

Creating a Workflow Trigger to Pull Data Values by Reference

Last Modified on 06/13/2024 11:13 am EDT

Overview

Users can add context to an Object using the Pull Data Values option on the **Type** dropdown menu on the *Edit Trigger* pop-up within a Workflow Trigger, using a relationship or reference.

User Account Requirements

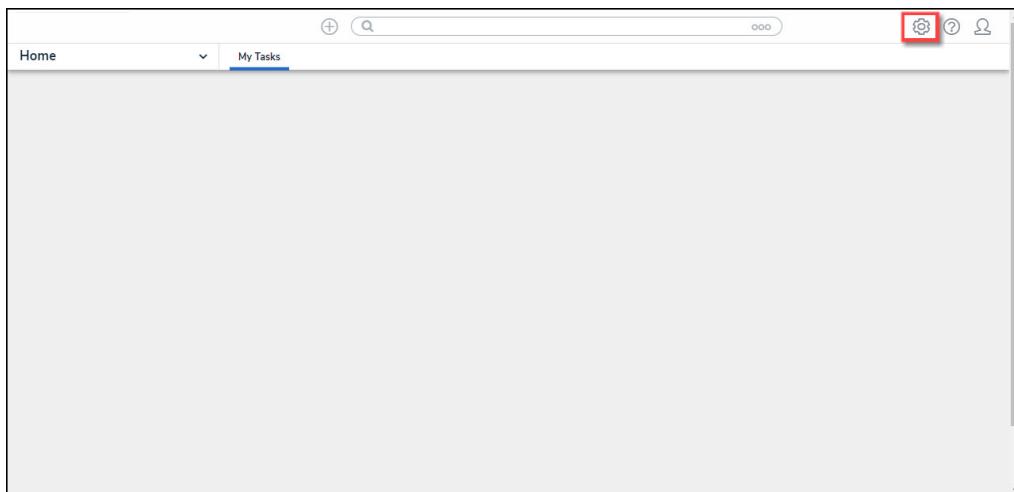
The user account you use to log into Resolver must have Administrator permission to create the Workflow Trigger.

Related Information/Setup

Please see the [Transition](#) category for more information on Actions on Workflow Trigger Transition.

