Basic Pre-Bill Approval Workflow

Workshop

Basic Pre-Bill Approval Workflow Workshop

Overview

In this workshop, we will cover how to create a basic 2-step pre-bill approval workflow.

It is recommended that you at least review our workflow articles on support.centerbase.com in the workflow section or work through the 'Basic Workflow Workshop' prior to creating your own Pre—Bill Approval Workflow. Those articles and workshops will help you familiarize yourself with how to navigate a workflow and what Nodes, Commands, Actions, and Record Types are.

Workshop Step by Step

First, let's create a new workflow with the following information:

Name: Pre-Bill Approval Workflow

Description: (Optional)

Item Type: Bills

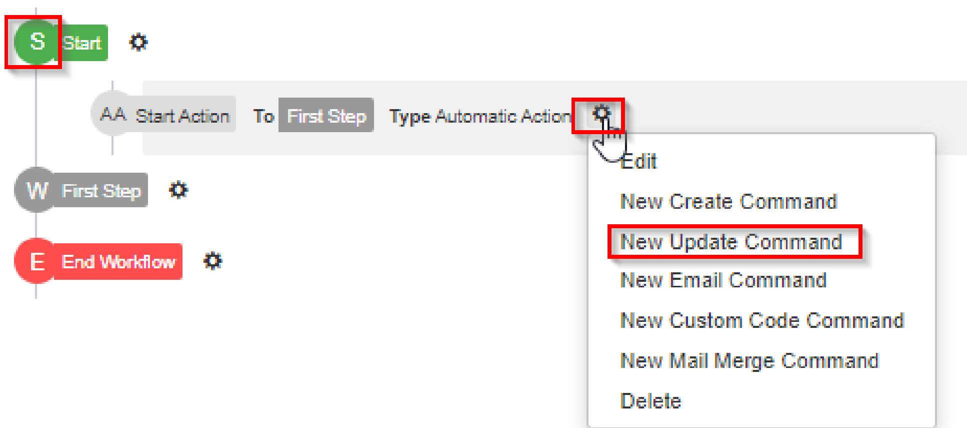
Status: Active

On Item Creation Run This Workflow?: False (We will mark this as True later on).

Note: When building a workflow, do not mark On Object Create Run This Workflow? As true, until you've finished building your workflow and have tested it thoroughly, especially if your workflow sends out emails.

Now that we have a workflow created lets add an update command so when a bill is created it gets set to the status of pre-bill.

- Click 'S' on the Start Node to reveal the AA Start Action. Once revealed click on the cogwheel to create a new update command.



