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PracticeMaster WorkFlows Guide

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PracticeMaster WorkFlows Guide

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Purpose of Guide

The PracticeMaster WorkFlows Guide covers how and why to use WorkFlows. This guide includes WorkFlow concepts, building WorkFlows, examples of WorkFlows, detailed information on the WorkFlow Definition window, best practices, and technical information.

Additional guides for other software features are also available on our Web site at:

Tabs3.com/support/docs.html

Introducing WorkFlows

WorkFlows are a type of macro available in PracticeMaster that can be set up to run automatically after a certain event occurs, manually when a user chooses to activate it, or both. WorkFlows allow you to select predefined actions to occur based on the creation of or changes made to other records. When set up to run automatically, WorkFlows allow streamlining of common tasks by automatically starting another task related to the previous creation or change.

WorkFlows can perform the following actions:

- **Create New Record** *(page 17)*
  - EXAMPLE: Add a task for RON when a journal record is added for his client.
- **Change Record** *(page 18)*
  - EXAMPLE: When a client goes to collections, change the client's Work Description to reflect this.
- **Process Calendar Plan Template** *(page 20)*
  - EXAMPLE: When a Statute of Limitations Date is entered, open the Calendar Plan Template for Statute of Limitations Reminders.
- **Generate CalendarRules** *(page 20)*
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- **Start Document Assembly** *(page 23)*
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- **Start or Send eNote** (Platinum only) *(page 26)*
  - EXAMPLE: When a record is deleted, send information for the deleted record to the administrator.
- **Display Message** *(page 28)*
  - EXAMPLE: Display a message when a fee is entered with more than 6 Worked Hours.
- **Run Report Writer Report** *(page 30)*
  - EXAMPLE: When a matter is closed, run the Client Summary Report for filing purposes.
- **Launch PracticeMaster Program** *(page 30)*
  - EXAMPLE: When a new client or contact is added, open the Conflict of Interest window.
- **Launch Other Program** *(page 31)*
  - EXAMPLE: When a new client is added, run the command TBDEVICE.EXE /VALIDATION.

Using WorkFlows

WorkFlows can be set up to run automatically based on an event (such as when a new client is saved, a fee is changed, etc.), or when initiated by a user.

Note: Keep in mind that WorkFlows are not the same as scheduled tasks. In order for WorkFlows to run, there must be a triggering event. WorkFlows are completely dependent upon user action and cannot be scheduled to occur.

Automatic WorkFlows

WorkFlows can be set up to run automatically when a record is added, changed, or deleted *(page 15)*. When setting up a WorkFlow to run automatically, you have two options. You can set the WorkFlow to prompt the user to confirm whether they want to run the WorkFlow (**Prompt Before Running** *page 14*), or you can set the WorkFlow to run without a prompt. For certain actions, you can also set the WorkFlow to "Automatically save and close", thus allowing further automation. This option is useful when you don't want the user to have any control over whether the action will complete.

An example of an automatic WorkFlow is if you want to automatically open Document Assembly to generate a thank you letter when a new client is saved.

Manual WorkFlows

WorkFlows can also be set up to only run when **User Activated** *(page 15)*. This means that a user would need to select one or more records and then manually click the desired WorkFlow in the **WorkFlow** group of the Quick Clicks pane. If a WorkFlow is set to only run when user activated, then that WorkFlow cannot be triggered by the saving of another record; it will only run when specifically selected. However, you can specify a WorkFlow to be run automatically as well as user activated.

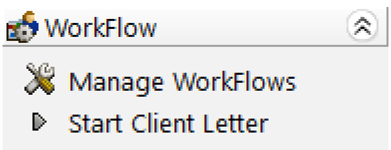


Figure 1, WorkFlow Group of the Quick Clicks Pane

An example of a user activated WorkFlow is if you want to change the Bill Code for multiple fee records to Non-Billable/Printable.

Tip: Only User Activated WorkFlows can be accessed in the **WorkFlow** group of the Quick Clicks pane.

Building WorkFlows

WorkFlows can be set up to activate a single action, or multiple actions. Let's look at a scenario to get an idea of the options available.

The three main components for building WorkFlows are as follows:

- **Designing the WorkFlow** - Making a plan for what you want the WorkFlow to accomplish.
- **Creating the WorkFlow** - Selecting the desired settings for the WorkFlow Definition.
- **Testing the WorkFlow** - Verifying that the WorkFlow does what you want, and only what you want.

Designing the WorkFlow

When designing a WorkFlow, there are several questions you want to ask that will help you determine which settings to select. These questions are based on the different parts of the WorkFlow definition window.

Let's say you want to create a WorkFlow that will notify the user when a saved fee has more than 6 **Hours Worked**, and then display the Fee record with the **Hours Worked** highlighted for review. Where do you start when determining how to build the WorkFlow? Let's go through each of the questions to ask yourself using this scenario.

Which file does the WorkFlow affect?

The Fee file.

Do you want to run the WorkFlow automatically, or give the user a choice of whether to run it or not?

Automatic.

Do you want it to run for all records, or only when records meet specific criteria?

Run only for records where the **Hours Worked** field is more than 6. By adding a filter, the WorkFlow will only run when the **Hours Worked** field has a value greater than 6. This WorkFlow will not run if a user enters the **Hours Worked** as 6 or less.

Do you want the WorkFlow to run when a record is added, changed, or deleted?

Added and changed. When selecting only these options, the WorkFlow will run when a fee is added or changed; however, this WorkFlow will not run when a fee record is deleted.

Do you want the WorkFlow to run on demand?

No.

Should the WorkFlow run regardless of which fields are affected, or should it only run when certain fields are affected?

Certain Field(s). By specifying the **Hours Worked** field, the WorkFlow will only run when the **Hours Worked** field is affected. Changes to any other fields will be ignored. For example, if the **Timekeeper** field is changed to “7”, but no other changes are made, the WorkFlow will not run.

What action(s) should happen?

A message is displayed, and then the Fee the user saved is opened (source record) with the **Hours Worked** field highlighted.

Creating the WorkFlow

Let's create a WorkFlow based on the above example: a WorkFlow that will notify the user when a saved fee has more than 6 **Hours Worked**, and then display the Fee record with the Hours Worked highlighted. Because there are several pieces to this WorkFlow, we will build the WorkFlow in 3 phases. This allows us to test in between each addition, making sure each piece works as expected before adding a new one.

Phase 1:	Build a WorkFlow that displays a message whenever anyone adds a fee or changes the **Hours Worked** field in a fee.
Phase 2:	Add a filter to the WorkFlow so that the WorkFlow only runs when a saved fee has **Hours Worked** greater than 6.
Phase 3:	Add an action to the WorkFlow to also display the source record with the **Hours Worked** field highlighted.

Testing the WorkFlow

When creating WorkFlows, it is important to test them to make sure they run when they should, and that they don't run when they shouldn't. This can be accomplished by running multiple tests.

We will test the WorkFlow after each of the following phases.

Tip: When selecting the **Create New Record** or **Change Record** Action, you can optionally select the **Automatically save and close** check box. This option saves time by running the WorkFlow, and then automatically saving and closing the record so there are fewer click or keystrokes you have to make. However, we highly recommend testing the WorkFlow without the **Automatically save and close** check box selected to make sure the desired outcome is achieved. Once you are done testing, you can go back in and select the check box, if desired.

Building the WorkFlow

Complete the following to build a WorkFlow that displays a message when a fee is saved with more than 6 **Hours Worked**. After we build this WorkFlow, we'll take a look at all of the different WorkFlow settings in more detail.

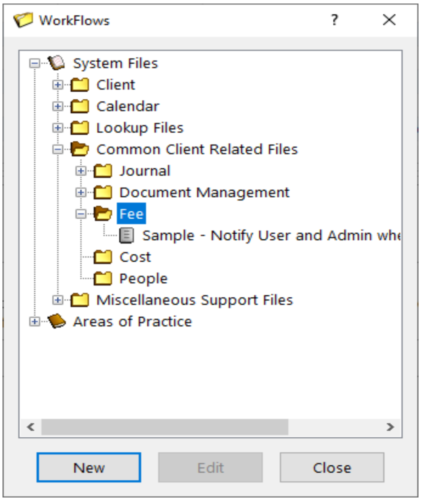
Phase 1: Build a WorkFlow that Displays a Message

First, let's create a basic WorkFlow that will display a message when anyone saves a new fee or changes the **Worked Hours** field and saves.

