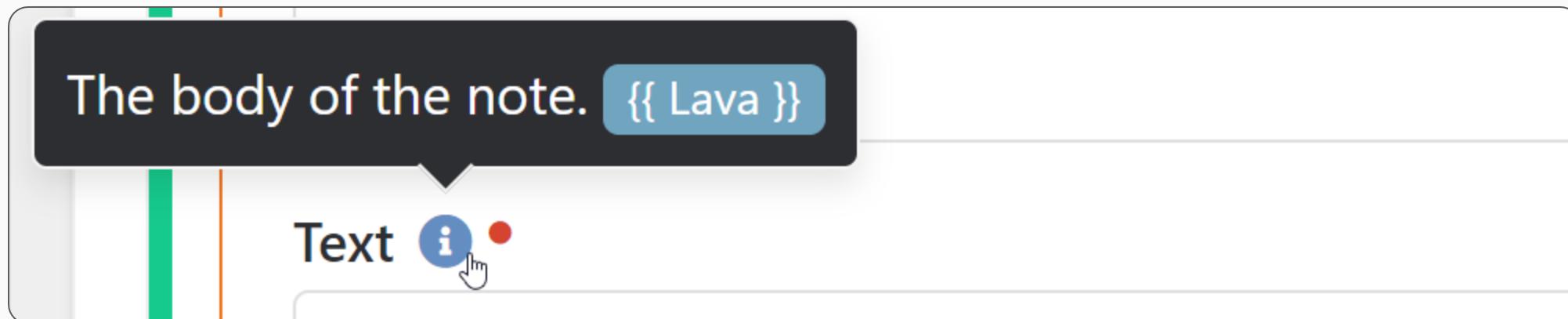
Action: Add Note

Action: Complete Workflow

The screenshot shows the Ravello interface with an orange header. On the left is a sidebar with icons for Home, People, Money, Tools, and Folders. The main area is titled 'Create Note'. It has fields for 'Name' (set to 'Create Note') with checkboxes for 'Action is Completed on Success' (checked) and 'Activity is Completed on Success'. Under 'Action Type', it says 'Person Note...' with a description: "'Person Note Add' Overview Adds a note to the selected person.''. There's a 'Person' dropdown set to 'Person', a 'Note Type' dropdown set to 'Personal Note', and a 'Caption' field. A text area contains the Lava code: 'The body of the note. {{ Lava }}'. Below it, a 'Text' field contains the placeholder 'Workflow completed on {{ 'Now' | Date:'M/d/yyyy' }}'. An 'Author' field is at the bottom.



# 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 UI interface for configuring a workflow. On the left, there's a sidebar with icons for Person, Note, Spouse, and a wrench. The main area has a header with a search bar and user profile. The central part is titled "Form Fields" and contains a table for defining fields like Person, Note, and Spouse with checkboxes for visibility, editability, and required status. Below this is a "Form Footer" section with a command button labeled "Submit".

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

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:

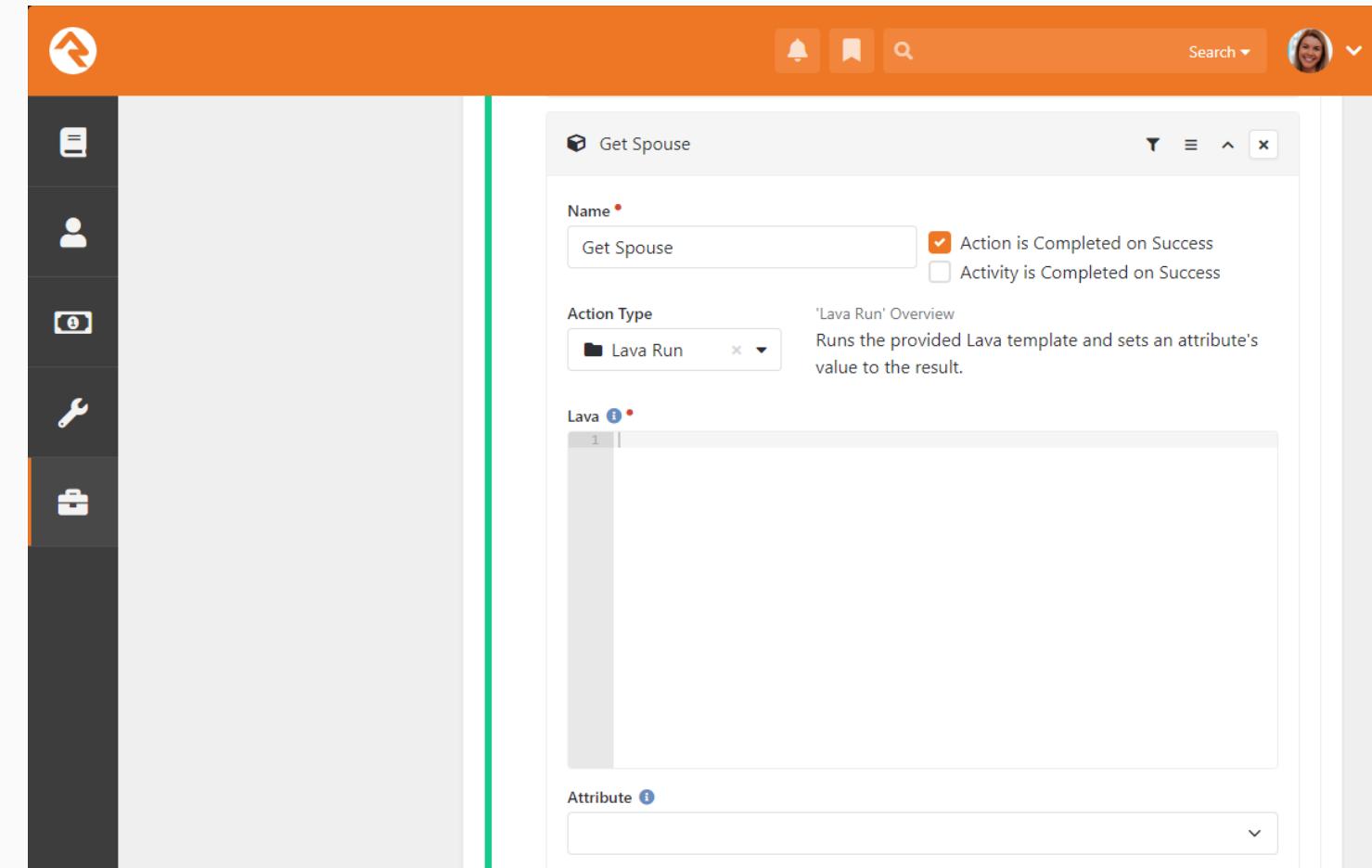
### Activity

Action: Form 

Action: Get Spouse 

Action: Add Note

Action: Complete Workflow



The screenshot shows the Lava Run configuration interface. At the top, there's a navigation bar with icons for notifications, bookmarks, search, and user profile. The main area is titled 'Get Spouse'. It includes fields for 'Name' (set to 'Get Spouse') and checkboxes for 'Action is Completed on Success' (checked) and 'Activity is Completed on Success'. Below this, the 'Action Type' is set to 'Lava Run', with a description: "'Lava Run' Overview: Runs the provided Lava template and sets an attribute's value to the result.''. A 'Lava' section shows a single step labeled '1'. At the bottom, there's an 'Attribute' field with a dropdown menu.