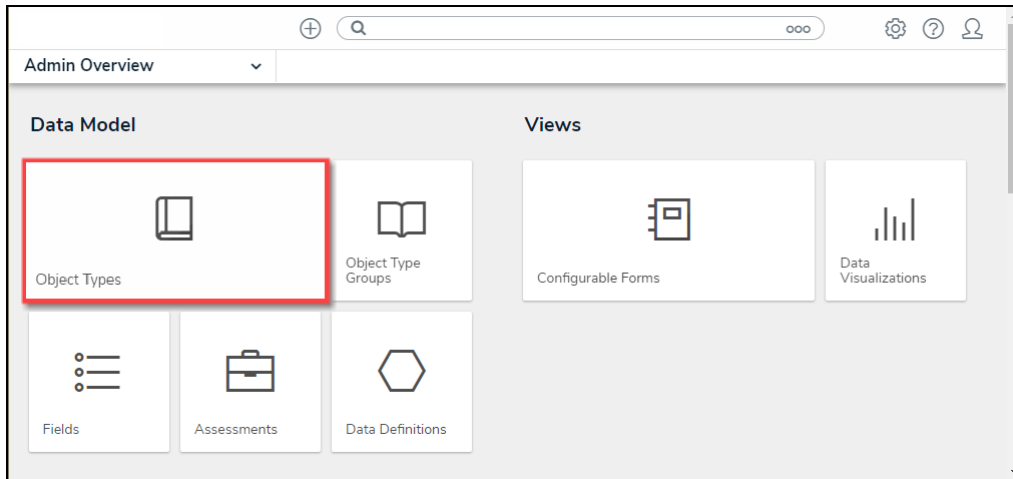
Navigation

1. From the **Home** screen, click on the **Administration** icon.



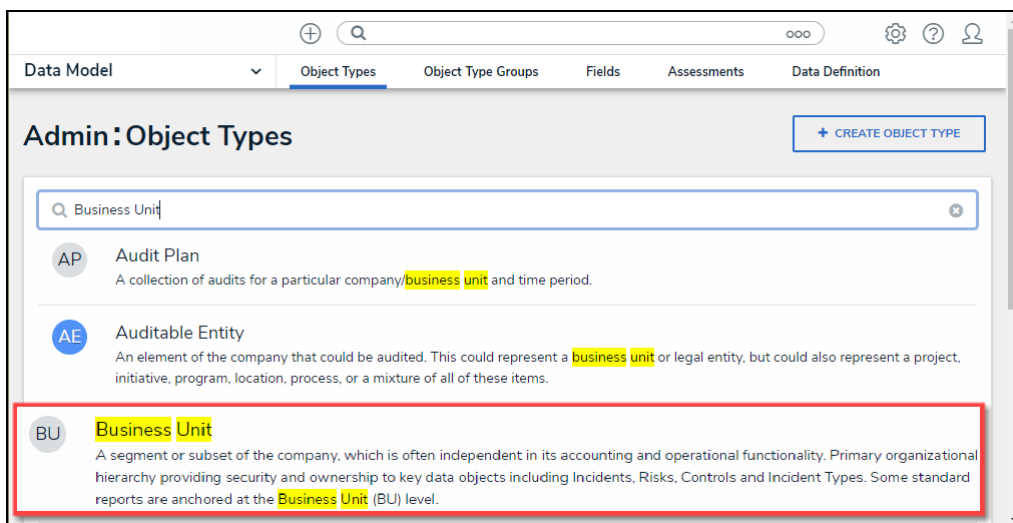
Administration Icon

2. From the **Admin Overview** screen, click on the **Object Types** tile under the **Data Model** section.



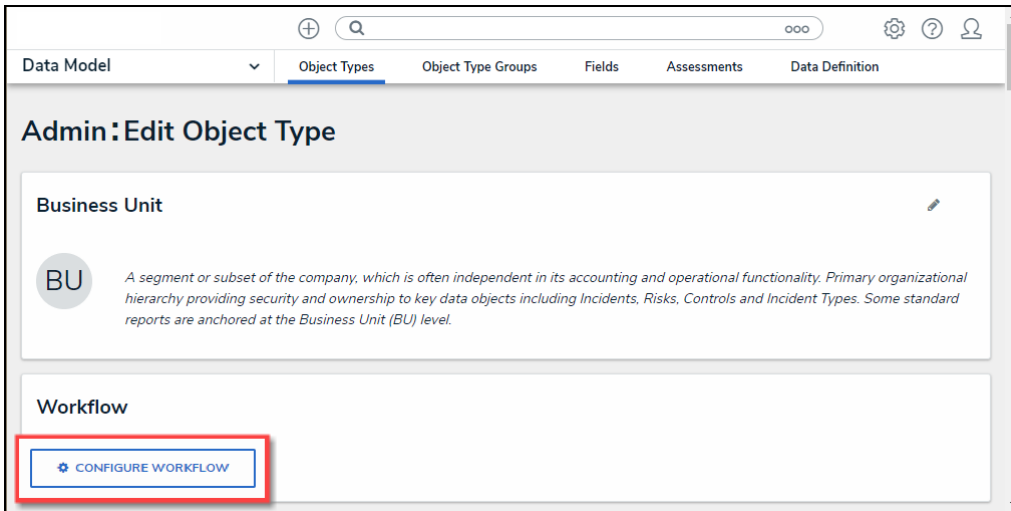
Dashboard Data Sets Tile

3. From the **Admin Object Types** screen, enter an Object Type Name in the **Search** field to narrow the search results and click on an Object Type.