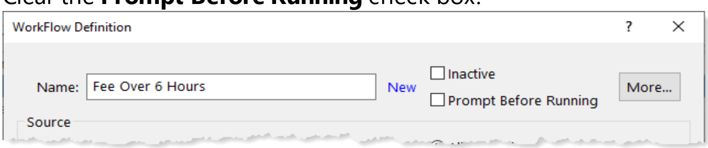
> **Tip:** WorkFlows can be added via ***Maintenance | WorkFlows***, or via the **WorkFlow** group of the Quick Clicks pane in the desired file (e.g., the Fee file). However, when adding WorkFlows from the desired file, certain selections will be made automatically (e.g., **User Activated** is selected by default). Because of this, we will add our WorkFlow via the ***Maintenance | WorkFlows*** menu option.

▸ To create a WorkFlow that displays a message when the Worked Hours are changed

1. From the **Maintenance** menu, select **WorkFlows**.
   a. Expand **Common Client Related Files**.
   b. Select **Fee** and click the **New** button.

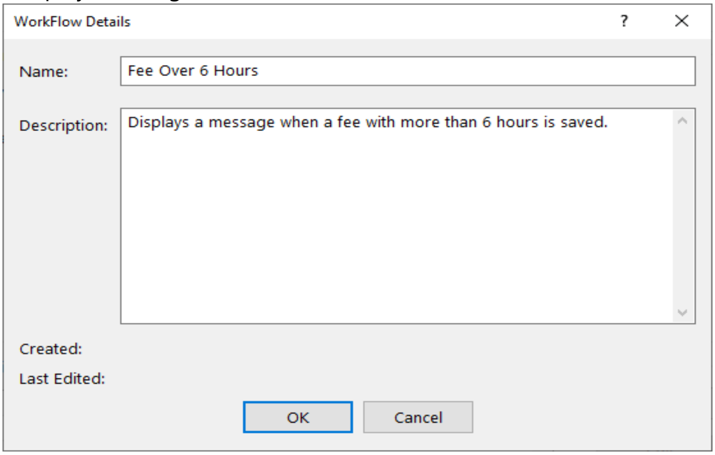


2. Enter the desired **Name** for the WorkFlow (e.g., "Fee Over 6 Hours").
   a. Clear the **Prompt Before Running** check box.



b. Click the **More** button.

i. Enter a **Description** for the WorkFlow that briefly explains the purpose (e.g., "Displays message when a fee w/more than 6 hours is saved").

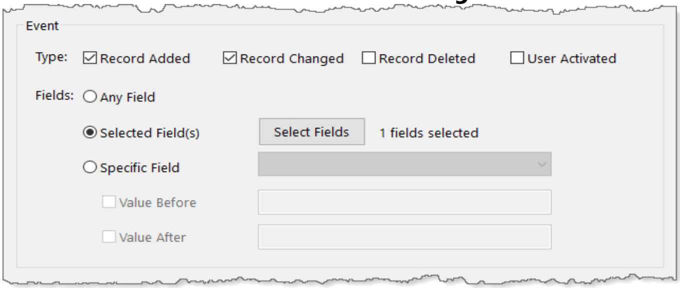


ii. Click **OK**.

3. In the **Source** section, we will leave **All Records** selected for now.

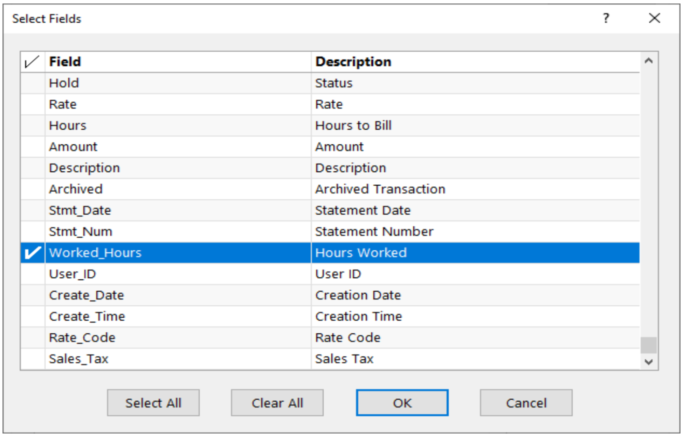
4. In the **Event** section:

a. Select the **Record Added** and **Record Changed** check boxes.



b. Select the **Selected Field(s)** option, and then click the **Select Fields** button.

i. Select **Worked_Hours**.



ii. Click **OK**.

5. In the **Actions** section, click the **New** button.
   a. Select **Display Message**.
   b. Click **Next**.
      i. Click in the **Title** to open the **WorkFlow Expression Editor**.
         A. Click the **Value** button.
         B. Enter the desired **Title** (e.g., "Verify Worked Hours").
         C. Click **OK** to close the Value window.
         D. Click **OK** to close the WorkFlow Expression Editor window.
      ii. Select the desired Icon.
      iii. Click in the **Body** to open the WorkFlow Expression Editor.
         A. Click the **Value** button.
         B. Enter the desired message in the **Body** (e.g., "Warning! The fee you just entered exceeds the recommended maximum number of 6 hours.").
         C. Click **OK** to close the Value window.
         D. Click **OK** to close the WorkFlow Expression Editor.
   c. Click **Finish**.
6. Click **Save**.

Testing Phase 1 of the WorkFlow

Perform the following tests to see if the desired message is displayed.

Does the WorkFlow run when it should?

- Enter and save a new fee.
- Change the **Hours Worked** field of an existing fee and save it.

Does the WorkFlow run when it shouldn't?

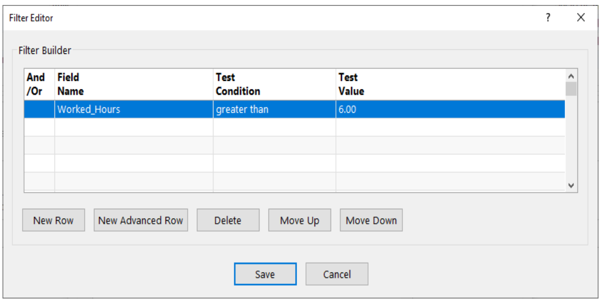
- Change a field other than the **Hours Worked** field of an existing fee and save it.

Phase 2: Adding a Filter to the WorkFlow

Next, let's add a filter so that the WorkFlow is only triggered when a new fee is saved that has more than 6 **Worked Hours**, or the **Worked Hours** of an existing fee is changed to more than 6 and saved.

▸ To add a filter to an existing WorkFlow

1. From the **Maintenance** menu, select **WorkFlows**.
   a. Expand **Common Client Related Files**.
   b. Expand **Fee**.
   c. Select the desired WorkFlow and click the **Edit** button.
2. In the **Source** section, select **Filtered Records** and click the **Filter** button.
   a. Select a **Field Name** of **Worked_Hours**.
   b. Select a **Test Condition** of **greater than**.
   c. Enter a **Test Value** of “6.00”.



   d. Click **Save**.
3. Click **Save**.

Testing Phase 2 of the WorkFlow

Perform the following tests to verify the message is only displayed when it is supposed to be.

Does the WorkFlow run when it should?

- Enter and save a new fee with more than 6 **Hours Worked**.

Does the WorkFlow run when it shouldn't?

- Change the **Hours Worked** field to 6 hours or less and save it.

Phase 3: Adding an Action to the WorkFlow

Last, let's open the fee record when the WorkFlow is triggered so that the user can easily edit the fee if necessary.

▸ To add an Action to an existing WorkFlow

1. From the **Maintenance** menu, select **WorkFlows**.
    a. Expand **Common Client Related Files**.
    b. Expand **Fee**.
    c. Select the desired WorkFlow and click the **Edit** button.
2. In the Action section, click **New**.
    a. Select **Change Record** and click **Next**.
    b. Select **Source Record**.
    c. Click the **Define Template** button.
        i. Click the **set** button to the right of Hours Worked.
        ii. In the Expression section, enter “@SrcRec:Worked_Hours”. This expression simply sets the Hours Worked to use the existing hours. Even though there is no actual change to the hours, this creates a mock change which highlights the field when the WorkFlow runs.
        iii. Click **OK**.
    d. Press Ctrl+S.
    e. Click **Finish**.
3. Click **Save**.