# 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

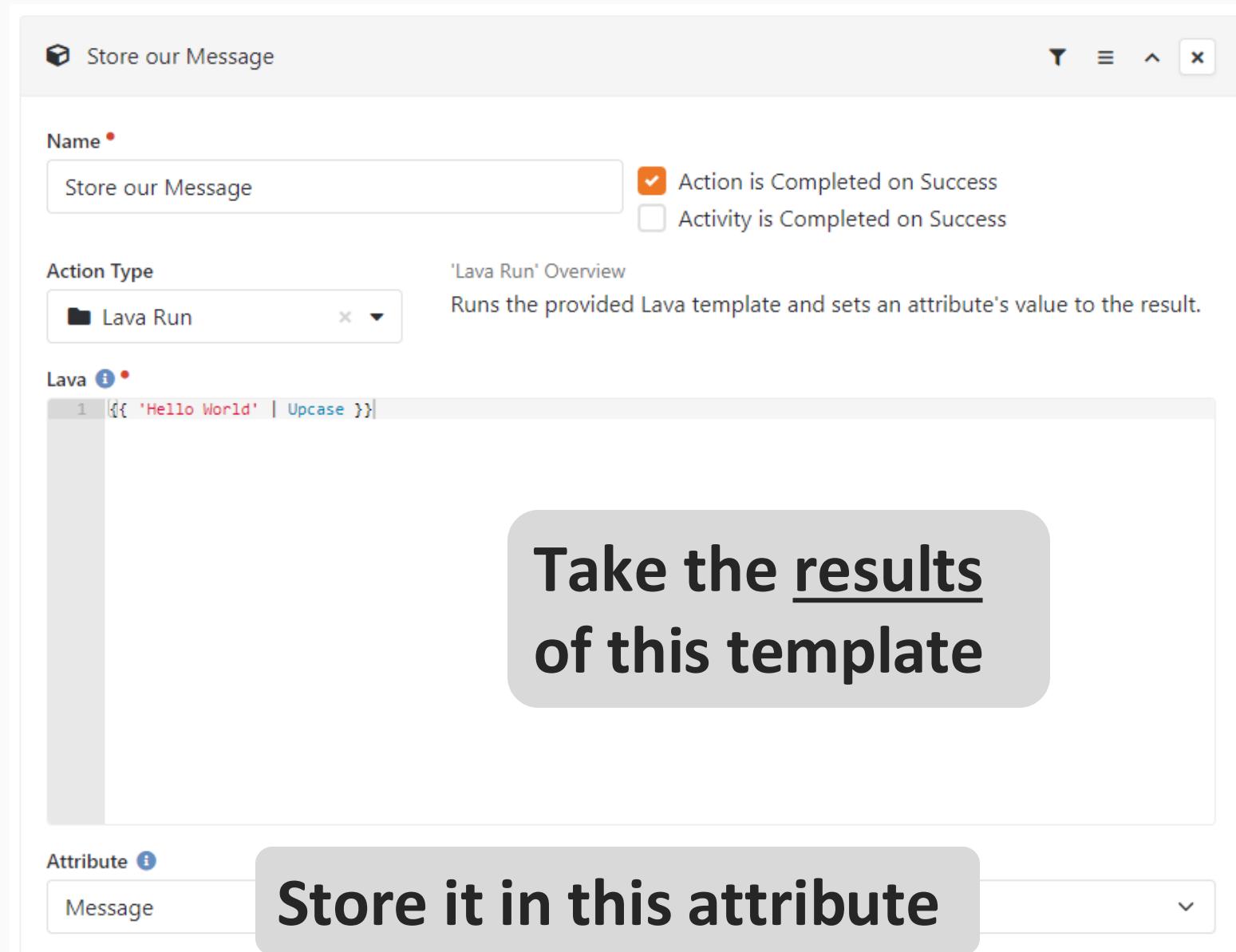
'Lava Run' Overview  
Runs the provided Lava template and sets an attribute's value to the result.

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

Take the results of this template

Attribute ⓘ  
Message

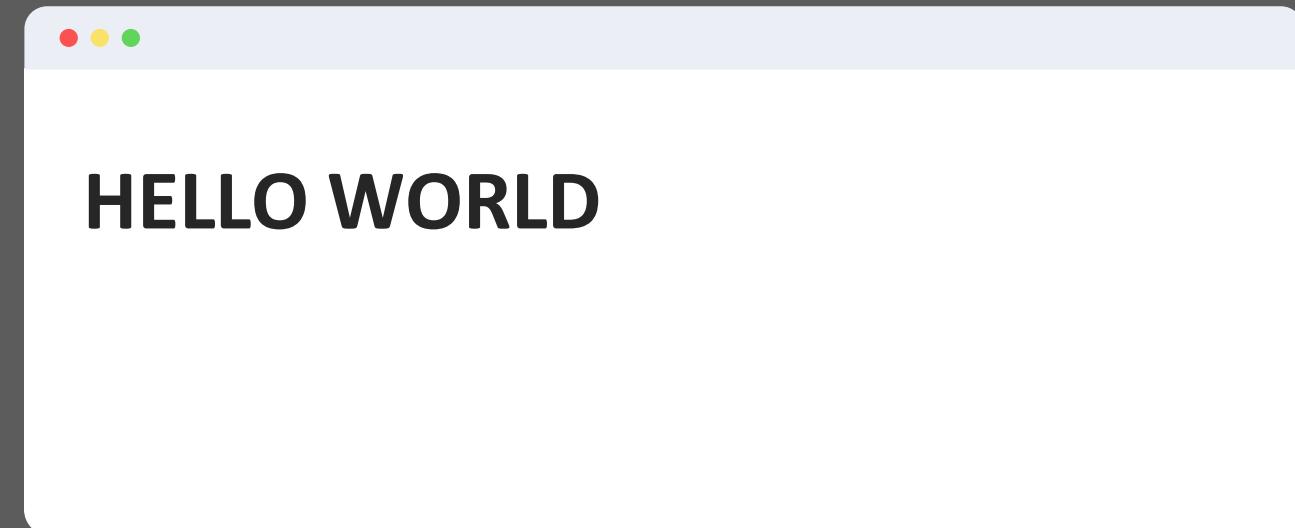
Store it in this attribute





# Workflow Attributes

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





# Workflows

## Workflow

### Attributes

Person: Ted Decker

Note: Test Note

Spouse:

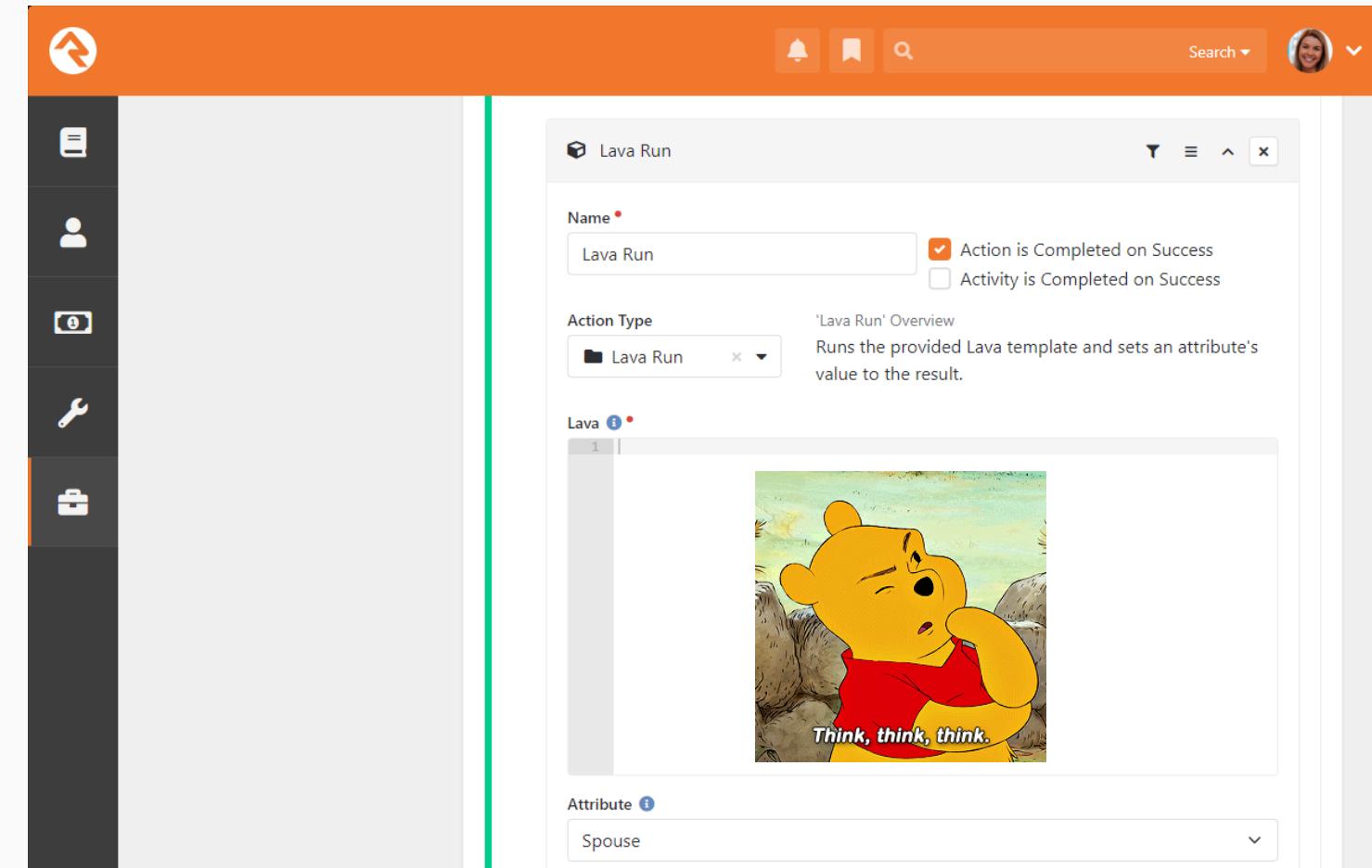
### Activity

Action: Form 

Action: Get Spouse 

Action: Add Note

Action: Complete Workflow



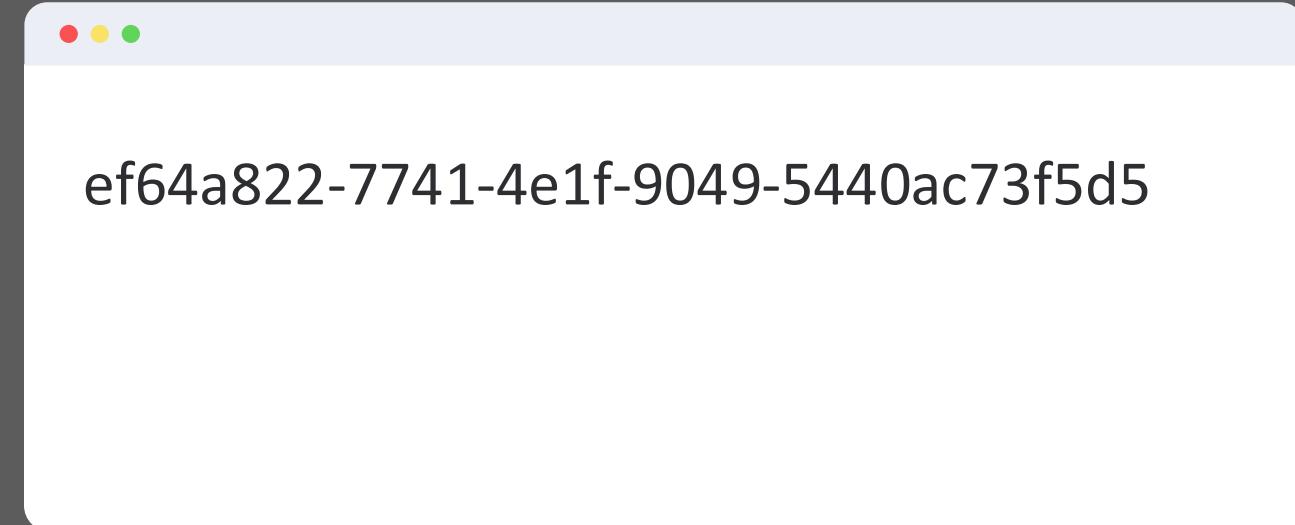
The screenshot shows a workflow configuration interface with an orange header. The left sidebar has icons for document, person, money, tools, and briefcase. The main area is titled 'Lava Run'. It includes fields for 'Name' (Lava Run), 'Action is Completed on Success' (checked), and 'Activity is Completed on Success' (unchecked). The 'Action Type' is set to 'Lava Run'. A description states: "'Lava Run' Overview: Runs the provided Lava template and sets an attribute's value to the result." Below this is a 'Lava' section with a placeholder '1 |' and an image of Winnie the Pooh thinking with the text 'Think, think, think.' At the bottom, there is an 'Attribute' field set to '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' }}
```

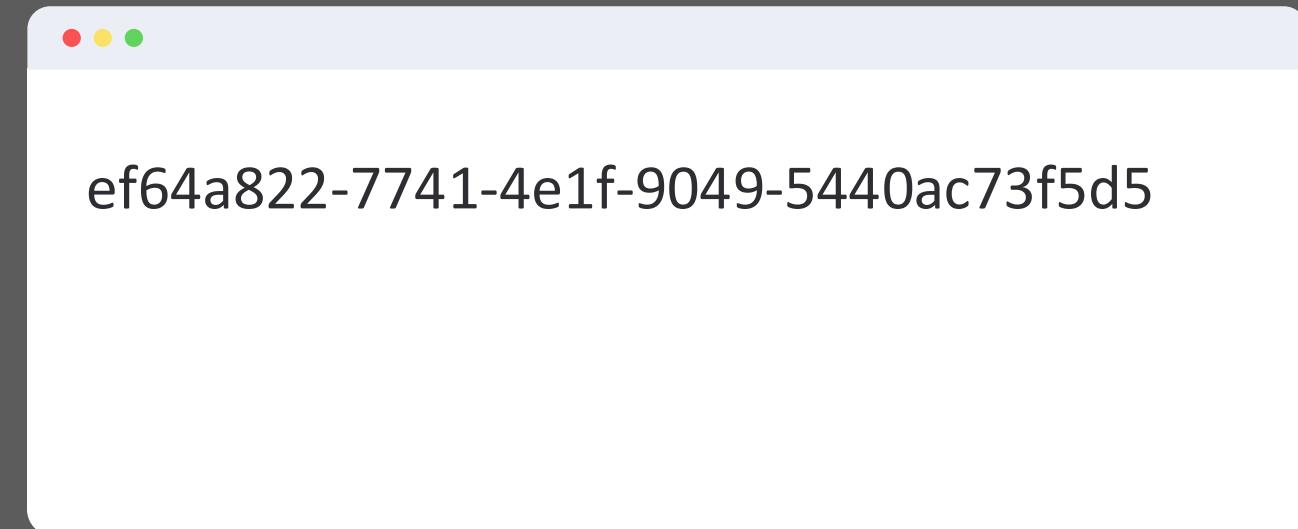
```
{  
  "Id": 5,  
  "NickName": "Ted",  
  "LastName": "Decker",  
  [...]  
}
```