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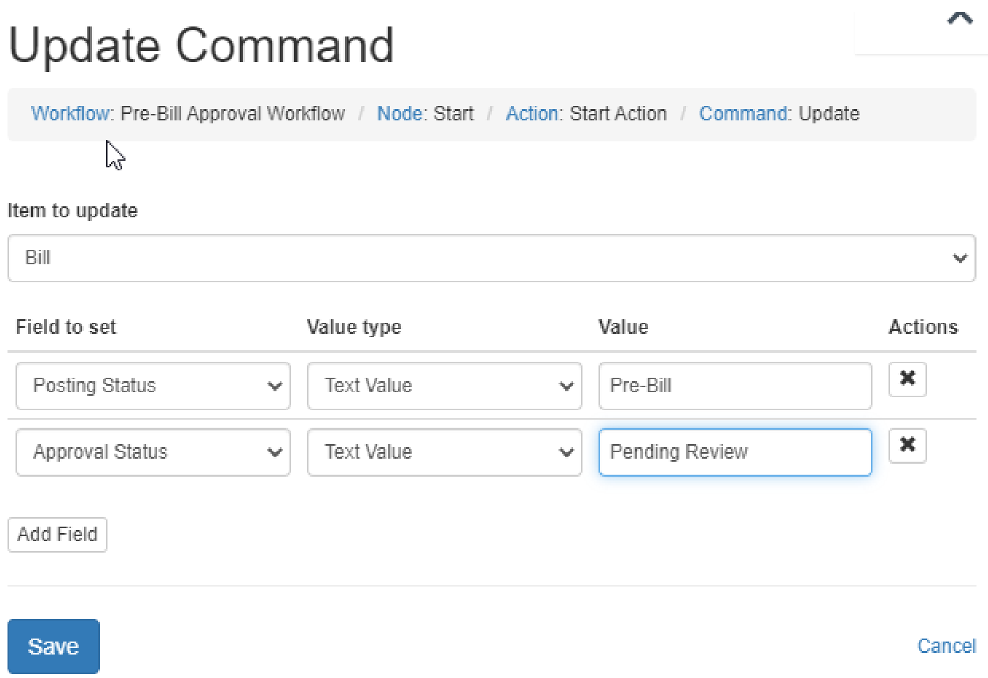
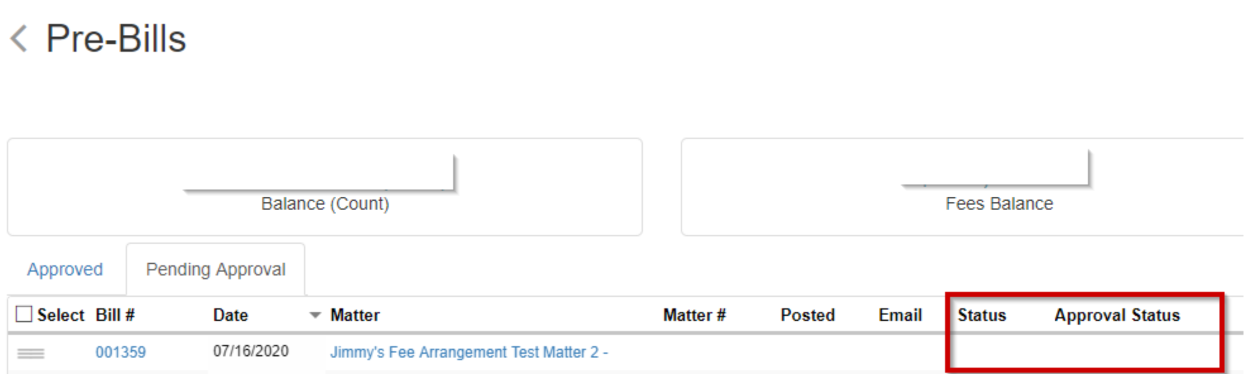
Note: Clicking on the letter next to the name of a Node, will reveal the Actions related to that Node (example: The S next to Start). Clicking on the name of the Node will reveal the Edit Node options (example: The words First Step next to the W).

- Create the Update Command with the following information and click Save.



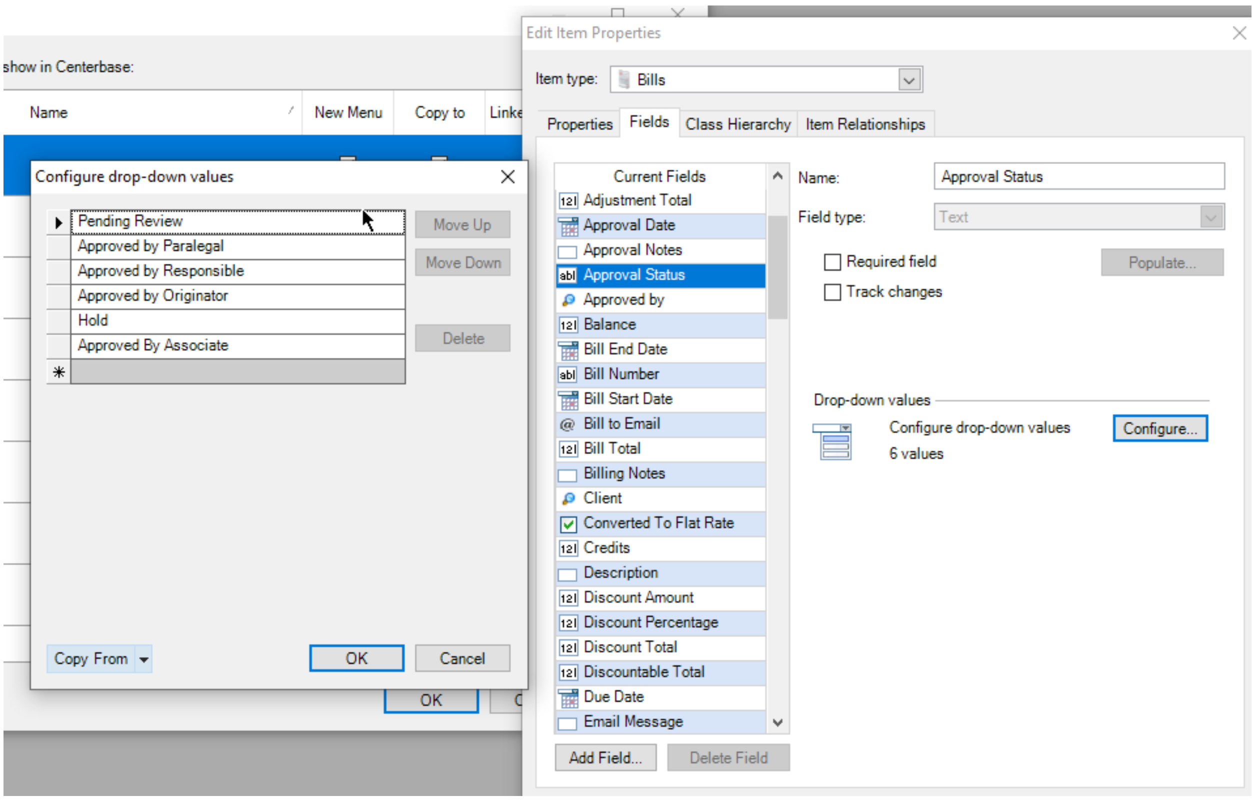
We added this update command as this comes standard with our default bill workflow without it your pre-bills would like the image below on your pre-bill list when generated.