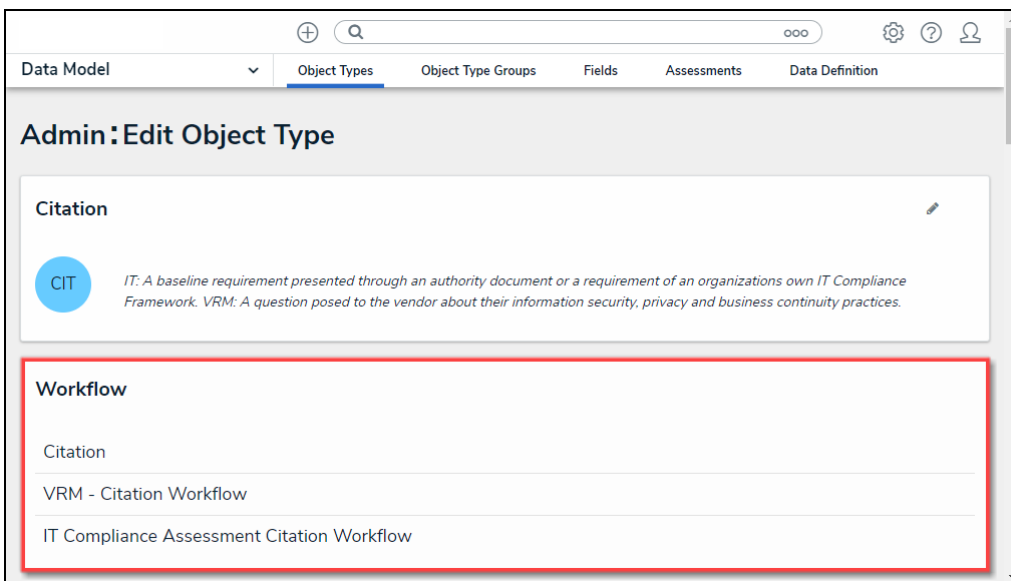
Object Type

4. From the **Edit Object** screen, click the **Configure Workflow** button on the **Workflow** section.



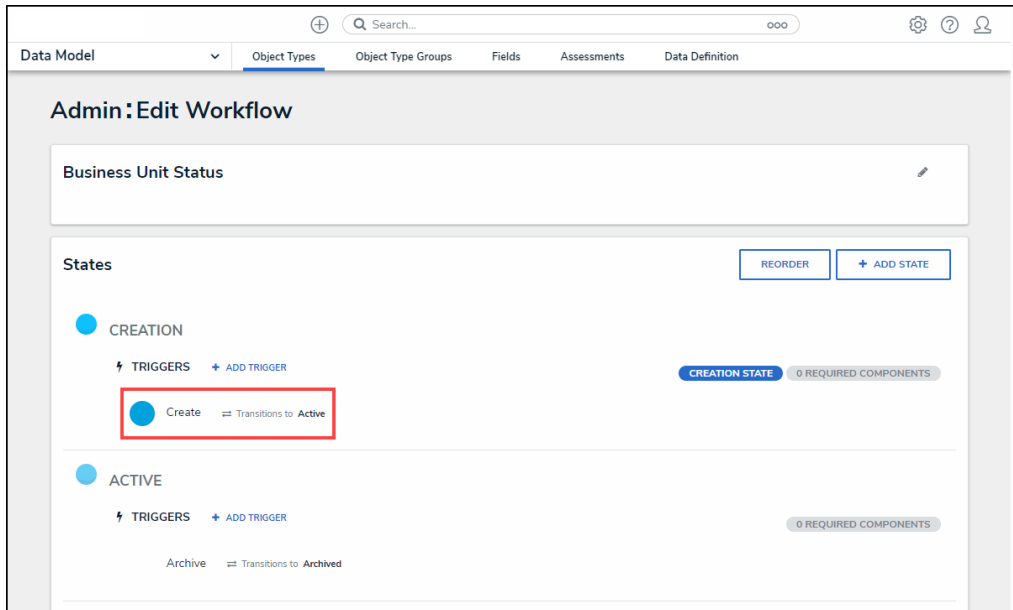
Configure Workflow Button

5. If multiple Workflows are set up for the Object Type, click the desired Workflow from the list.