```
{  
  "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:

- 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 interface. 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 Case, with the Case icon currently selected. The main content area displays a list of 'Workflow Type' options: Check-in, Data Integrity, Requests, Safety & Security, and Samples. The 'Samples' option is expanded, showing sub-options: 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 main content area has a large orange header with the title 'Workflows and Lava'. Below the header, there's a section titled 'Workflows & Lava' with a sub-section about attribute values and field types.

ROCK COMMUNITY / LAVA / WORKFLOWS AND LAVA

Log In

Community

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

Learn

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

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: 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 about her mother), 'Test Note' (from Alisha Admin), and another note from Alisha Marble about starting a new ministry. At the bottom of the profile section is a dropdown menu with options: 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 a person named Ted Decker, with a large photo of him smiling. Below the photo, his name is listed as 'Ted Decker' with the title 'Theodore'. Underneath his name are buttons for 'Member' and 'Follow'. Further down, there are sections for 'Male', '44 years old', '2/10/1980', 'Married 21 years', '5/8/2003', and 'Graduated 1994'. To the right of these details is a context menu with several options: 'Download vCard', 'Add Note to Spouses' (which is highlighted with a red arrow), 'Background Check (Checkr)', 'Person Data Error', 'Photo Request', and 'Request Assessment'. Above the context menu, there are tabs for 'Profile', 'Extended Attributes', 'Steps', 'Groups', 'Documents', 'Contributions', and 'More'. The top right corner features a search bar, a user profile picture, and a notification bell. The right side of the screen shows a timeline of recent activity, including notes from 'Alisha Marble' and 'Alisha Admin'.



# 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

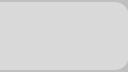


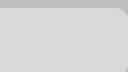
# Workflow Entity

## Workflow

### Attributes

Person: 

Note: 

Spouse: 

