

There are 17 steps to complete this task:

1. **Open System Management.**
2. **Select the Admin tab and enter the Admin Password.**
3. **Select Workflow Management Profile.**
4. **Select the Document Activity.**
5. **Choose the Module for this Workflow.**
6. **Drag the appropriate Activities to the Selected Activities list.**
7. **Press Add Profiles icon.**
8. **Select the Module and Profile.**
9. **Press Add Parameters icon.**
10. **Select the Module and Profile.**
11. **Enter the Workflow steps.**
12. **Close the Document Approval Step Maintenance window.**
13. **Close the Workflow Profile Maintenance window.**
14. **Save the Profile.**
15. **Close the Workflow Profiles window.**
16. **Close the System Management window.**
17. **Confirm the document template has the necessary custom properties.**

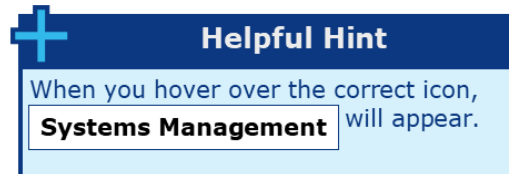
Standard Guide

Step 1. Open System Management.

There are 2 ways to open this module.

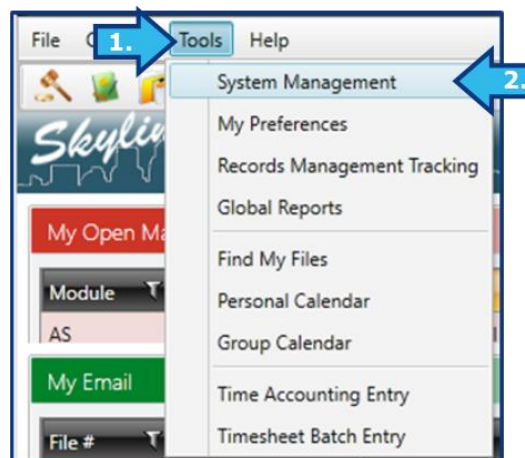
1-Step Option:

Press the **System Management** icon on the **Global Toolbar**.



2-Step Option:

1. On the **Menu Bar**, press **Tools**.
2. Press **System Management**.



Step 2. Select the Admin tab and enter the Admin Password.

System Administrator privileges are required to create or edit workflow automations. Select the **Admin** tab and enter the password to access **Admin** options.