Multiple Workflows

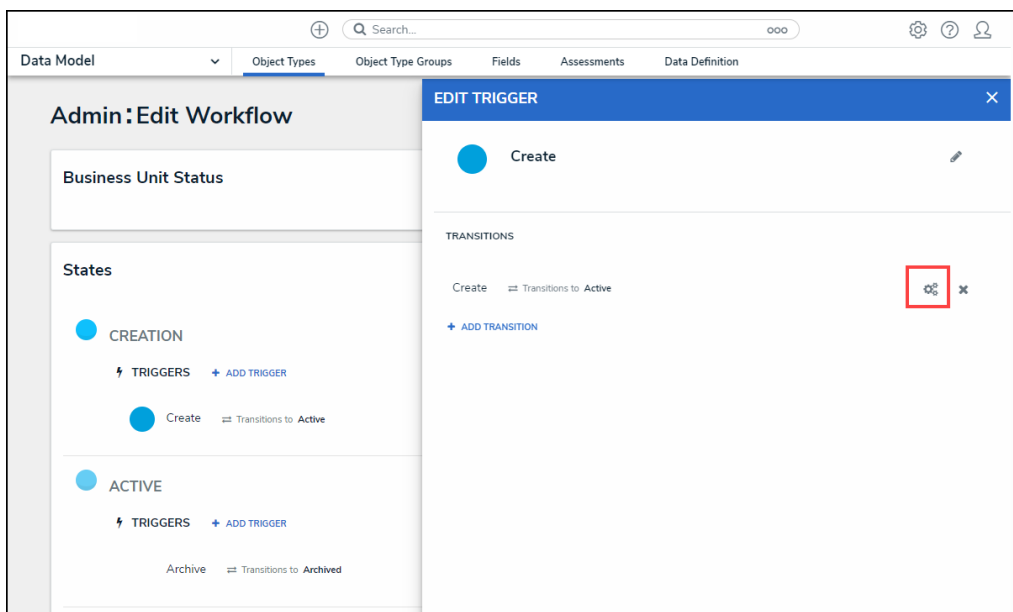
6. From the **Edit Workflow** screen, click on a **Trigger** link under a **State**.



+Add Trigger Link

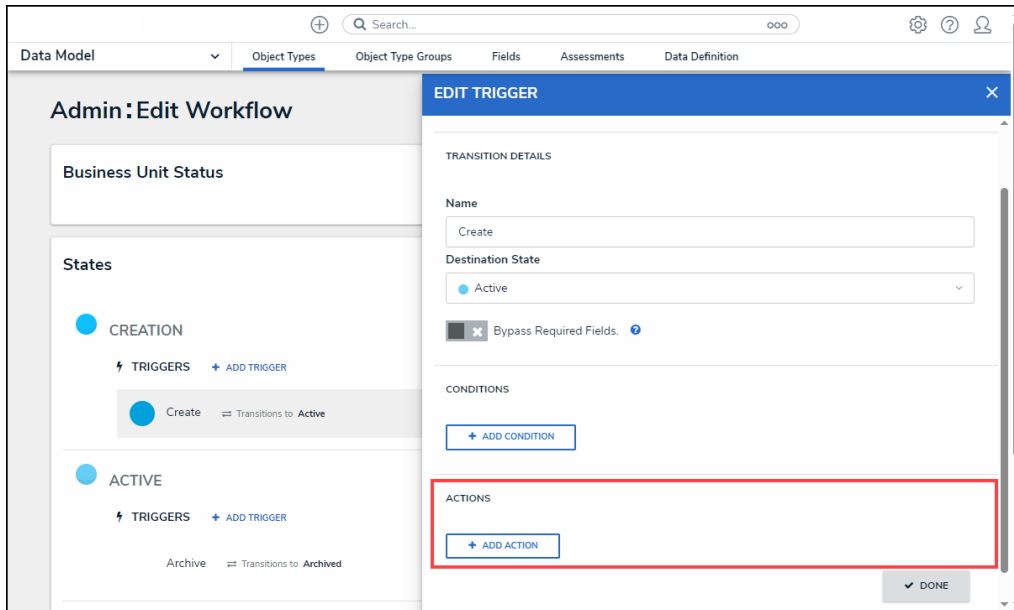
Creating a Workflow Trigger to Pull Data Values by Reference