### Activity

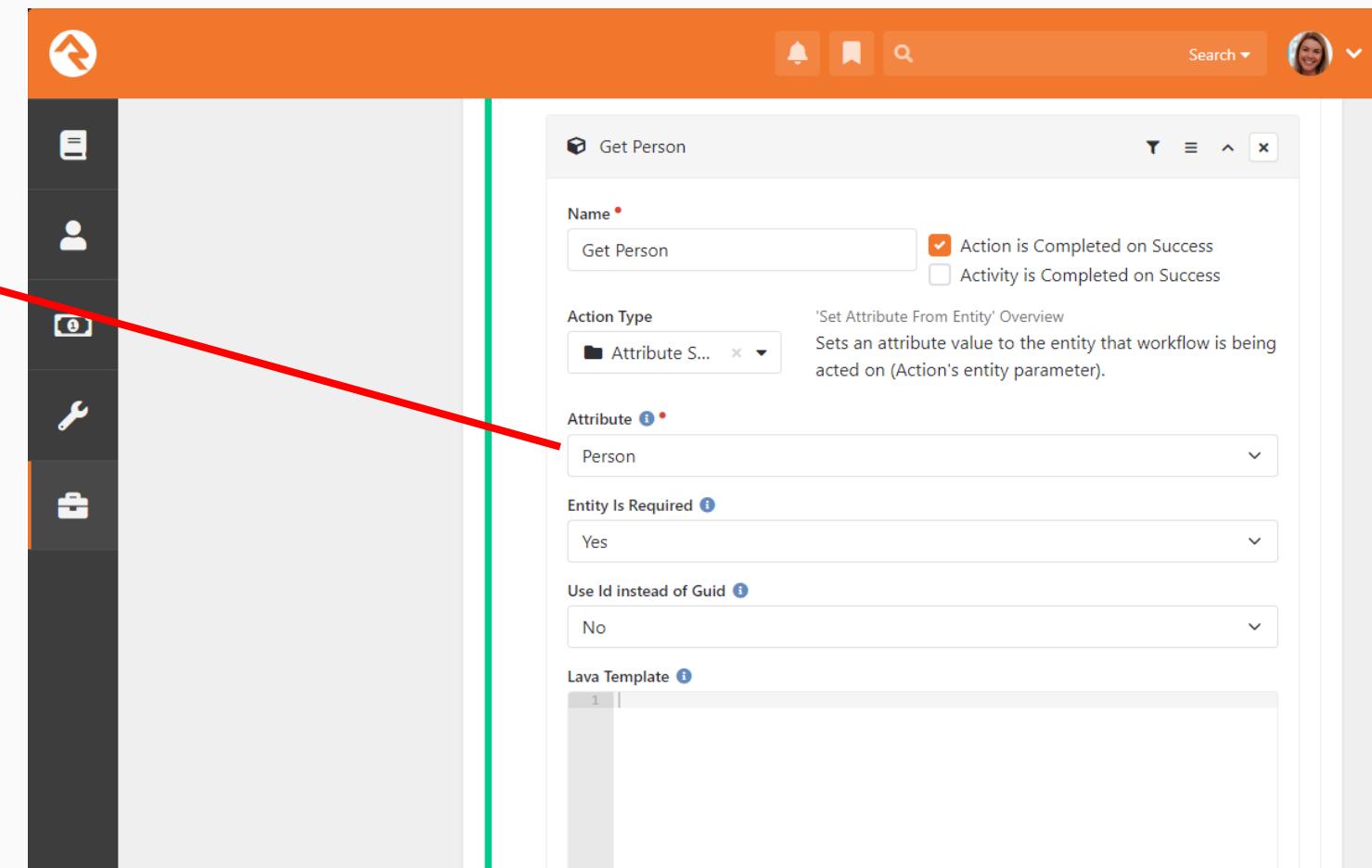
Action: Get Person 

Action: Get Spouse

Action: Form

Action: Add Note

Action: Add Spouse Note



The screenshot shows the RPA Platform's configuration interface for a 'Get Person' action. A red arrow points from the 'Person' attribute placeholder in the Workflow Attributes section to the 'Attribute' field in the 'Get Person' 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:** `1 |`



# 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 the Ravello interface for configuring a workflow entity. On the left, there's a sidebar with icons for Home, People, Money, Tools, and Projects. The main area has a title bar with a bell icon, a bookmark icon, a search bar, and a user profile. Below the title bar, there's a card for 'Get Spouse' with the following details:

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

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

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



# 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 configuration interface for a Workflow Entity. On the left is a sidebar with icons for document, person, money, tools, and a briefcase. The main area has an orange header with a search bar and user profile. The central part is a form builder with sections for Form Header, Form Fields, and Form Footer. The Form Fields section includes columns for Field, Visible, Editable, Required, Hide Label, Pre-HTML, Post-HTML, and Logic. The fields listed are Person, Spouse, and Note, each with specific settings like visibility and editability. At the bottom, there are options for Command Label (Submit), Button Type (Primary), Activate Activity, and Response Text (Your information has bee).

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



# 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

Text i \*

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

Author i

Alert i

No



# 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 Note...

'Person Note Add' Overview

Adds a note to the selected person.

#### Person

Spouse

#### Note Type

Personal Note

#### Caption

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

#### Text

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 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". There are three buttons: Member, Follow, Email, Actions, and Edit. To the right of the profile, there's a section titled "Alert: Personal Note" showing a recent note from Alisha Marble. The note content is: "Called Ted and heard that his mother is in the hospital and could use prayer." Below this, another note from Alisha Admin is shown: "Test Note". At the bottom, another note from Alisha Marble is shown: "Talked to Ted today about starting a new Young Adults ministry". On the left side of the main content area, there's a sidebar with icons for document, person, money, wrench, and briefcase.



# 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. The top navigation bar includes a search bar, a user profile, and various menu items like Profile, Extended Attributes, Steps, Groups, Documents, Contributions, and More. On the left, a sidebar lists icons for document, person, money, tools, and briefcase. The main content area displays a large photo of Cindy Decker, her name, and her spouse's name, Cynthia. Below this, there are sections for her gender (Female), age (43 years old, born 3/10/1981), and marriage status (Married 21 years, since 5/8/2003). To the right, there are sections for writing a note, recent activity (a personal note from 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 three 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, a vertical sidebar contains five icons: a document, a person, a wallet, a wrench, and a briefcase.



# Workflows

Could I be more specific than “spouse profile”?

You've got this! 🎉

The screenshot shows a software interface for creating workflows. On the left is a vertical toolbar with icons for notes, people, money, tools, and a briefcase. The main area has a light gray background with a dark sidebar on the left. A central panel 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 software interface for managing workflows. On the left, there's a vertical toolbar with icons for document, person, money, tools, and a briefcase. The main area is titled "Create Spouse Note".  
The "Run If" condition is set to "Spouse" and "Is Not Bla".  
The "Name" field is set to "Create Spouse Note". There are two checkboxes: "Action is Completed on Success" (checked) and "Activity is Completed on Success" (unchecked).  
The "Action Type" is set to "Person Note Add" (Overview: Adds a note to the selected person).  
The "Person" field is set to "Spouse".  
The "Note Type" is set to "Personal Note".  
The "Caption" field is empty.  
The "Text" field contains the expression: `{{ Workflow | Attribute:'Note' }} (entered from {{ Workflow | Attribute:'Person','NickName' | Possessive }} profile)`.



# 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 recent 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 Projects. 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, and Search, along with a user profile picture and a search bar.



# 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 



### Important:

The entity isn't available forever.

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



# 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 a single transaction for "Decker, Ted" on "9/15/2024 12:00:00 AM" with an amount of "\$100.00" and a currency type of "Check". The transaction is linked to "Batch Id: 282" and "Accounts: General Fund: \$100.00". At the bottom, there are buttons for "50", "500", and "5,000" transactions, and a link to "1 Transaction Detail". In the top right of the grid header, there is a gear icon, which is circled in red. The bottom right corner shows a "Total Results" section with "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*)