Before we continue creating our workflow, we will start by making sure we have all the fields we will need.

- Open your **Windows Administrative Tool**. If you do not have it on your computer, navigate to:
  - www.support.centerbase.com
  - Click on the **Downloads** icon

- Then click the section:
  - "Windows Administrative Tool Downloads"
- Once you log in, navigate to the **Admin** ribbon, and click on the **Item Manager.**
- Double click on the following Item Types and make sure you have the corresponding non-system field values
  - **Bills**
    - Approval Status
      - Approved by Paralegal
      - Approved by Responsible



Note: You can name the status anything you would like this is usually used so that users can understand what stage the pre-bill is at in the workflow, we will be adding these commands in our next few steps

Now that we have all the fields we will need in our workflow, we will begin configuring the Nodes, Actions and Commands needed for Pre-Bill Approval.

Navigate back to your Pre-Bill Approval Workflow and look at your **Wait** Node titled *First Step*. Click on the word ***First Step*** if you would like to rename it. For this workshop we will leave it as it is.

Now we will create some additional Nodes the first will be an additional **Wait** Node titled *Second Step.* This wait node will house the second User Action associated with the Pre-Bill Approval process. The second node we will create is an End Node.

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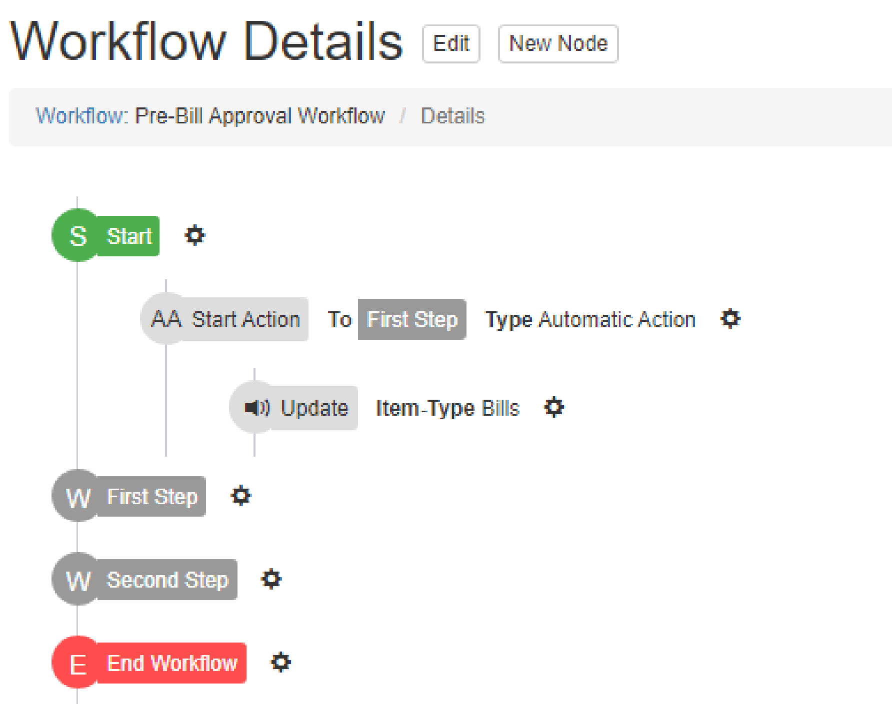
- Click on **New Node** next to Workflow Details:
  - **Second Step**
    - **Type:** Wait
    - **Name:** Second Step
  - **End Workflow**
    - **Type:** End
    - **Name:** End Workflow