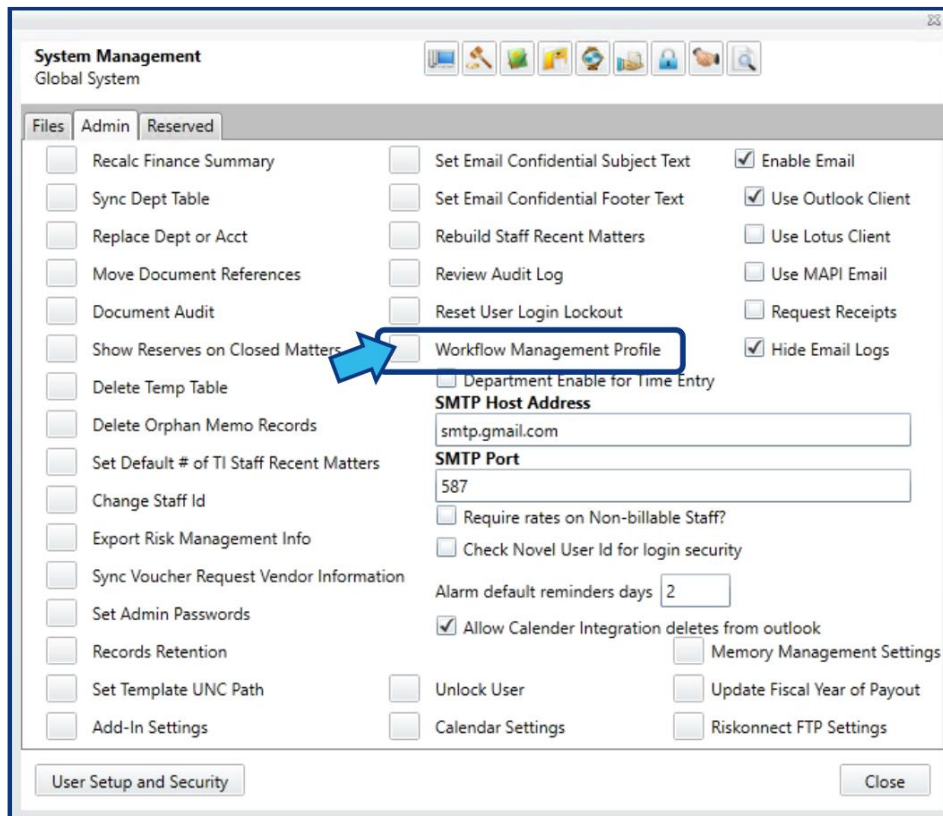
System Management
Global System

Files Admin Reserved

Admin Password Login

Step 3. Select Workflow Management Profile.

Select the box to the left of **Workflow Management Profile**, located near the middle of the **Admin** options.



System Management
Global System

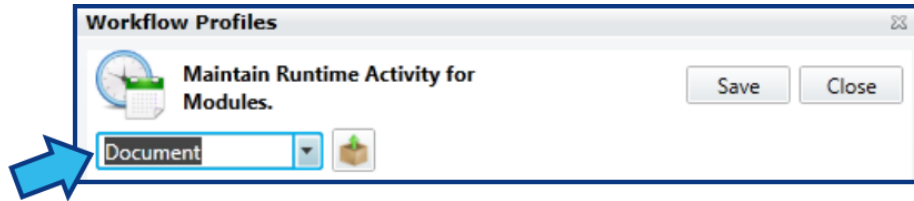
Files Admin Reserved

<input type="checkbox"/> Recalc Finance Summary	<input type="checkbox"/> Set Email Confidential Subject Text	<input checked="" type="checkbox"/> Enable Email
<input type="checkbox"/> Sync Dept Table	<input type="checkbox"/> Set Email Confidential Footer Text	<input checked="" type="checkbox"/> Use Outlook Client
<input type="checkbox"/> Replace Dept or Acct	<input type="checkbox"/> Rebuild Staff Recent Matters	<input type="checkbox"/> Use Lotus Client
<input type="checkbox"/> Move Document References	<input type="checkbox"/> Review Audit Log	<input type="checkbox"/> Use MAPI Email
<input type="checkbox"/> Document Audit	<input type="checkbox"/> Reset User Login Lockout	<input type="checkbox"/> Request Receipts
<input type="checkbox"/> Show Reserves on Closed Matters	<input type="checkbox"/> Workflow Management Profile	<input checked="" type="checkbox"/> Hide Email Logs
<input type="checkbox"/> Delete Temp Table	<input type="checkbox"/> Department Enable for Time Entry	
<input type="checkbox"/> Delete Orphan Memo Records	SMTP Host Address	
<input type="checkbox"/> Set Default # of TI Staff Recent Matters	<input type="text" value="smtp.gmail.com"/>	
<input type="checkbox"/> Change Staff Id	SMTP Port	
<input type="checkbox"/> Export Risk Management Info	<input type="text" value="587"/>	
<input type="checkbox"/> Sync Voucher Request Vendor Information	<input type="checkbox"/> Require rates on Non-billable Staff?	
<input type="checkbox"/> Set Admin Passwords	<input type="checkbox"/> Check Novel User Id for login security	
<input type="checkbox"/> Records Retention	Alarm default reminders days <input type="text" value="2"/>	
<input type="checkbox"/> Set Template UNC Path	<input checked="" type="checkbox"/> Allow Calendar Integration deletes from outlook	<input type="checkbox"/> Memory Management Settings
<input type="checkbox"/> Add-In Settings	<input type="checkbox"/> Unlock User	<input type="checkbox"/> Update Fiscal Year of Payout
	<input type="checkbox"/> Calendar Settings	<input type="checkbox"/> Riskconnect FTP Settings