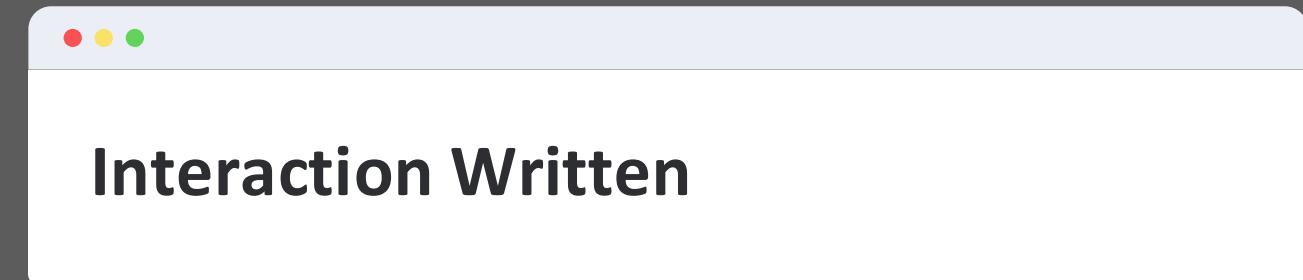


# Lava Run Commands

```
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

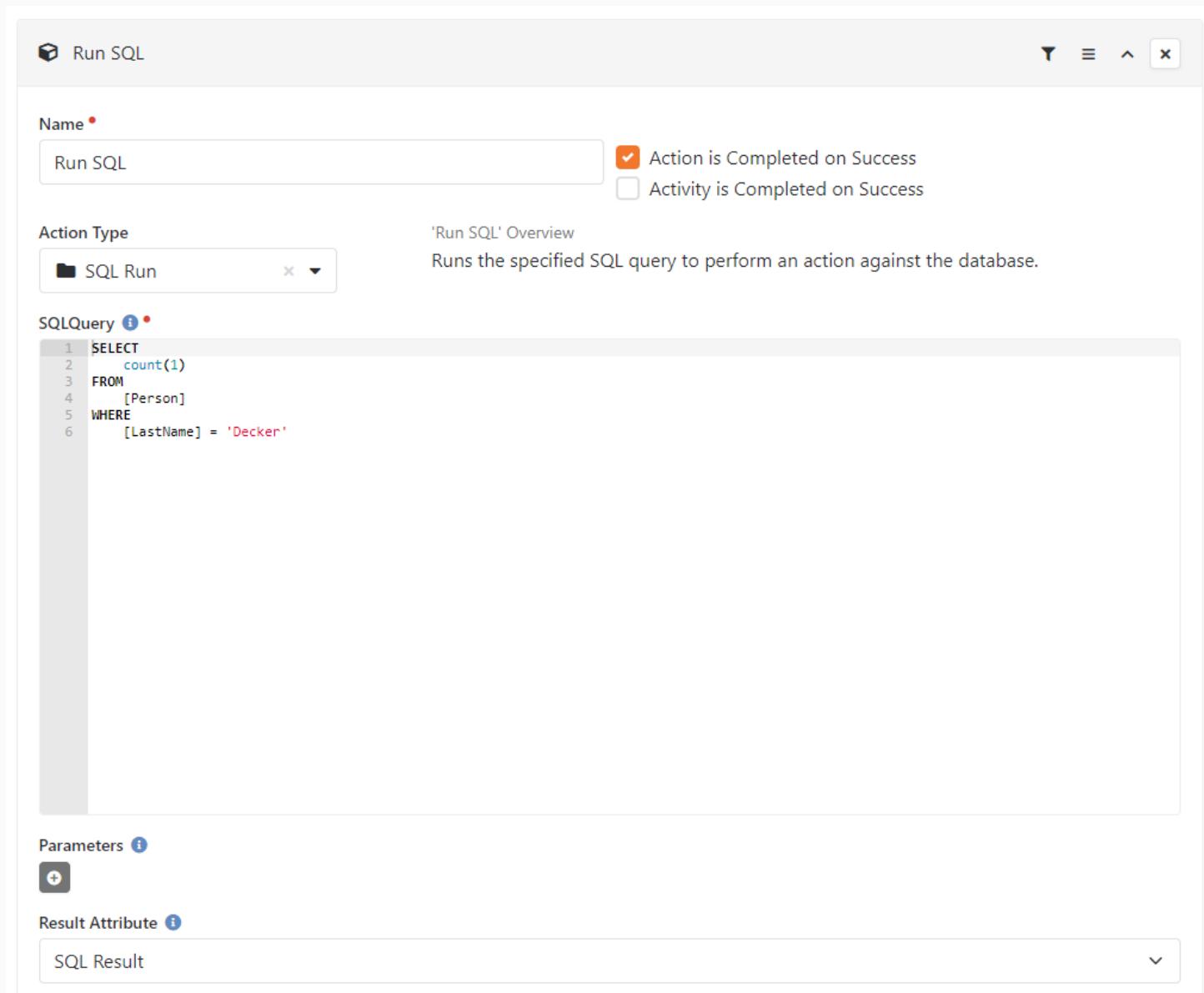
Action Type SQL Run 'Run SQL' Overview Runs the specified SQL query to perform an action against the database.

SQLQuery ⓘ •

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

Parameters +

Result Attribute ⓘ SQL Result



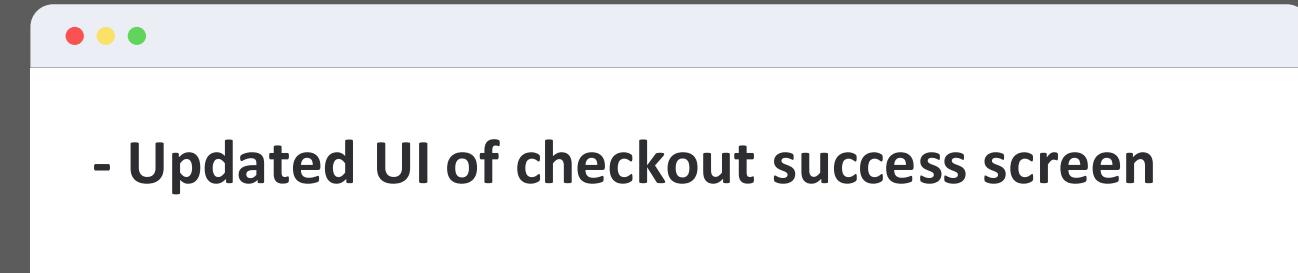


# Lava Run Commands

```
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 Type: Form

Action is Completed on Success  
 Activity is Completed on Success



# 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

Abbreviated Name  Public i

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

Categories  Field Type Single-Select

Key  Values i   
Full-time, Part-time

Required  Require a value Show in Grid i  Yes

Show on Bulk i  Yes Control Type i

Columns i

Default Value  
 None  Full-time  Part-time



# Workflow Action Filters

Field Type  
Single-Select

Values ⓘ  
Full-time, Part-time

Get Full-time Details

Run If ⓘ

Type Equal To Text Value Attribute Value

Full-time or

## Format 1: Commas

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

“Full-time” or “Part-time”

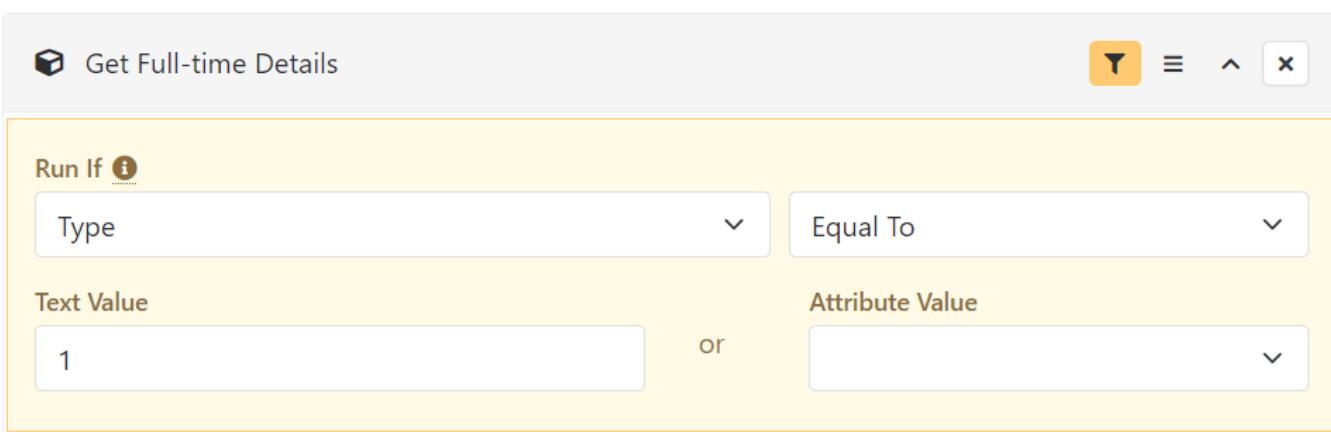


# Workflow Action Filters

Field Type  
Single-Select

Values i

1^Full-time,2^Part-time



Get Full-time Details

## Format 2: Value^Text

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

“1” or “2”