1. From the **Edit Trigger** pop-up, click the **Edit Transition** icon.



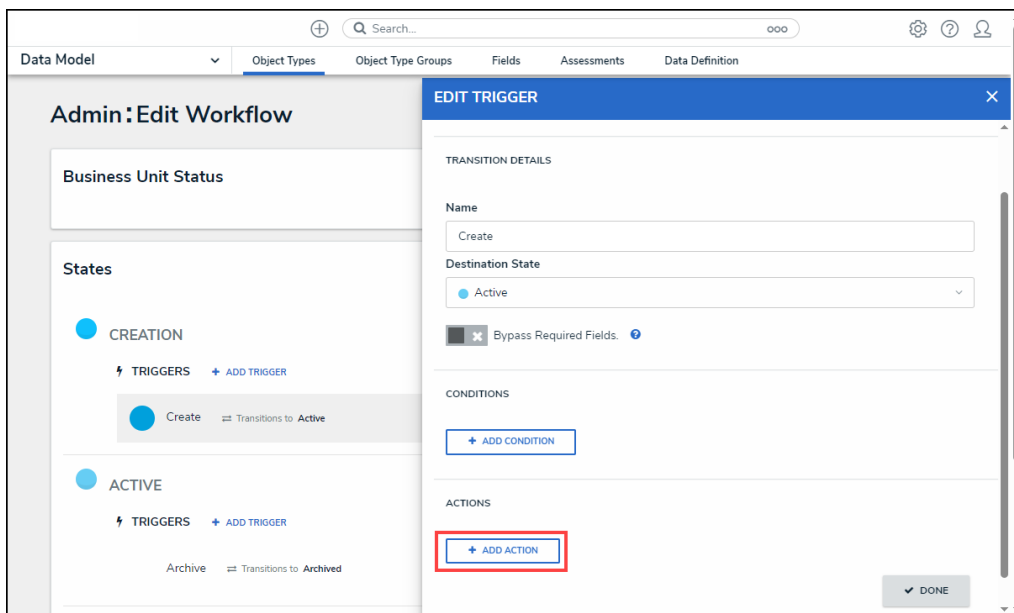
Edit Transition Icon

2. Scroll to the **Action** section.



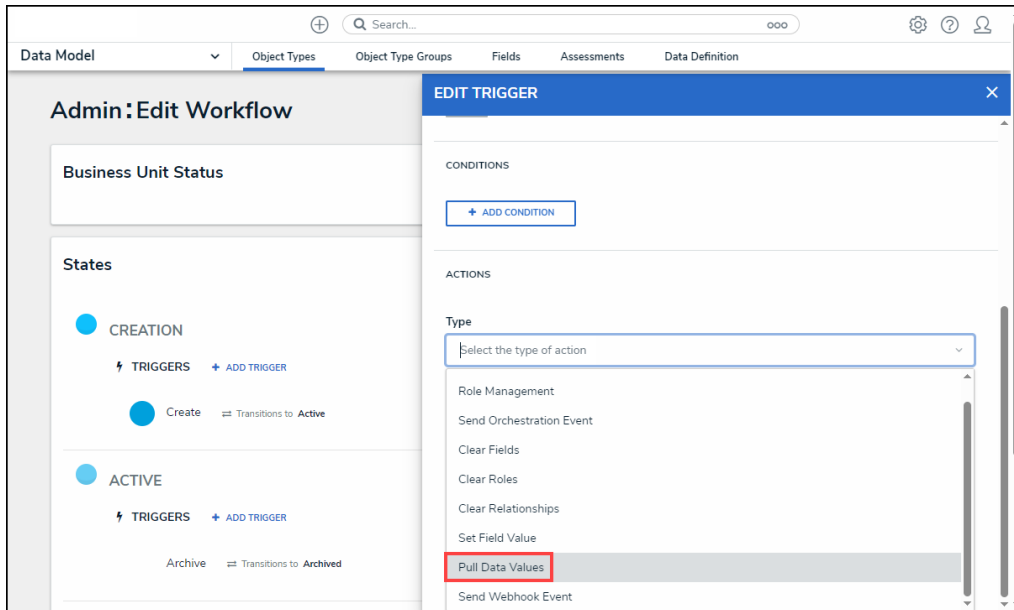
Action Section

3. Click the **+ Add Action** button.



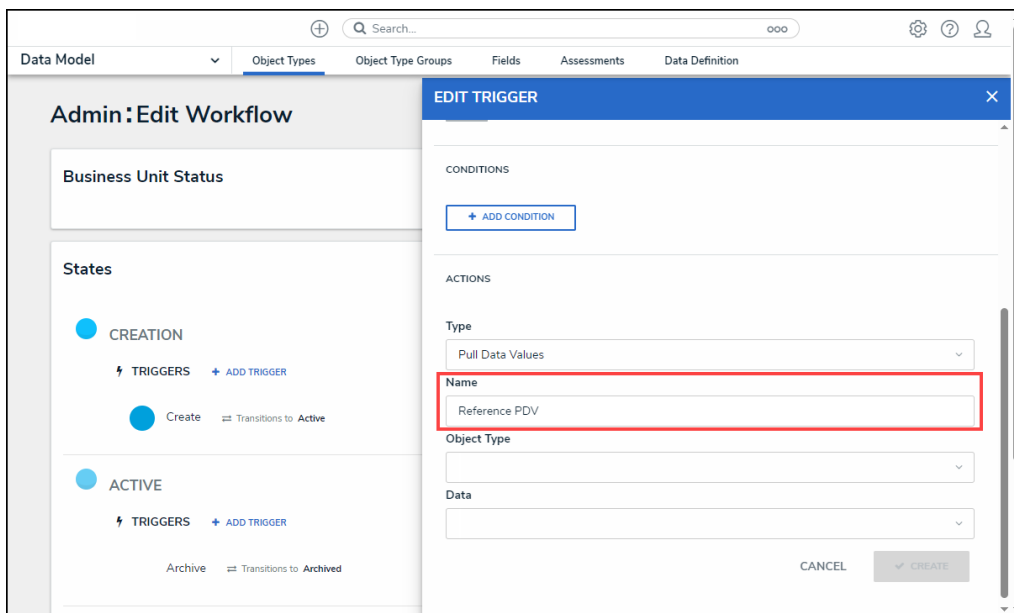