User Setup and Security Close

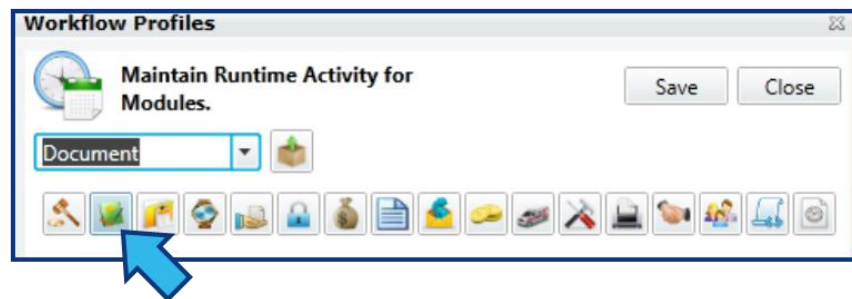
Step 4. Select the Document Activity.

In the **Runtime Activity** drop-down, select the **Document** activity.



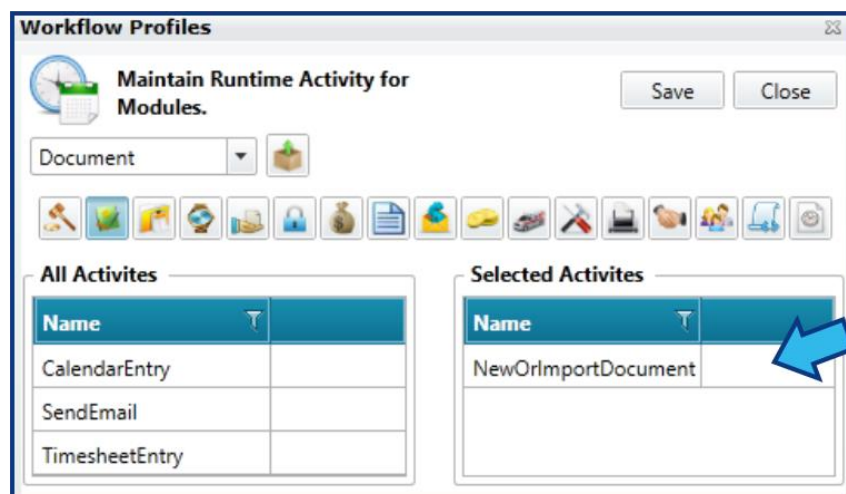
Step 5. Choose the Module for this Workflow.

Once a **Runtime Activity** is selected, module icons will appear. Choose the appropriate icon for the new matter type to which this **Document Workflow** will be associated. The **Assignment** module is selected for this example.



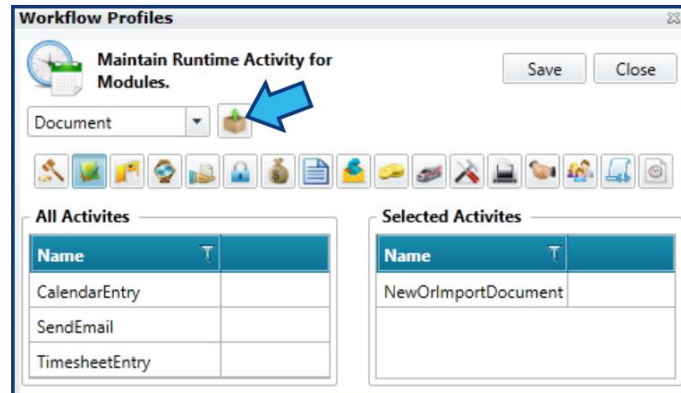
Step 6. Drag the appropriate Activities to the Selected Activities list.

Once a module is selected, two lists appear. On the left is a listing of **All Activities** which can be automated. On the right are the **Selected Activities**. Drag the **NewOrImportDocument** activity to the **Selected Activities** list.