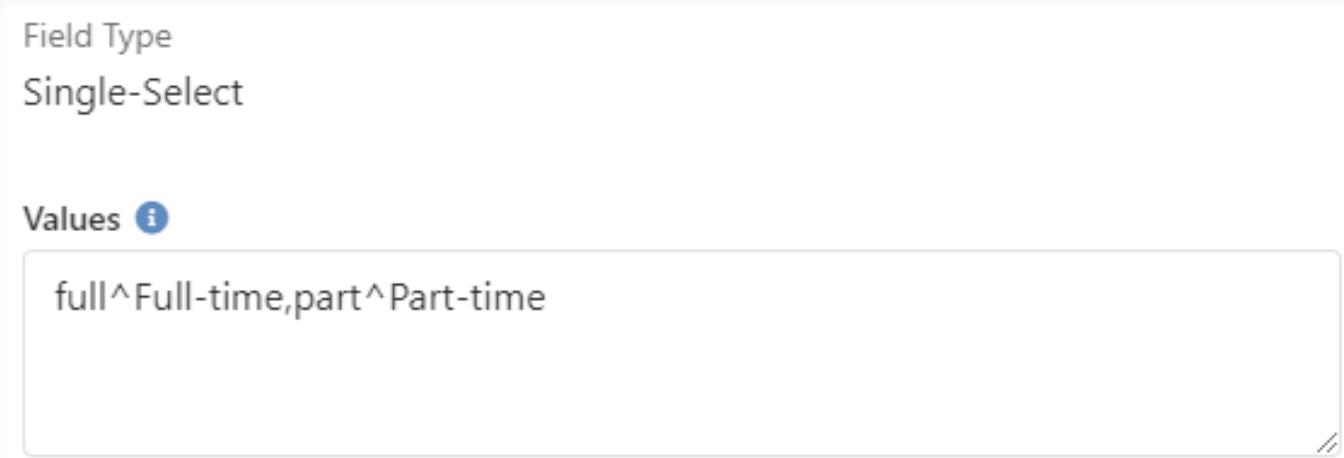


# Workflow Action Filters

Field Type  
Single-Select

Values i

full^Full-time,part^Part-time



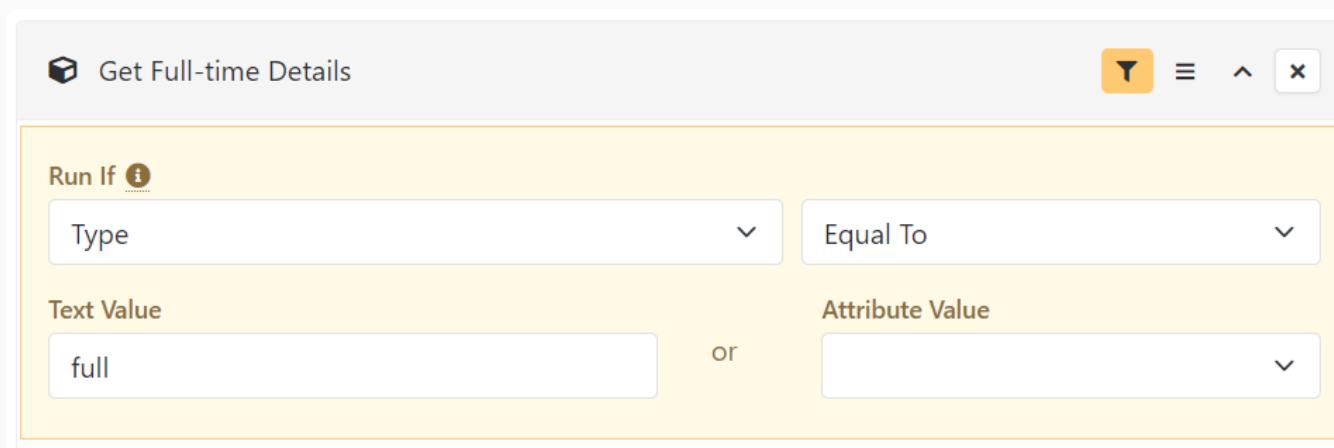
Get Full-time Details

Run If i

Type Equal To

Text Value Attribute Value

full 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). There are two input fields: "Text Value" containing "778" and "Attribute Value" (which is currently empty). A small "or" button is located between the two input fields.

## 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

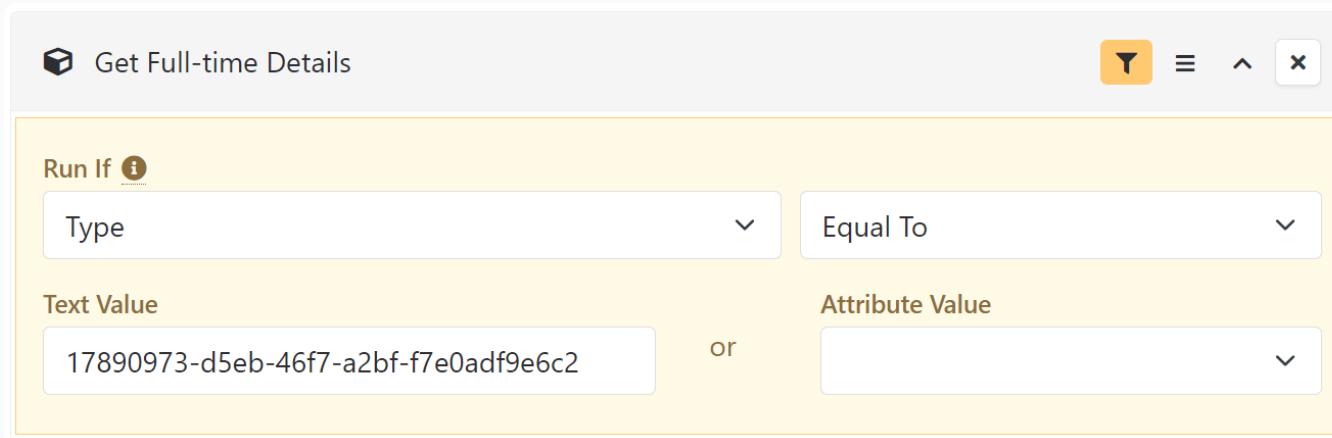
```
SELECT
    [Guid] AS [Value]
    , [Value] AS [Text]
FROM [DefinedValue]
WHERE [DefinedTypeId] = 82
```