+ Add Action Button

4. From the **Action** section, select the **Pull Data Values** from the **Type** dropdown menu.



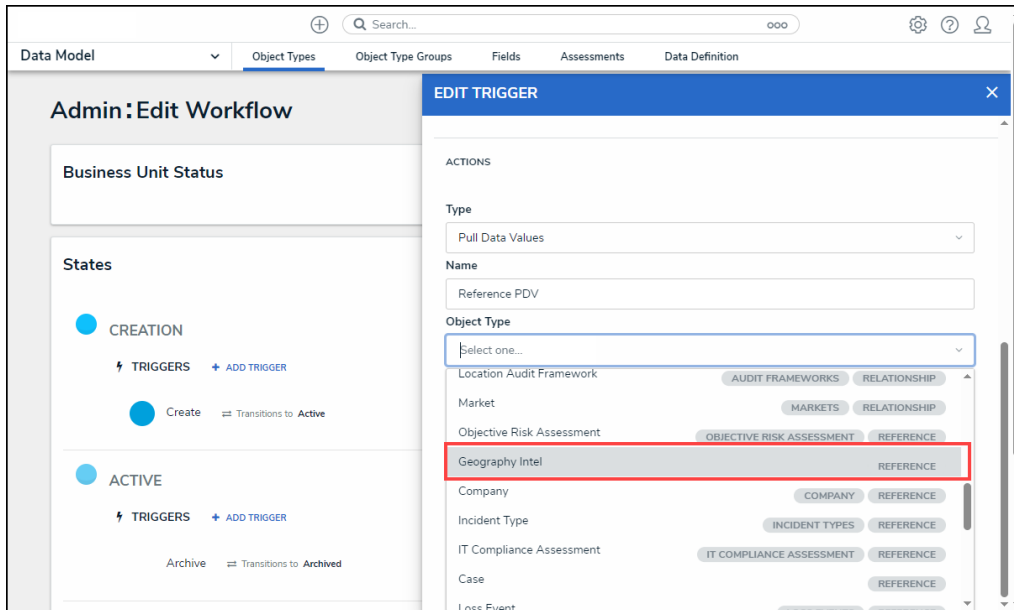
Pull Data Values

5. Enter a name for the transitions in the **Name** field.



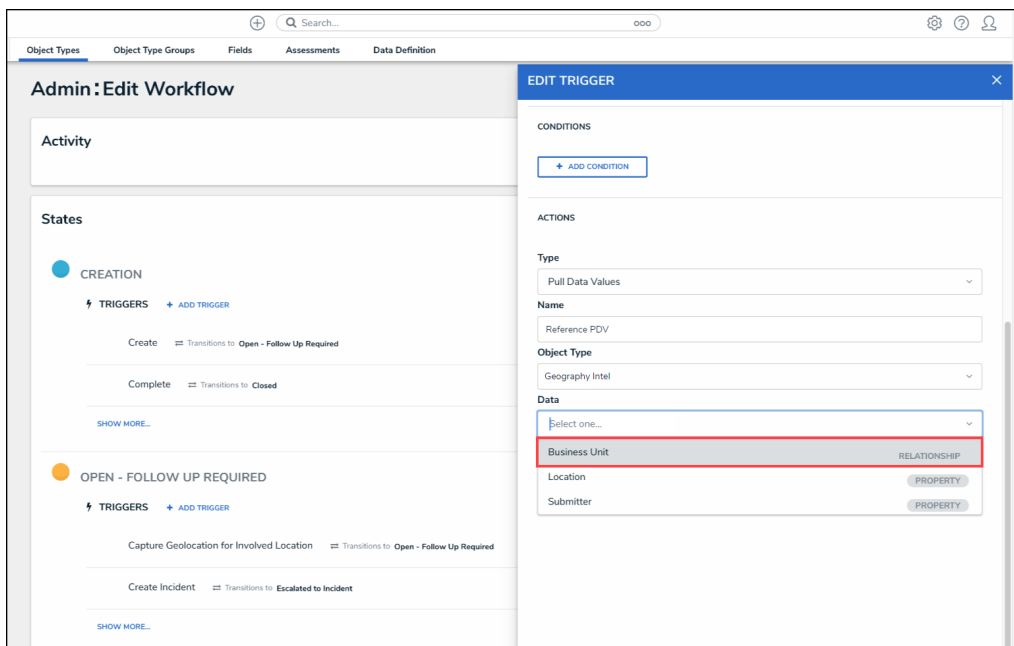
Name Field