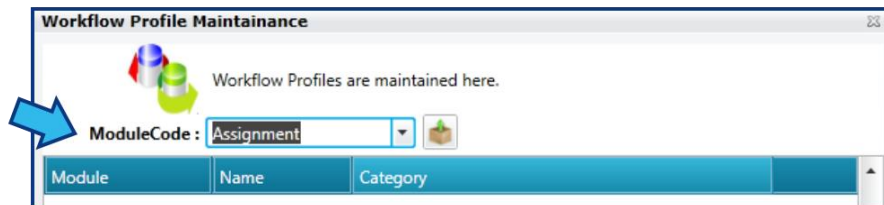
Step 7. Press Add Profiles icon.

The **Add Profiles** icon is located beside the **Runtime Activity** drop-down.

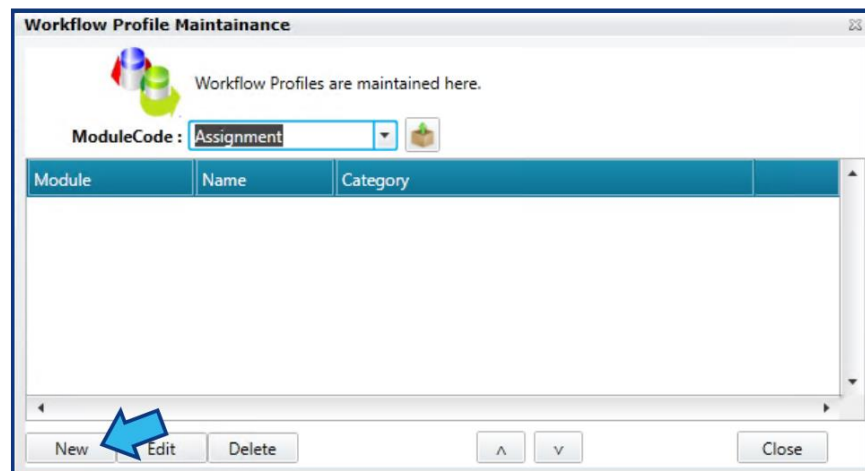


Step 8. Select the Module and Profile.

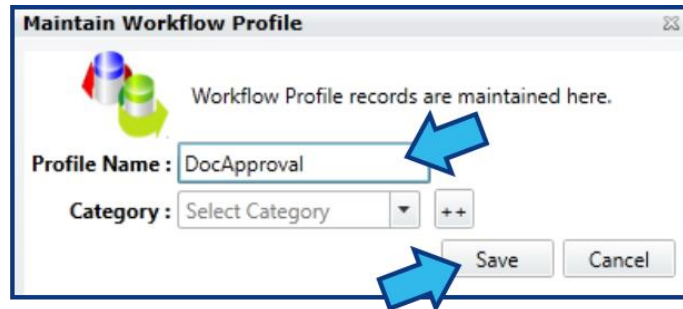
After completing **Step 7**, a **Workflow Profile Maintenance** window appears. In the **ModuleCode** drop-down, select the module. This should be the same module selected in **Step 5**. The **Assignment** module is selected for this example.



A list of available profiles will appear in the table. Select the appropriate profile or create a new one by pressing **New** in the bottom-left corner.

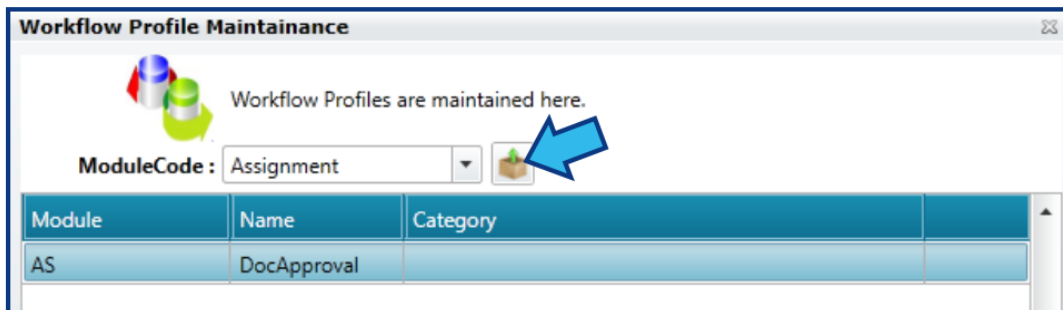


In the **Maintain Workflow Profile** window, provide a **Profile Name** and, if applicable, a **Category**. Press **Save**.