Testing Phase 3 of the WorkFlow

Perform the previous tests and click **OK** on the message box to verify that the Fee is opened after the message box is closed.

In Summary

Using three phases, we have built a new WorkFlow, added a filter, and added an additional action. We have also tested each phase. Our new WorkFlow notifies the user when a saved fee has more than 6 **Hours Worked**, and then displays the Fee record with the **Hours Worked** highlighted. This step-by-step example demonstrates how you can create a basic yet powerful WorkFlow to help prevent mistakes during data entry.

Now let's take a detailed look at the WorkFlow Definition Window, and all of its components.

WorkFlow Definition Window

Menu:	***Edit | WorkFlow***
Home:	***All Actions | Maintenance | WorkFlows***
Quick Launch:	***WorkFlows***

The WorkFlow Definition window is used to create or edit an individual WorkFlow. The WorkFlow Definition window is displayed when adding or editing a WorkFlow.

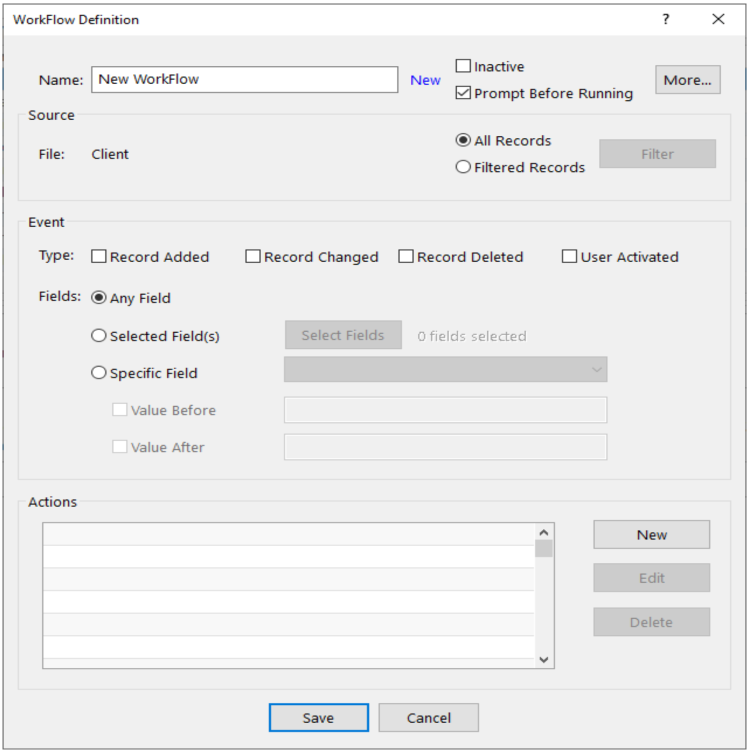


Figure 2, WorkFlow Definition Window

Name	Enter the desired name of the WorkFlow.
Inactive	Select the **Inactive** check box if you do not want the WorkFlow to be run.
Prompt Before Running	Selecting the **Prompt Before Running** check box will show a window prior to the WorkFlow running. The user can then decide if they want the WorkFlow to run or not. This option is not available If the **User Activated** check box is the only Event **Type** selected.
More button	The **More** button can be used to open the WorkFlow Details window, which includes the **Name**, **Description**, **Created**, and **Last Edited** fields. • The **Name** field is the same as the WorkFlow **Name**. Changing the Name here also changes the **Name** of the WorkFlow. • You can optionally enter a **Description** for the WorkFlow. This provides the ability to record details of what the WorkFlow's purpose is. • The **Created** and **Last Edited** dates are listed below.

Source Section

Use the **Source** section to determine which records trigger the WorkFlow to run.

File	The File label field displays the name of the file in which the WorkFlow is applicable.
All Records	Select **All Records** if you want the WorkFlow to apply to all records in the selected file.
Filtered Records	Select **Filtered Records** if you want the WorkFlow to only run for certain records.
Filter button	Click the **Filter** button to open the Filter Editor window to specify the criteria that will trigger the WorkFlow for only certain records.

Tip: Field availability depends on selected settings in the **Type** section.

Event Section

Use the **Event** section to determine what events will trigger the WorkFlow to run.

Type

Select which event(s) will trigger the WorkFlow to run.

Record Added	Select the **Record Added** check box if you want the WorkFlow to run when records are added to the selected file.
Record Changed	Select the **Record Changed** check box if you want the WorkFlow to run when records in the selected file are changed.
Record Deleted	Select the **Record Deleted** check box if you want the WorkFlow to run when records are deleted from the selected file.
User Activated	Select the **User Activated** check box if you want the WorkFlow to run when a user selects to run it. Users can select to run a WorkFlow via the WorkFlow group of the Quick Clicks pane.

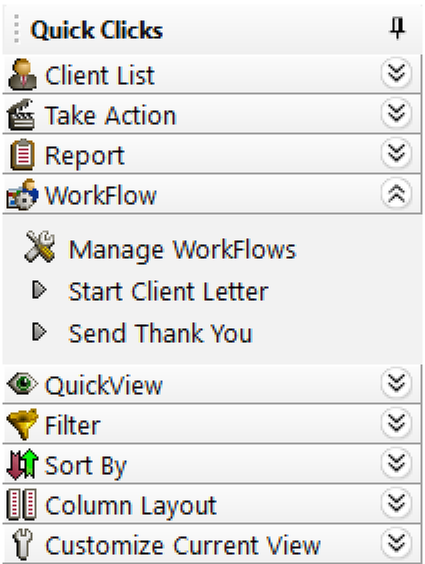


Figure 3, WorkFlow group of the Quick Clicks pane

Fields

The **Fields** section is available when the **Record Added**, **Record Changed**, or **Record Deleted** option is selected.

Any Field	Select the **Any Field** option if you want the WorkFlow to be triggered regardless of field.
Selected Field(s)	Select the **Selected Field(s)** option if you want the WorkFlow to be triggered when only certain fields are modified. Click the **Select Fields** button to select the desired fields.
Specific Field	If **Specific Field** is selected, the WorkFlow will only run when the value of the field selected is modified, as specified in the following. When **Specific Field** is selected, the **Value Before** and **Value After** fields are available. • If **Value Before** is selected, the WorkFlow will only run when the content of the field selected was set to the value entered in this field. If the value of the field selected does not match, the WorkFlow will not run. The **Value Before** field is only available when Specific Field is selected. • If **Value After** is selected, the WorkFlow will only run when the content of the field selected is set to the value entered in this field. If the value of the field selected does not match, the WorkFlow will not run. The **Value After** field is only available when Specific Field is selected.

Actions Section

The table of **Actions** at the bottom of the WorkFlow Definition window shows what actions will occur when the WorkFlow runs. Each row defines a single action that will occur upon running the WorkFlow.

New	Click the **New** button to open the WorkFlow Action Wizard *(page 17)*.
Edit	Click the **Edit** button to make changes to the selected action using the WorkFlow Action Wizard *(page 17)*.
Delete	Click the **Delete** button to delete the selected action.

WorkFlow Action Wizard

The WorkFlow Action Wizard is used to specify what action occurs when the WorkFlow is triggered. Multiple actions can be set up for each WorkFlow.

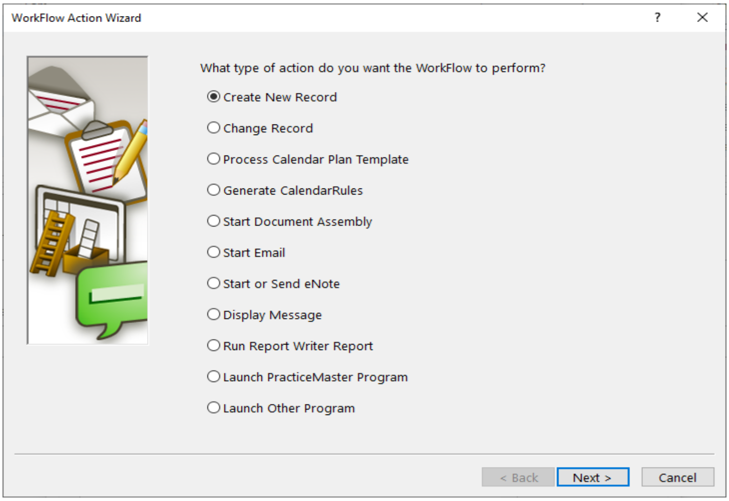


Figure 4, WorkFlow Action Wizard

Create New Record

The **Create New Record** option causes a new record to be created in any PracticeMaster file (e.g., you may want to add a calendar task for RON when a new client is added for Timekeeper #3). When selecting this option, you will be allowed to specify in which file the record will be added as well as define a template that specifies the default values for the record.