Your Pre-Bill Approval Workflow should now look like this:

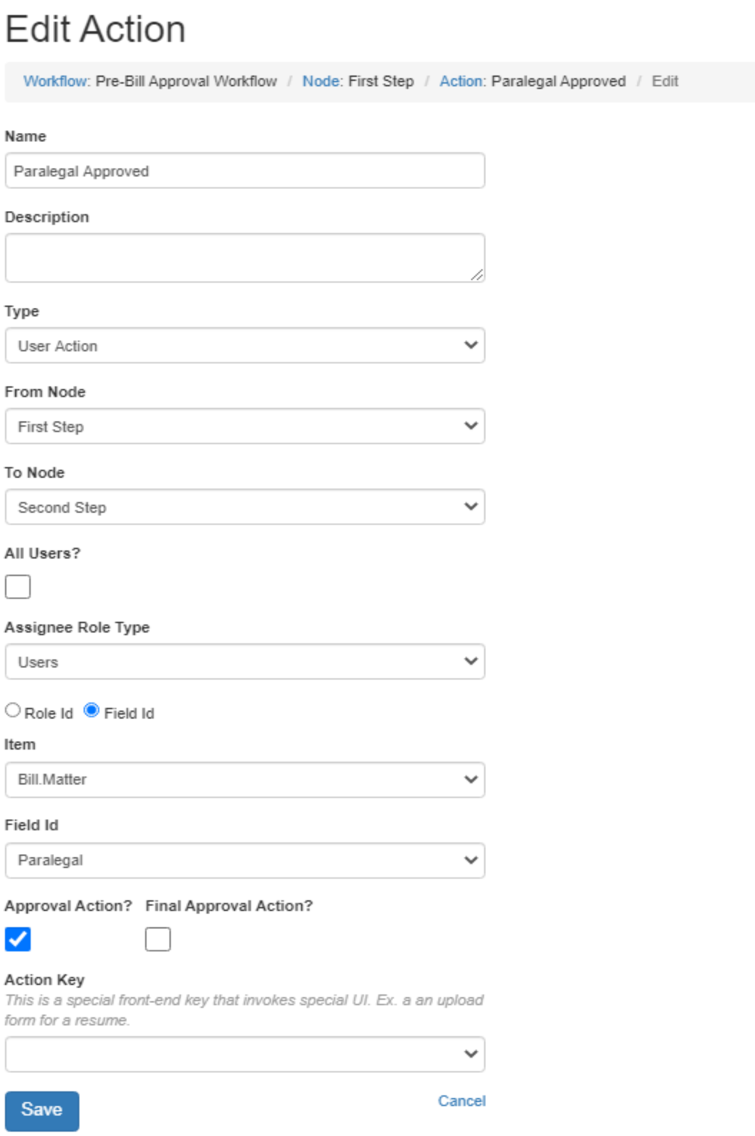


Next, we will create one **User Action** for both of our **Wait** nodes *First Step* and *Second Step*.