Step 9. Press Add Parameters icon.

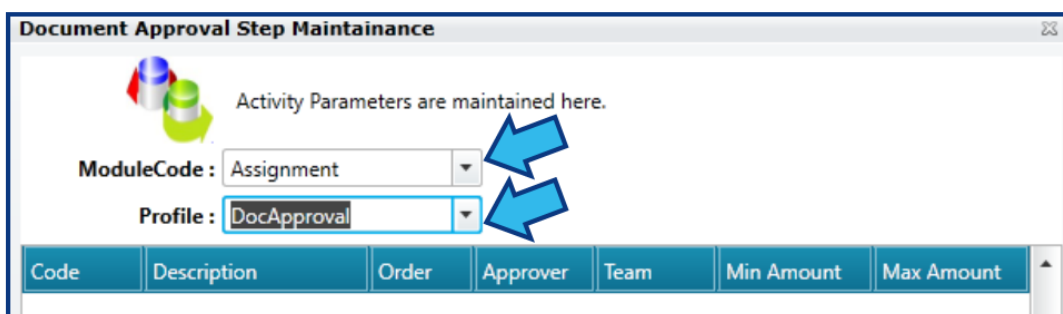
Press the **Add Parameters** icon located to the right of the **ModuleCode** field.



Module	Name	Category
AS	DocApproval	

Step 10. Select the Module and Profile.

In the **ModuleCode** and **Profile** drop-downs, select the **Module** and **Profile** from **Step 8**.

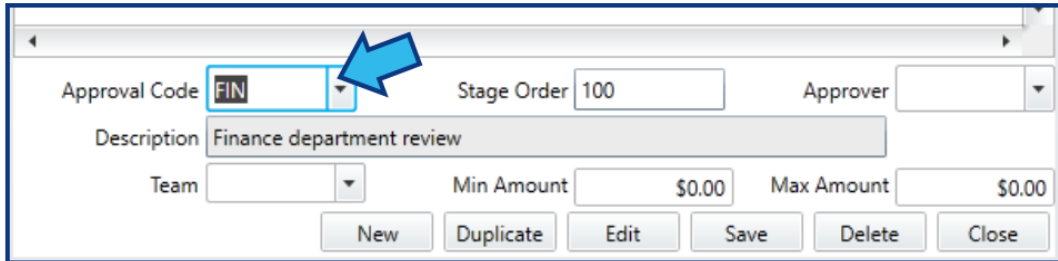


Code	Description	Order	Approver	Team	Min Amount	Max Amount
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Step 11. Enter the Workflow steps.

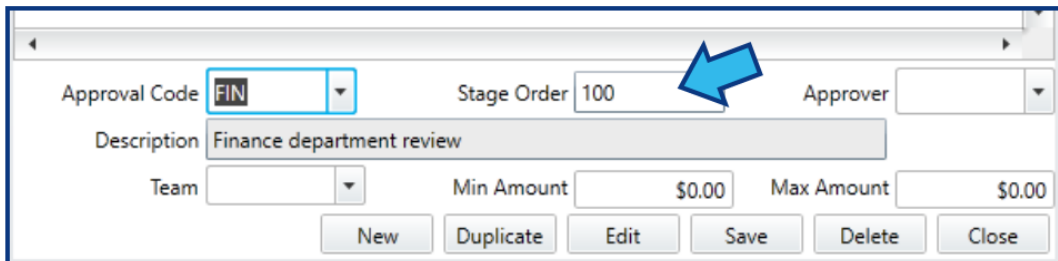
For each step, do the following:

Select an **Approval Code** for the step. This is the type of approval represented by this step. The **Description** field will display the approval type once an **Approval Code** is selected.