6. Select a **Reference** from the **Object Types** dropdown menu.



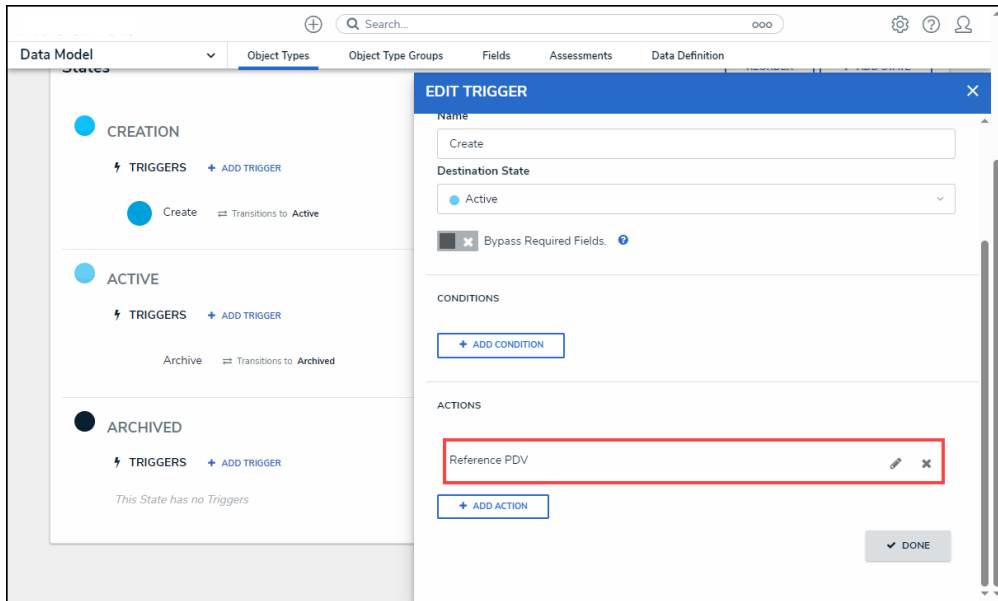
Select a Reference

7. Select a **Relationship** from the **Data** dropdown menu.



Select a Relationship

8. Click the **Create** button to add the Action to the Workflow Trigger.



New Action