Note: The name of the User Action will be what the button is named on the ePre-Bill Approval Page

- Click on the **Gear** next to the **First Step** Wait Node and select **New Action**.
  - **Paralegal Approved**
    - **Name:** Paralegal Approved
    - **Description:** (Optional)
    - **Type:** User Action
    - **From Node:** First Step
    - **To Node:** Second Step
    - **All Users?**: False (Unchecked)
    - **Assignee Role Type:** Users

- **Role ID or Field ID:** Field Id
- **Item:** Bill.Matter
- **Field ID:** Paralegal
- **Approval Action?:** True (Checked)
- **Final Approval Action?:** False (Unchecked)

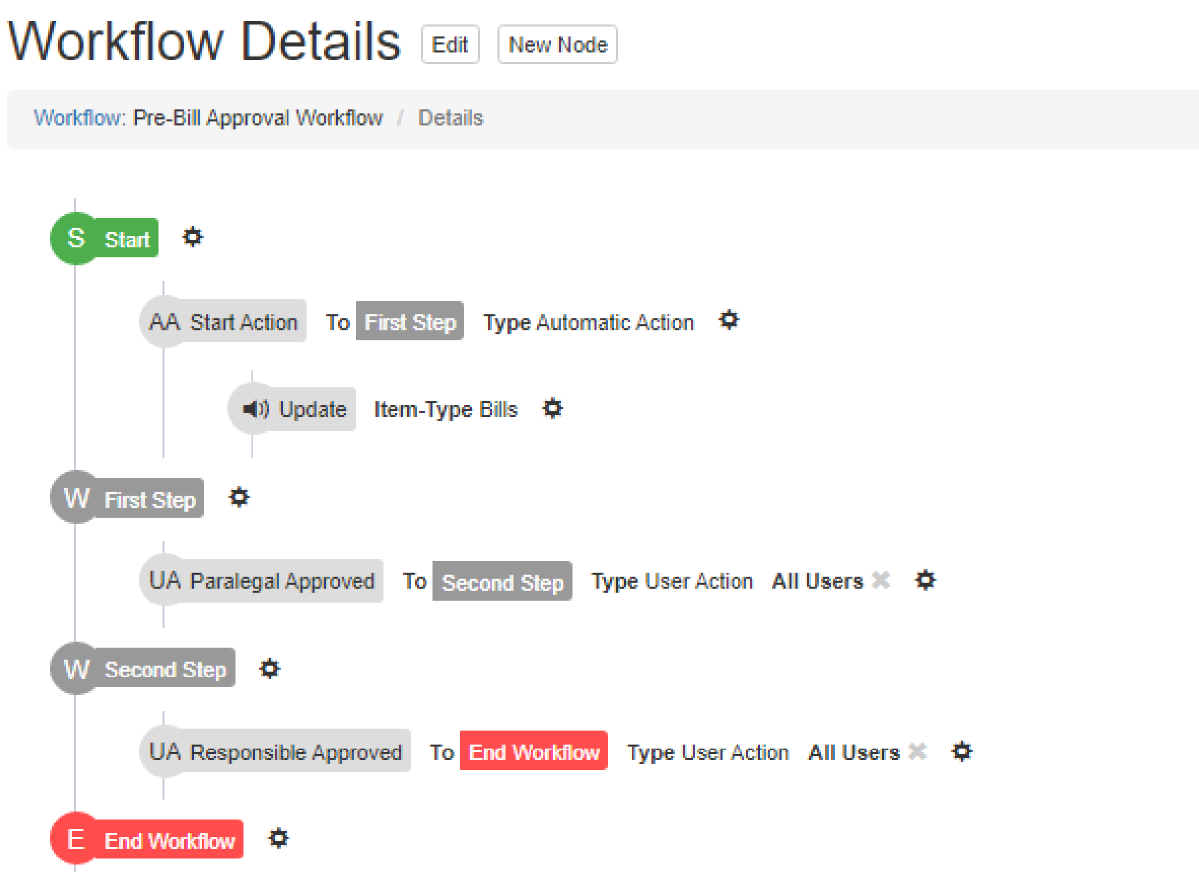


Note: If you do not have the Approval Actions under Field ID, you will need a Centerbase Representative to enable your site for ePre-Bill Approval. Once enabled you should have the option for Approval Action and Final Approval Action available.

