Actions

You can define a UI action for an entity that will happen when pressing a button. There are several types of actions:

- DropDown Action
- Menu Action
- Report Action
- Sequential Workflow Action

In parameter mapping you can define which values will be used as parameters. For sequential workflow action you can also define a client script which will be executed when the result of the action is delivered.

ATTRIBUTES

There are several attributes that are applicable for all action types:

Form	On which screen will the button be visible.
Panel	On which screen section will the button be visible. You can select only a form, only a panel or both to better specify the placement of the button.
Roles	Required roles to make the button visible.
Rule	Required rule to make the button visible, e.g. a condition or a field value in the active record.
ValueType	Possible values are `SavedValue` and `ActualValue`.
ActionType	Select the type of the UI action. Possible values: - `Report` - used for Report Action - `Change UI` (obsolete) - `OpenForm` - used for Sequential Workflow Action that contain user interface tasks - `Workflow` - used for Sequential Workflow Action that doesn't contain user interface tasks - `QueueAction` - `SelectionDialogAction` - used for Menu Action - `Dropdown` - used for Dropdown Action
RefreshAfterReturn	Not applicable for Sequential Workflow Action. Possible values: - `None` - nothing is reloaded - `ReloadActualRecord` - reload the current master record of the screen (with all the details), intended to use only with lazily loaded screens - `RefreshCompleteForm` - reload all the data of the screen - `MergeModalDialogChanges` - applicable only if IsModalDialog = true, it merges the data from the last modal dialog screen back into the screen that the modal dialog was run from
RefreshAfterWorkflow	Applicable only for Sequential Workflow Action and Menu Action. Possible values: - `RefreshChangedRecords` - used for Menu Action, reload only changed records - `ReloadActualRecord` - reload the current master record of the screen (with all the details), intended to use only with lazily loaded screens - `RefreshCompleteForm` - reload all the data of the screen
ButtonIcon	You can select a saved image that will be displayed above the button caption.

Mode	Which records will be affected by the action. Possible values: - `ActiveRecord` - The action is related to the active record. If there is no record, the action is not available. Active record can be used as an input for the workflow. - `MultipleCheckboxes` - The action is related to the selected records. If there are no records selected, the action is not available. Selected records can be used as an input for the workflow (passed as "." in parameter mappings). - `Always` - The action is not related to the records. Data context can be used as an output for the workflow but not as an input.
Placement	Select if the button will be displayed in the `Toolbar` for the whole page or in the `PanelHeader` of the screen section.
ConfirmationMessage	Select a string that will be displayed before executing the action.
ConfirmationRule	Select a rule that will be checked before executing the action.