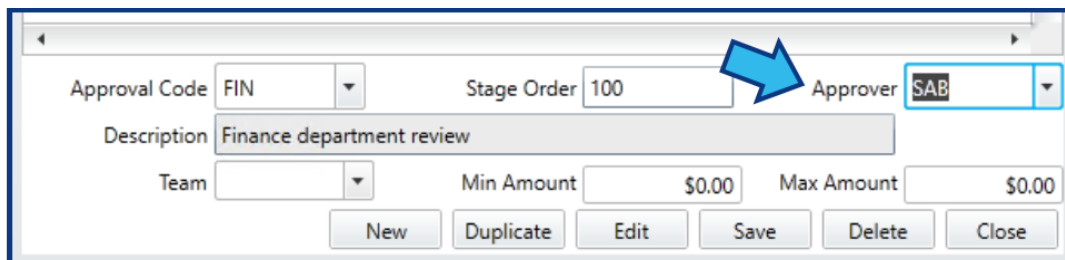
A screenshot of a web form for creating a workflow step. The 'Approval Code' dropdown menu is open, showing 'FIN' selected. A blue arrow points to this dropdown. Other fields include 'Stage Order' (100), 'Approver' (empty), 'Description' (Finance department review), 'Team' (empty), 'Min Amount' (\$0.00), and 'Max Amount' (\$0.00). Buttons for 'New', 'Duplicate', 'Edit', 'Save', 'Delete', and 'Close' are at the bottom.

The **Stage Order** is pre-populated. However, this can be changed to suit the purposes of the **Workflow**.



A screenshot of the same web form. The 'Stage Order' field, which contains the value '100', is highlighted with a blue box and a blue arrow pointing to it. All other fields and buttons remain the same as in the previous screenshot.

Select an **Approver**. This is the individual responsible for giving approval for this step. This person must have a valid email address in their contact information in **CLW** in order to receive automatic email notifications that they have pending approvals.

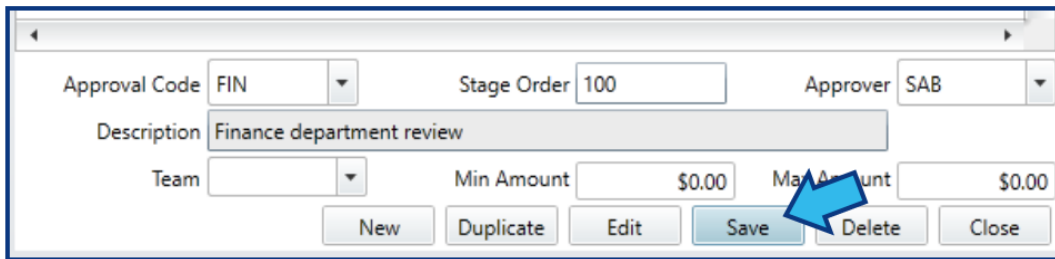


A screenshot of the web form. The 'Approver' dropdown menu is open, showing 'SAB' selected. A blue arrow points to this dropdown. All other fields and buttons remain the same as in the previous screenshots.

Selecting a **Team** is optional. If multiple teams exist in the organization, each team can have its approvers assigned.

Min and **Max Amount** can be applied for steps that are only necessary when certain conditions apply. For example, if an extra financial approval is required for a document related to a matter valued at over \$10,000, that step would need \$10,000 entered in the **Min Amount** and a cap value entered for **Max Amount**. The **Max Amount** must be higher than the **Min Amount**. NOTE: If **Min** and **Max Amount** are used, the associated document template must contain the **IsExpWitnessAmount** custom property.

Once the step details have been selected and/or entered, press **Save**.