Select File	Select the PracticeMaster file in which the new record will be created.
Define Template	Click the **Define Template** button to open the WorkFlow Template Editor window *(page 33)*, thus allowing you to create or modify a Template for the new record.
Clear Template	Click the **Clear Template** button to delete the Template created for the action. This button is only available if a Template has been defined.

Automatically save and close

Select the **Automatically save and close** check box if you want the new record to automatically be saved, and the data entry window closed after the WorkFlow generates the new record.

Clear this option if you prefer the new record to remain open after it is generated. The user will need to review the record, make any additional changes necessary, then save and close the record.

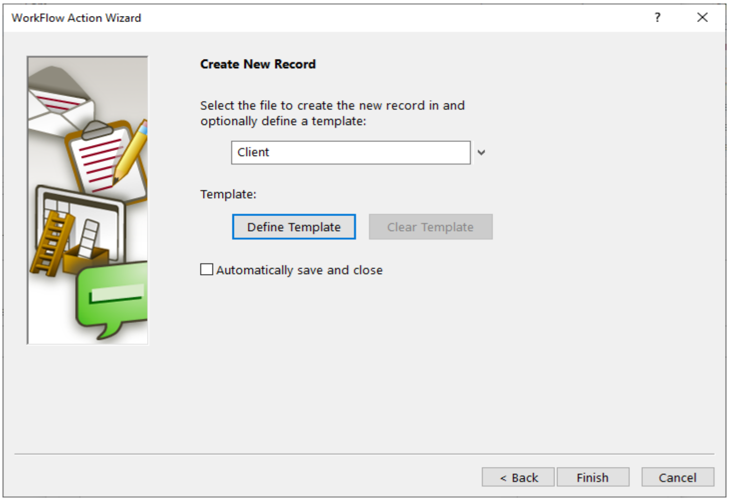


Figure 5, Create New Record

Change Record

The **Change Record** option causes an existing record to be changed in a PracticeMaster file (e.g., when a journal record is added, you may want to update the **Last Contact Date** for the client contact). When selecting this option, you can specify which record you want changed: the source record, a record linked to the source record, or a specific record that is not linked to the source record. Once you select which record you want modified, you will be allowed to define a template that specifies the values for the fields you want changed.

Source Record

Select the **Source Record** option if you want the same record that initiated the WorkFlow to be changed.

Linked Record

Select the **Linked Record** option if you want a record that is linked to the source record that initiated the WorkFlow to be changed.

Specific Record

Select the **Specific Record** option if you want to change a specific record, regardless of what record initiates the WorkFlow. When this option is selected, you must select both the **File** and the **Record** that you want changed.

Define Template

Click the **Define Template** button to open the WorkFlow Template Editor window *(page 33)*, which allows you to create or modify a Template for the new record.

Clear Template

Click the **Clear Template** button to delete the Template created for the action. This button is only available if a Template has been defined.

Automatically save and close

Select the **Automatically save and close** check box if you want the new record to automatically be saved, and the data entry window closed after the WorkFlow generates the new record.

Clear the **Automatically save and close** check box if you prefer the new record to remain open after it is generated. This allows the user to review the record, make any additional changes necessary, then save and close the record.

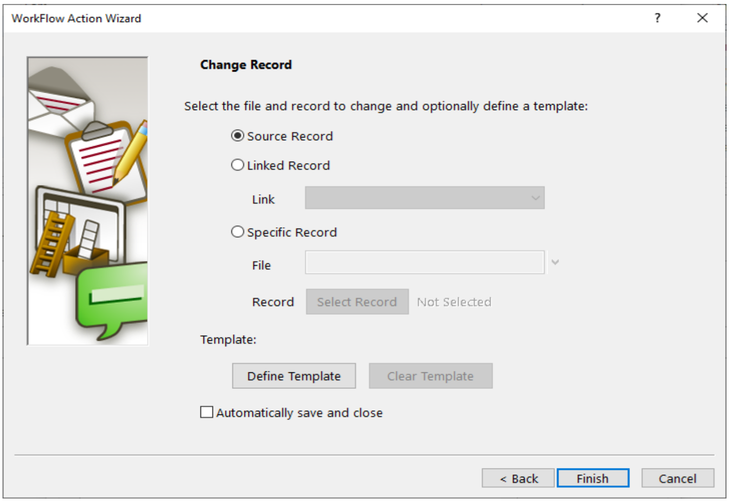


Figure 6, Change Record

Process Calendar Plan Template

The Process Calendar Plan Template option creates a Calendar Plan using an existing Calendar Plan Template when the WorkFlow is run (e.g., when a **Statute of Limitations Date** is entered for a client, the Calendar Plan Template for Statute of Limitations Reminders will automatically be displayed). Select the desired Calendar Plan Template from the list.

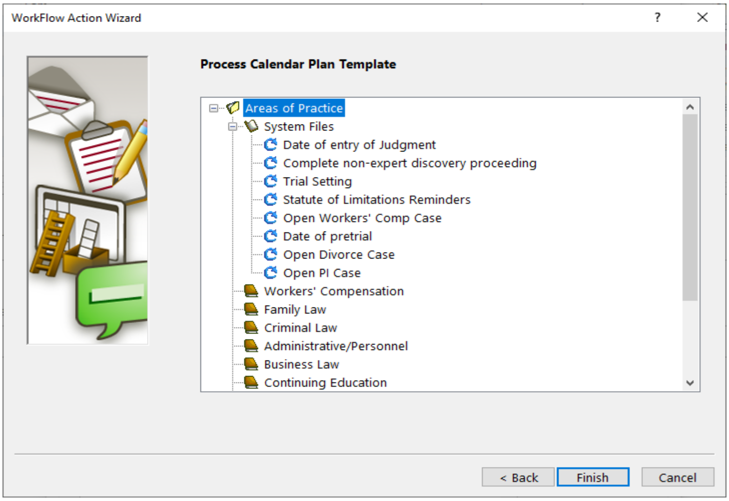


Figure 7, Process Calendar Plan Template

Generate CalendarRules

The Generate CalendarRules option starts a Calendar Plan using a pre-defined Rule Set, provided by **CalendarRules**, when the WorkFlow is run. Specify the default values for the Generate CalendarRules program.

Client — Specify the client associated with the calendar records that will be created by the Calendar Plan. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.

Contact

Optionally specify a contact for the calendar records of the Calendar Plan. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.

Jurisdiction

Enter the relevant jurisdiction for the Calendar Plan you are creating. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.

Trigger Item

Enter the name of the **Trigger Item**, which corresponds to the **Key item** for the Calendar Plan. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.

Note: The **Jurisdiction** and **Trigger Item**, if specified, must be entered exactly as they appear in CalendarRules.

Date

Specify the date of the **Trigger Item**, which will be used as a basis for calculating the due date of each calendar record generated from the Calendar Plan. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.

Time	Specify the time of the **Trigger Item**, if needed. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks. **Note:** If a value is specified in the **Time** field, the **Trigger Item** will be created as an Event with the **Time** value specified as the **Start Time** and the **Time** value plus one hour as the **End Time** for the event. If no value is specified in the **Time** field, the Trigger Item will be created as a Task, unless the **Trigger** check box is selected in the **Record Types** section of the CalendarRules Integration window, in which case it will be created as an all-day event.
Service Type	Enter the method by which any documents will be served or filed. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.
User/Group	The **User/Group** field is used to specify a user, multiple users, or groups to which the calendar records will be assigned when the Calendar Plan is created. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.
Prepend Notes to Comments	Select the **Prepend Notes to Comments** check box to make the **Notes** field available in the Generate CalendarRules window.

Notes

Information entered in the **Notes** field will be prepended to the **Comments** field of the calendar records created by the Calendar Plan. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks.