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

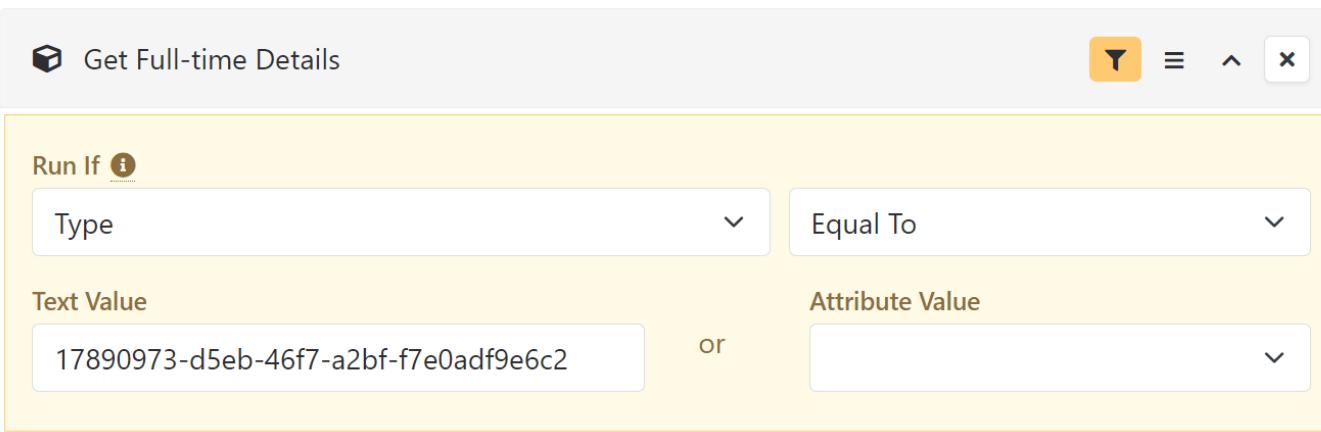
```
SELECT
    [Guid] AS [Value]
    , [Value] AS [Text]
FROM [DefinedValue]
WHERE [DefinedTypeId] = 82
```

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”.



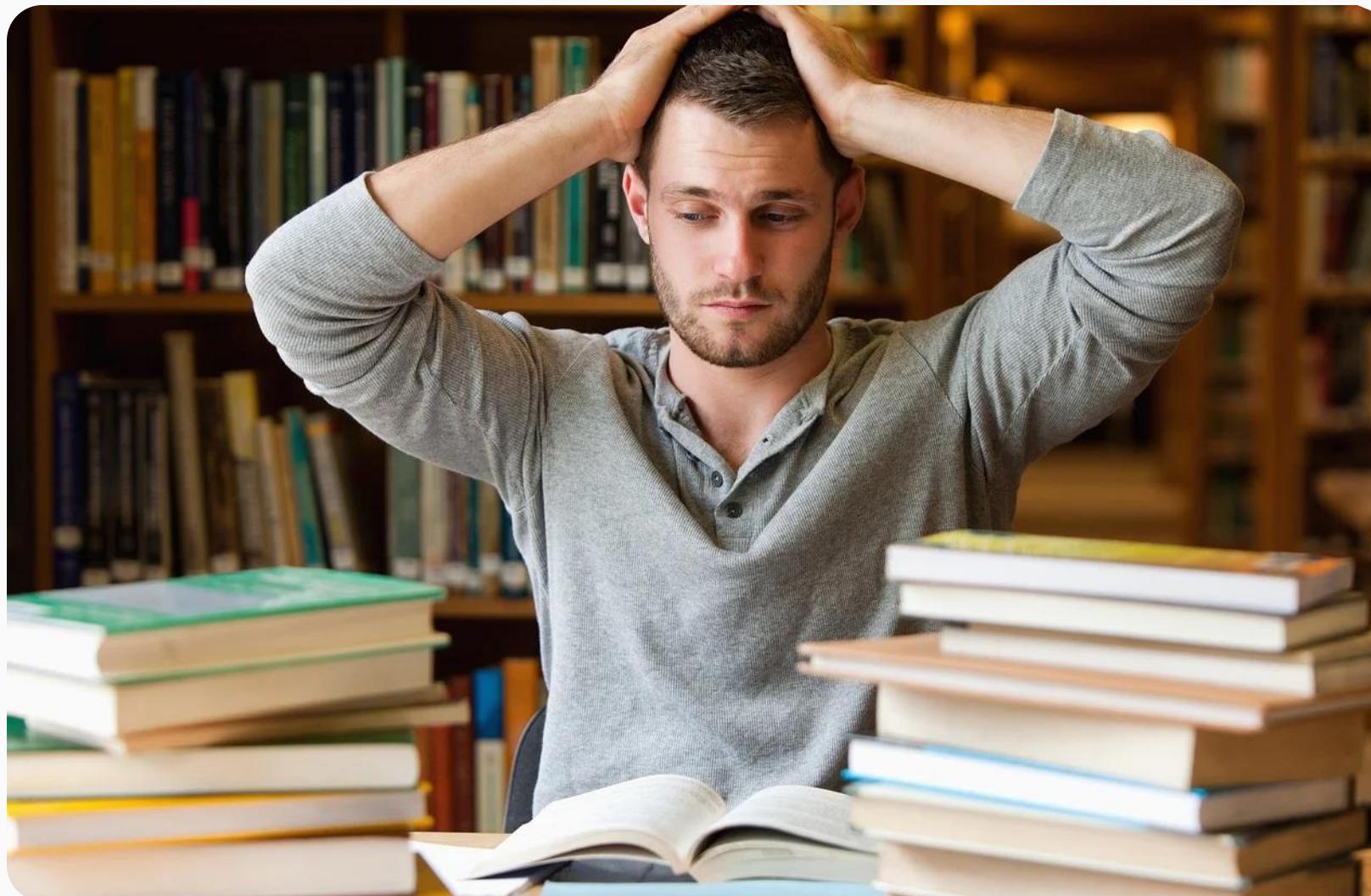
### Tip:

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



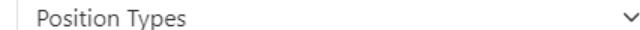
Key \*

FullTimeValue

Field Type



Defined Type i



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

Get Full-time Details

Run If ?

Type Equal To

Text Value Attribute Value

or Full Time Value

This screenshot shows a workflow action configuration for "Get Full-time Details". The "Run If" condition is set to "Type Equal To". There are two options: "Text Value" and "Attribute Value". The "Attribute Value" option is highlighted with a red box, showing the value "Full Time Value".

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 ▼ □ ^ X

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  {% assign baptismDate = Workflow | Attribute:'Person','Object' | Attribute:'BaptismDate' %}
2  {% assign connectionStatus = Workflow | Attribute:'Person','ConnectionStatusValue.Value' %}
3
4  {% if baptismDate != '' and connectionStatus == 'Member' %}
5      True
6  {% else %}
7      False
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 x ▾

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

Lava ⓘ •

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

Oh