- **Responsible Approved**
  - **Name:** Responsible Approved

- **Description:** (Optional)
- **Type:** User Action
- **From Node:** Second Step
- **To Node:** End Workflow
- **All Users?**: False (Unchecked)
- **Assignee Role Type:** Users
- **Role ID or Field ID:** Field Id
- **Item:** Bill.Matter
- **Field ID:** Responsible Attorney
- **Approval Action?:** False (Unchecked)
- **Final Approval Action?:** True (Checked)

Your workflow should now look similar to the image shown below.



Next, we will add an **Update** command to the previously created **User Actions** to update the following Bill fields: Approval By, Approval Date, Approval Status

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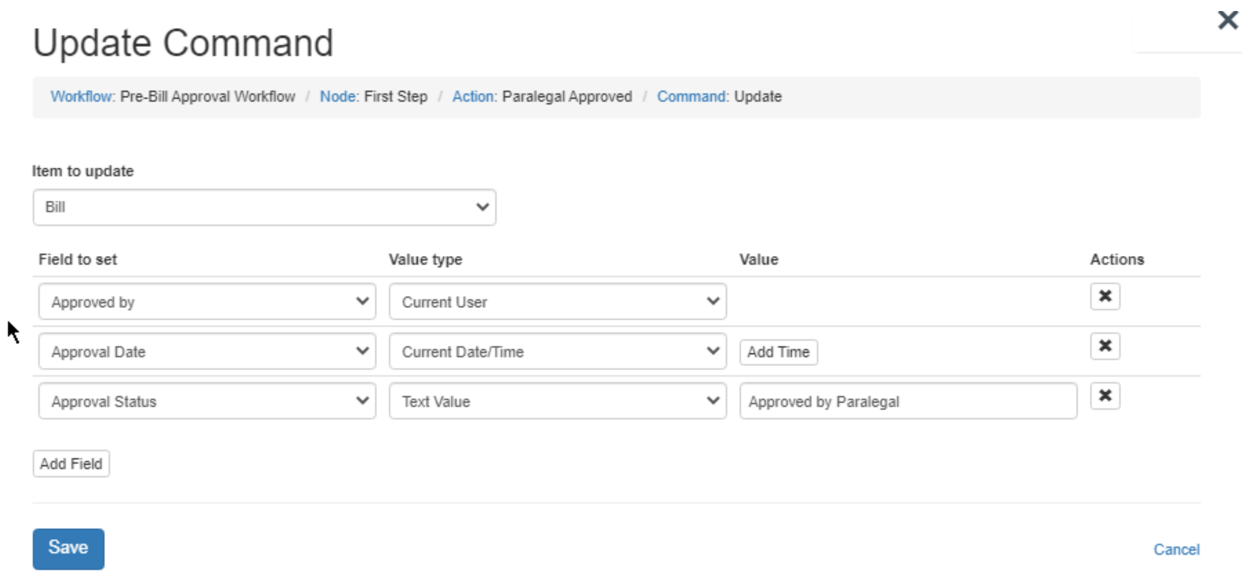
- Click on the **Gear** next to the **Paralegal Approval** User Action and select **New Update Command**.
  - **Items to update:** Bill
  - **Field to set:** Approval By || **Value Type:** Current User
  - **Field to set:** Approval Date || **Value Type:** Current Date/Time
  - **Field to set:** Approval Status || **Value Type:** Text Value || **Value:** Approved by Paralegal



- Click on the **Gear** next to the **Responsible Approval** User Action and select **New Update Command**.
  - **Items to update:** Bill
  - **Field to set:** Approval By || **Value Type:** Current User
  - **Field to set:** Approval Date || **Value Type:** Current Date/Time
  - **Field to set:** Approval Status || **Value Type:** Text Value || **Value:** Approved by Responsible

We have now completed our Pre-Bill Approval Workflow. Now you can begin the fun part of testing the workflow to make sure it works correctly. Once you have fully tested the workflow, you can set **On Object Creation Run This Workflow?** In your workflow options as **True** and you are all set for ePre-Bill Approval.

Note: ePre-Bill Approval requires bill template changes to work. So, if you try to test it and your Pre-Bills do not load make sure you are using a template that has already been edited to allow ePre-Bill. If you have no template available, you can always use the default InvoiceLegal bill template.