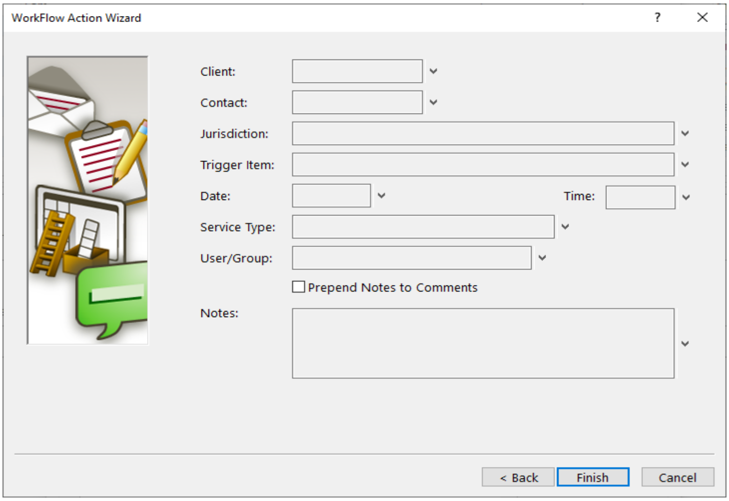


Figure 8, Generate CalendarRules

Start Document Assembly

The **Start Document Assembly** option causes PracticeMaster to begin assembling a document from a selected document template when the WorkFlow is run (e.g., adding a Client record starts Word Document Assembly for a client letter). When selecting this option, you can select which document assembly method you are using and the name of the document template.

Word document

Select **Word document** to begin Word Document Assembly when the WorkFlow is run.

HotDocs document

Select **HotDocs document** to begin assembling a Word, WordPerfect, RTF, or TTX document using HotDocs Document Assembly when the WorkFlow is run.

Document template

Specify the location and name of the Document template file.

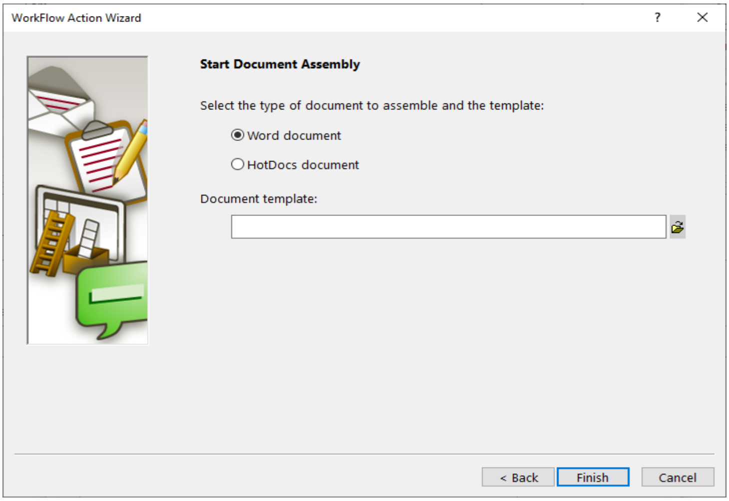


Figure 9, Start Document Assembly

Start Email

The Start Email option creates a new email in your default email software when the WorkFlow is run (e.g., when a claim is filed, an email to the client is started).

To	Specify the email address(es) to which the new email will be sent. Clicking in the **To** field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks. Multiple recipients must be separated with a comma.
Cc	Specify the email address(es) to which the new email will be carbon copied. Clicking in the **Cc** field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks. Multiple recipients must be separated with a comma.

Bcc	Specify the email address(es) to which the new email will be blind carbon copied. Clicking in the **Bcc** field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks. Multiple recipients must be separated with a comma.
Subject	The **Subject** field can be used to specify the topic of your message. Clicking in the **Subject** field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks. Although this field does not have a character limit when creating the expression, the text resulting from the expression is subject to a limit of 60 characters. If the character limit is exceeded, it will be truncated and a "…" will be appended to the text.
Body	The **Body** field contains the main text of the email. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. If you want to enter text, use the **Value** button, or enclose the text in quotation marks. Although this field does not have a character limit when creating the expression, the text resulting from the expression is subject to a limit of 30,000 characters. If the character limit is exceeded, it will be truncated and a "…" will be appended to the text.
Include event information	Select the **Include event information** check box to include a summary of the event below the **Body** text provided. This information includes the WorkFlow Name, the WorkFlow Event Type, the record number and additional information based on the type of record that initiated the WorkFlow. The additional information is different for each PracticeMaster file.

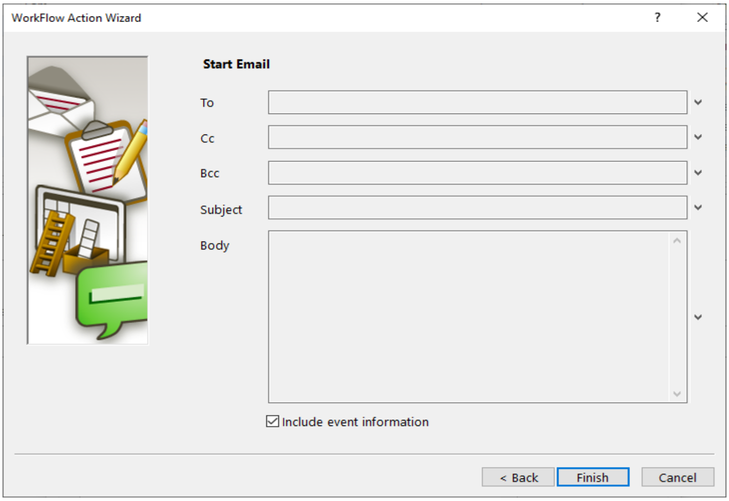


Figure 10, Start Email

Start or Send eNote *(Platinum Only)*

The **Start or Send eNote** option causes an eNote to be created (and optionally sent without prompting) when the WorkFlow runs (e.g., when a record is deleted, send the information for the deleted record to the administrator).

To	The **To** field contains the User ID to which the new eNote will be addressed. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. Multiple recipients must be separated with a comma.
Urgent	Select the **Urgent** check box to send the eNote as Urgent, thus bypassing the online recipient's status selection and preferences.
Message	The **Message** field contains the body of the eNote in the Message field. Clicking in this field or on the lookup button displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs.

eNotify	Select the **eNotify** check box to include an eNotification link to the record, as well as additional information based on the type of record that initiated the WorkFlow. The additional information is different for each PracticeMaster file.
Automatically send	Select the **Automatically send** check box to send the eNote without prompting the user when the WorkFlow is run. Clear the **Automatically send** check box to create the eNote and prompt the user before sending it when the WorkFlow is run.

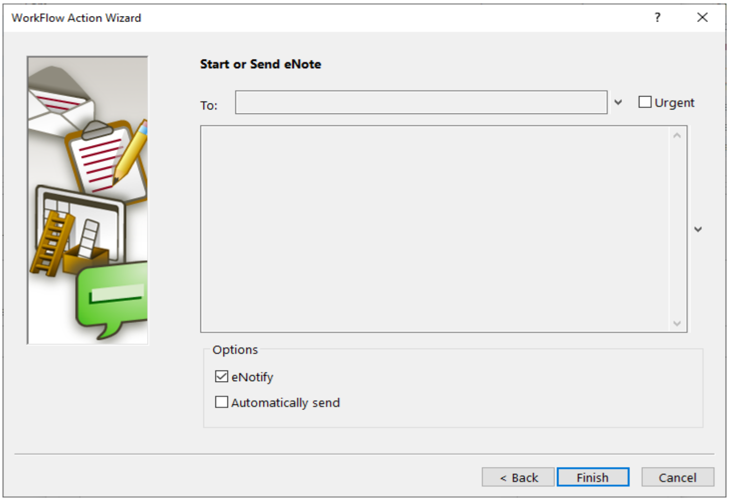


Figure 11, Start or Send eNote

Display Message

The **Display Message** option causes a message window to be displayed to the user initiating the WorkFlow when the WorkFlow is run (e.g., you may want to display a message when a fee is entered with more than 6 **Worked Hours**).

Title

The **Title** field contains the title of the message to be displayed. Clicking in this field, or on the lookup button, displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. Although this field does not have a character limit when creating the expression, the text resulting from the expression is subject to a limit of 50 characters. If the character limit is exceeded, it will be truncated and a "..." will be appended to the text.

Icon

None: When **None** is selected, no icon will be shown in the message.

Exclamation: When **Exclamation** is selected, the Exclamation icon ( ) will be displayed to the left of the message.

Question: When **Question** is selected, the Question icon ( ) will be displayed to the left of the message.

Information: When **Information** is selected, the Information icon ( ) will be displayed to the left of the message.

Body

The **Body** field contains the body of the message. Clicking in this field, or on the lookup button, displays the WorkFlow Expression Editor window *(page 34)*, allowing you to specify an expression. This expression will be used to create the value in this field when the WorkFlow runs. Line breaks are supported in this message. Although this field does not have a character limit when creating the expression, the text resulting from the expression is subject to a limit of 1,000 characters. If the character limit is exceeded, it will be truncated and a "..." will be appended to the text.

Include "Do not show again" option

Select the **Include "Do not show again" option** check box to treat the WorkFlow message box as an optional confirmation message. When this check box is selected, a **Do not show again** check box will be included on the displayed WorkFlow message box, thus allowing the user to prevent the message from being displayed the next time he or she performs that task. Optional confirmation messages will not be displayed again unless the Reset Optional Messages command is used, or the user profile is reset in System Configuration. This option is tracked separately for each user.

Clear the **Include "Do not show again" option** check box if you want the WorkFlow message box to be displayed each time the specified task is performed, without allowing the user to select not to see that message again.

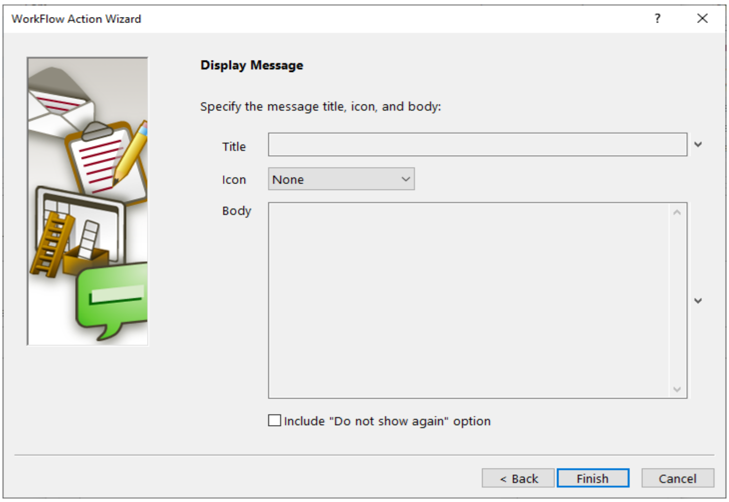


Figure 12, Display Message

Run Report Writer Report

The **Run Report Writer Report** option causes a Report Writer report definition to be run when the WorkFlow runs (e.g., when a matter is closed, you may want to run the Client Summary Report for filing purposes). Select the report to run from the list. Only one report can be selected.

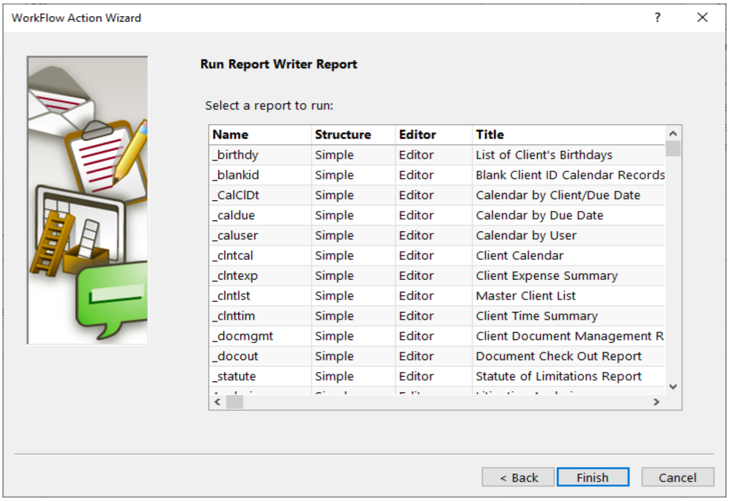


Figure 13, Run Report Writer Report

Launch PracticeMaster Program

The **Launch PracticeMaster Program** option allows you to open a PracticeMaster program when the WorkFlow is run, including data entry windows (such as the Client editor or Fee Entry window), Calendar windows, Reports, and Maintenance functions (e.g., when a new client or contact is added, the Conflict of Interest window will open). Select the PracticeMaster program to open from the list.

Although this action can open a data entry program, no changes are made to any records.

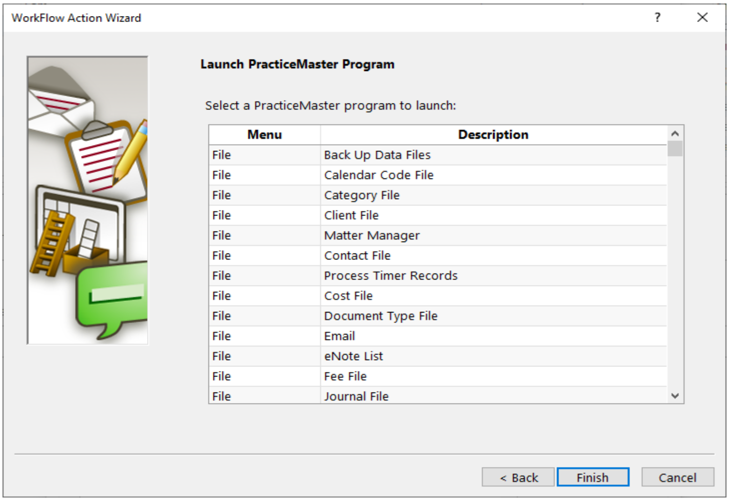


Figure 14, Launch PracticeMaster Program

Launch Other Program

The Launch Other Program option causes another program to be launched when the WorkFlow runs (e.g., when a new client is added, TBDEVICE.EXE /VALIDATION will run). Use this option to open other commonly used applications, such as word processing, billing, spreadsheet, or backup software.

Select a program to launch

A File field indicating the location and name of the program file.

Define program options

Optionally appends command line options to the application being run.

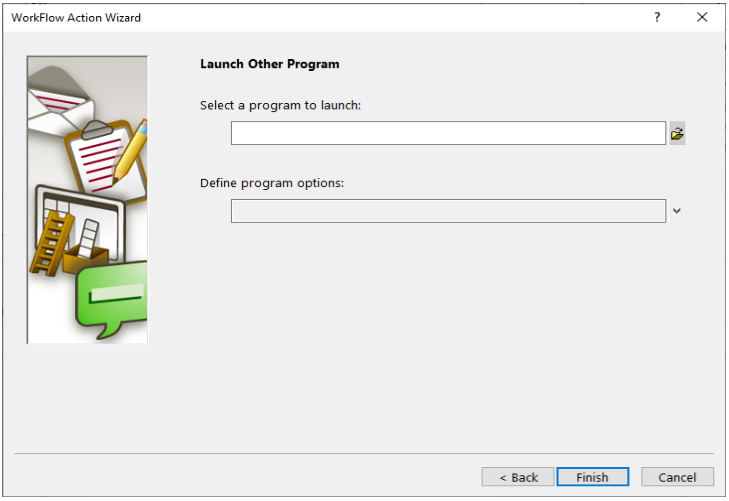


Figure 15, Launch Other Program

WorkFlow Template Editor

The WorkFlow Template Editor window is a specialized editor window used to select which fields will be predefined when a WorkFlow runs.

The Template Editor overlays the fields of the standard Editor window for the selected file with **set** buttons. Clicking a **set** button displays the Expression Editor window, allowing you to specify an expression. This expression will be used to create the value in that field when the WorkFlow runs.

The WorkFlow Template Editor window can be accessed via the following WorkFlow Actions:

- Create New Record
- Change Record

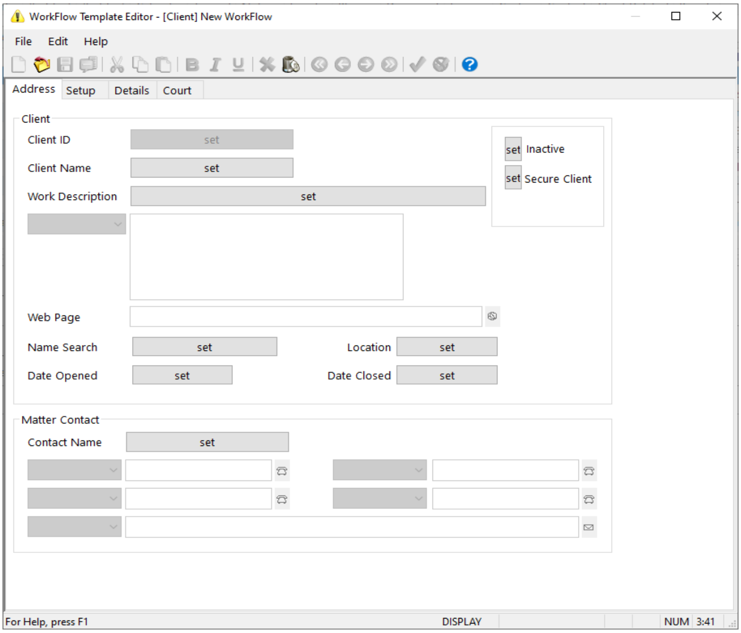


Figure 16, WorkFlow Template Editor for the Client file

WorkFlow Expression Editor and Template Expression Editor

The WorkFlow Expression Editor and Template Expression Editor windows let you define an expression to determine what information will be included in the selected field.

The WorkFlow Expression Editor or Template Expression Editor window can be accessed via the following WorkFlow Actions:

- Create New Record
- Change Record
- Start Email
- Start or Send eNote
- Display Message

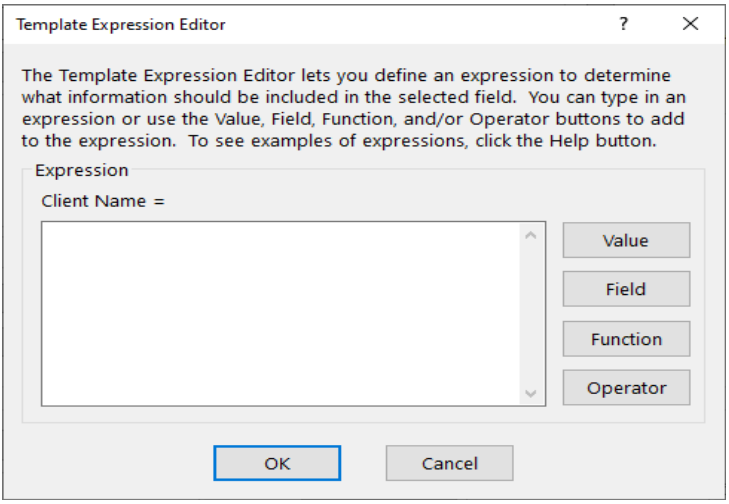


Figure 17, Template Expression Editor

The following fields are available in the WorkFlow Expression Editor and Template Expression Editor.

Expression

The Expression field contains the actual expression. You can type in an expression or use the **Value**, **Function**, **Operator**, and/or **Field** buttons to add to the expression. There is no limit to the length of the expression. The field being set is shown at the top of the Expression field.

Value	The **Value** button can be used to open the Value window allowing you to select a record or enter a value or text for the selected field. For example, if you just want to enter text in the body of an email when defining a WorkFlow, click the **Value** button and enter your text. After clicking **OK**, the text will show in the Expression enclosed in quotes. As another example, when setting a calendar code field for a Calendar WorkFlow Template, you can select a Calendar Code from a Lookup Window using this option. Likewise, a date field would allow you to specify a date or select one from a Calendar Window.
Field	The **Field** button can be used to open the Available Fields window allowing you to select the desired field from the file or a system field. For example, when defining a Calendar WorkFlow Template that runs when a new client is added, you can specify the Due Date field as @SrcRec:Date_Open. This will default the Due Date to the same value as the Date Opened for the client record.
Function	The **Function** button can be used to open the Available Functions window allowing you to select the desired function. For example, the function DATE$( ) can be used to insert the current system date into a date field.
Operator	The **Operator** button can be used to open the Available Operators window allowing you to select the desired operator. For example, you can use mathematical operators to modify values, such as setting a date field to one week from the current system date using the expression DATENUM( )+7.

Tip: For more information on creating expressions, see Knowledge Base Articles **R11493**, "All About Expressions;" **R11515**, "Filter Expression Examples;" and **R10750**, "PracticeMaster Report Writer, Filter, and WorkFlow Functions."

Accessing Lookup Files and Virtual Fields

When using the Expression Editor, clicking the **Field** button shows the fields that can be selected. Currently, there is no method of accessing fields through a lookup file, and virtual fields are not shown in the Available Fields window. However, you can access fields in lookup files and use virtual fields by manually entering them in the Expression Editor.

For example, let's say you are creating a WorkFlow for the Calendar File to create an email where you want to use the First Name field from the Contact record associated with the calendar record.

1. From the WorkFlow Action Wizard, select **Start Email** and click **Next**.
2. Click the **Body** field to open the WorkFlow Expression Editor.
3. Click the **Field** button and select the **Related_Party** field. The text @SrcRec:Related_Party will be displayed.
4. Because you want the First Name from the contact to show in the calendar record, you must append a colon, followed by the field ID (i.e., :First_Name) to the end of the string so that it reads:
   @SrcRec:Related_Party:First_Name

Let's say you want to use the salutation and last name from the Client Contact for the Client associated with the calendar record (as opposed to the Contact field on the calendar record). To generate the string "Dear Mr. Smith,", you would enter the following in the Body field of the Expression Editor:

```
"Dear " + @SrcRec:Client_ID:Contact:Salutation + " " + @SrcRec:Client_
ID:Contact:Last_Name + ","
```

Note that in the above example, we appended the field and the lookup file's field to the end of the Client_ID field.

Virtual fields can be accessed by manually entering @SrcRec: followed by the field ID of the virtual field. For example, when creating a record from the client file, to access the client file's Date of Birth virtual field (DOB), you would enter: @SrcRec:DOB

Best Practices

This section contains tips and limitations for creating functional WorkFlows.

- **Test your WorkFlows** - It is important to test your WorkFlows *(page 7)* to make sure they work as expected. If you make modifications, test the WorkFlow again.
- **Create On Demand WorkFlows** - Take advantage of the **User Activated** feature *(page 15)* to list the WorkFlows in the Quick Clicks pane. This provides the ability for users to initiate a WorkFlow for common actions.
- **Easily Disable a WorkFlow** - Use the **Inactive** check box *(page 14)* to quickly disable a WorkFlow until changes can be made.
- **Avoid Recursive WorkFlow Actions** - When a WorkFlow changes the source record, it is possible to create a “loop”. This can easily be seen by creating a **Change Record** action that modifies the source record, when the *Event Type* includes **Record Changed** and the *Event Field* includes **All Fields**. Each time the record is saved, a new change will be started for that record.

  To avoid these situations, use the **Selected Fields** option *(page 16)*, and select all fields that should cause the WorkFlow to run except the field(s) being modified by the Change Record action.
- **Prompt for Optional WorkFlow Actions** - When a WorkFlow will start actions that do not always need to be performed, use the **Prompt Before Running** option *(page 14)*. This allows users to “opt out” before any data entry windows are displayed.

  It is important to note that using the **Prompt Before Running** option *(page 14)* will cause *all* WorkFlow Actions to be run or canceled. If only some actions are optional, you may want to create one WorkFlow for required actions with the **Prompt Before Running** option cleared, and another WorkFlow for optional actions with the **Prompt Before Running** option selected.
- **Limit WorkFlows Using Filters** - Carefully consider whether a WorkFlow is necessary for all users or only certain users and implement filters as appropriate *(page 14)*. In some cases, it is important for WorkFlows to only run for one or more users, or only for clients assigned to a specific Timekeeper, Location, Category, Area of Practice, etc. When creating the WorkFlow, you can filter the records using those limitations. This will prevent users from having WorkFlows run when they are not necessary. This is done by creating or modifying the filter to include the USERID$( ) function and limit it to only the user (or users) for whom the WorkFlow will run. For example, if you want the WorkFlow to only run for a User named John, select **Filtered Records** and enter the following for the expression:

  ```
  USERID$()=”JOHN”
  ```

- **Only Automatically Create or Change Complete Records** - WorkFlows with an action of **Create a New Record** or **Change a Record** can optionally save and close the data entry window. While this allows automatic creation of records, it does not allow users to make any modifications to the record before it is saved. Be sure that the record being added or changed will have all of the necessary information before it is saved, or users will have to open the record again to make modifications.
- **Notify the Correct User** - Using the **Start or Send eNote** or **Display Message** actions both allow you to notify users of actions occurring in the software. However, the **Start or Send eNote** action is designed to notify a specific person, regardless of who initiates the change. The **Display Message** action shows a notification to the user who made the change which initiated the WorkFlow. Be sure to use the correct action in order to notify the desired user.
- **Chaining WorkFlows** - The Action of one WorkFlow can potentially run another WorkFlow. This is known as "chaining". When both actions modify the same record, this can potentially lead to recursive Actions, or "loops".

  When developing WorkFlows, it is often a good idea to break out some actions to separate WorkFlows, creating another WorkFlow that doesn't begin until the record from the action of another WorkFlow is saved. This can help users by only showing a small number of changes at once, allowing you to reuse WorkFlows for other chains, and allowing some actions to be run with different options (such as User Activated or Prompt Before Running).

  Tip: When chaining WorkFlows, it is possible to get into an endless loop, especially when using automatic create or change actions. When a series of automatic WorkFlows is run, a message will be displayed after the tenth automatic Create a New Record or Change a Record action, or when a single action attempts to run more than once. If you choose to continue, the message will be displayed again after then next ten automatic actions, or when a single action attempts to run again. This allows you to break out of the loop, and correct whatever WorkFlow(s) that may be causing the loop.

Technical Notes

This section contains limitations for creating WorkFlows.

- It is not possible to pull information from records other than the record being modified that causes the WorkFlow to run (using either the data prior to or after the change), or the record being created (when using the Create New Record action). This is a limitation of how WorkFlows are able to initiate events without changing existing data.
- Up to 10 Actions can be created for one WorkFlow. All Actions occur simultaneously; however, due to user interaction, the resulting changes must be processed one at a time.
- For a **Start or Send eNote Action**, when **Send automatically** is selected, this is considered a system-initiated eNote and will be sent even if the user does not have rights to create eNotes normally. However, the user MUST have the **Enable PracticeMaster eNotes** access right enabled for their access profile in System Configuration, even if all of the other functionality is disabled. If the **Enable PracticeMaster eNotes** access right is disabled, the eNote program is not started, so no eNotes can be sent.

  When using automatic eNote WorkFlows to notify users of changes, it is recommended that all users have the **Enable PracticeMaster eNotes** access right enabled in System Configuration, but only users who require eNote functionality have additional eNote rights (such as **Reply To eNotes**, **Send New eNotes**, or **Edit eNote Preferences**).
- WorkFlows only run when initiated by adds, changes, or deletions in PracticeMaster. WorkFlows cannot be run based on changes in an integrated system, such as Tabs3 Billing, Tabs3 Connect, Outlook, CalendarRules, or QuickBooks, nor when importing data into PracticeMaster or processing a calendar plan template.

  Tip: When processing a calendar plan template, if a WorkFlow should be run for an action in that template, make sure to select the **Stop on this item to edit fields when processing** option. The WorkFlow that will be run must have an action of **Change a Record** (the Calendar record is created before it is displayed, so **Create a New Record** WorkFlows will not run), and will only run if a change is made to the calendar item before saving this calendar record.
- When pulling an email address from the Client file, WorkFlows automatically look at the Email 1 field. If this field is blank, then the WorkFlow looks at the Email 2 field, etc. Furthermore, when a custom email address field is used in the Client file, and this field is blank, then the WorkFlow looks at the client's Email 1 field, etc.
- A single WorkFlow that contains more than one HotDocs document assembly action will not complete correctly. The first HotDocs document assembly action will attempt to begin, but will be overwritten by the subsequent document assembly. Additionally, the following error messages can be received when running multiple HotDocs document assembly actions:

  `Error starting HotDocs from PracticeMaster`

```
HotDocs encountered an error when attempting to assemble the last
document
```

To create multiple document assembly actions, it is recommended that multiple WorkFlows be created, that will "chain" the beginning of the next assembly when a Document Management record is created.

- User-activated WorkFlows can be run on a maximum of 1,000 records at a time. There is a limit of 149 user activated WorkFlows per file.

Sample WorkFlows

When PracticeMaster is installed, sample WorkFlows are included. These samples match the WorkFlows described in the Sample WorkFlows section of **R11307**, "All About WorkFlows", but their names are prepended with "Sample - ". These WorkFlows are provided to show the basic workings of the WorkFlow program, as well as to give the firm instant access to some of the most often requested WorkFlows. All sample WorkFlows are Inactive, and may need to be modified to work with your firm's data prior to being used.

Promotional WorkFlows

PracticeMaster is shipped with additional WorkFlows that are designed to increase awareness of new PracticeMaster features. When these WorkFlows run, a dialog box appears with a message regarding the feature, options to display information about WorkFlows now or at a later date, and the option to not show the message again. In the WorkFlows window, these WorkFlow names are prepended with "Promo - ". These WorkFlows cannot be edited, but can be deleted if desired.

Importing and Exporting WorkFlows

PracticeMaster allows you to import and export WorkFlow data. This procedure is commonly performed by Tabs3 and PracticeMaster consultants who have created custom WorkFlows for a firm. Full instructions on importing and exporting WorkFlows can be found in PracticeMaster Help.

Resources

Additional information regarding PracticeMaster WorkFlows can be found in the built-in help files, Guides, Videos, and the Tabs3 Knowledge Base.

Help

Help is installed with the software and is easily accessed by pressing F1, by clicking the button, or by selecting the ***Help | Help Topics*** menu option. Help includes detailed information regarding specific programs. Clicking the button opens Help for the window you are currently using. Many times, reading the appropriate Help topic may be the fastest way to find your answer.

Guides

There are multiple guides installed with the software. Select ***Help | Documentation*** for a list of all available resources. The following guides are useful references when setting up and customizing PracticeMaster:

- **Administrator Guide**
- **Customizing PracticeMaster Guide**

The guides can also be accessed via our Web site at:

Tabs3.com/support/docs.html

Report Packs

Report packs are available for all software. These report packs includes examples of each report in the software and include detailed information regarding each item on the report. Select ***Help | Documentation*** for a list of all available resources. The sample reports can also be accessed via our Web site at:

Tabs3.com/support/docs.html

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/video**.

Using WorkFlows

Knowledge Base

The Knowledge Base includes information regarding Tabs3 software products and is provided for end-users, consultants, and other third parties who work with Tabs3 software. It contains extensive information on Error Troubleshooting, Networking & Windows Issues, "How To" articles, and product-related articles. The Knowledge Base requires Internet access. Select ***Help | Internet Resources | Knowledge Base*** to access the Knowledge Base.

The following articles contain information related to PracticeMaster WorkFlows.

- **R11307** - All About WorkFlows
- **R11614** - WorkFlow Examples
- **R10750** - PracticeMaster Report Writer, Filer, and WorkFlow Functions
- **R10733** - PracticeMaster Report Writer, Filter, and WorkFlow Expression Errors
- **R11487** - Working with Indexes, Filters, and QuickViews
- **R11493** - All About Expressions
- **R11515** - Filter Expression Examples

The Knowledge Base can also be accessed at:

support.Tabs3.com

Tabs3 Support

Tabs3 Software provides some of the best support in the industry. Service to our customers is extremely important to us—so much so that our motto is:

Reliable software. Trusted service.

Support is provided at no charge with a maintenance plan and is available from 8:00 a.m. to 5:00 p.m. Central Time, Monday through Friday. If you have any questions, please feel free to call our Support staff at (402) 419-2210.

Email support is also available for all firms on maintenance. Our support team responds to emails during office hours. Our goal is to respond to your question within one business day. Please keep in mind that time-sensitive and complex issues are better handled over the phone. To request email support, visit **Tabs3.com/support**.

Tabs3 Consultants

Tabs3 software products are available through a national network of over 100 consultants. Those consultants are small independent firms that specialize in the sales of licenses and installation, training and support of billing, financial, and practice management software for law firms. By having consultants service all 50 states, you can work directly with a local person familiar with Tabs3 and PracticeMaster software, who can provide personalized on-site installation, training, and support services. Visit our Web site for a consultant near you or contact our Sales team at (402) 419-2200.

Tabs3.com/find-a-consultant

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