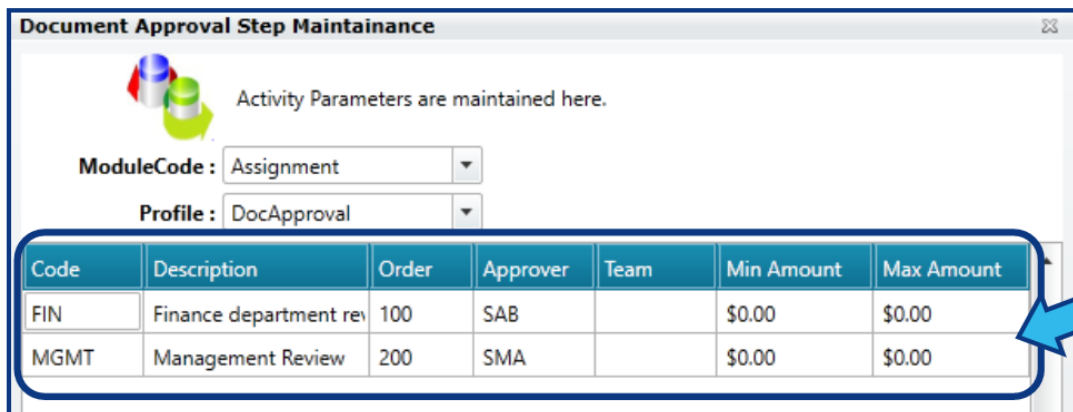
Approval Code: FIN Stage Order: 100 Approver: SAB

Description: Finance department review

Team: Min Amount: \$0.00 Max Amount: \$0.00

Buttons: New, Duplicate, Edit, **Save**, Delete, Close

All saved steps will appear in the step list.



Document Approval Step Maintenance

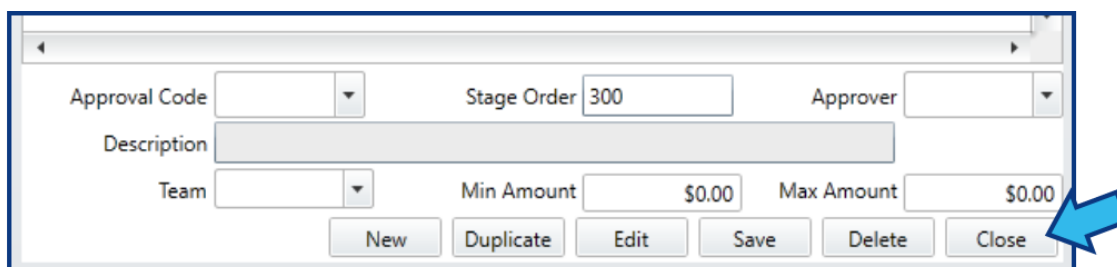
Activity Parameters are maintained here.

ModuleCode: Assignment Profile: DocApproval

Code	Description	Order	Approver	Team	Min Amount	Max Amount
FIN	Finance department review	100	SAB		\$0.00	\$0.00
MGMT	Management Review	200	SMA		\$0.00	\$0.00

Step 12. Close the Document Approval Step Maintenance window.

Once all steps have been added successfully, press **Close** in the bottom-right corner to close the **Document Approval Step Maintenance** window.



Approval Code: Stage Order: 300 Approver: Description: Team: Min Amount: \$0.00 Max Amount: \$0.00

Buttons: New, Duplicate, Edit, Save, Delete, **Close**

Step 13. Close the Workflow Profile Maintenance window.

Press the **Close** button located in the bottom-right corner of the **Workflow Profile Maintenance** window.



Buttons: New, Edit, Delete, ^, v, **Close**

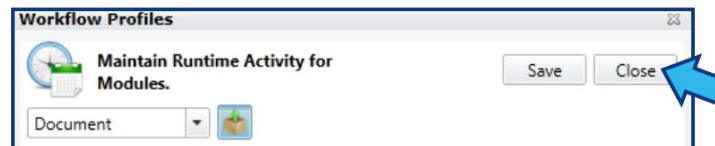
Step 14. Save the Profile.

Save the **Profile** by pressing **Save** near the top-right corner of the **Workflow Profiles** window.



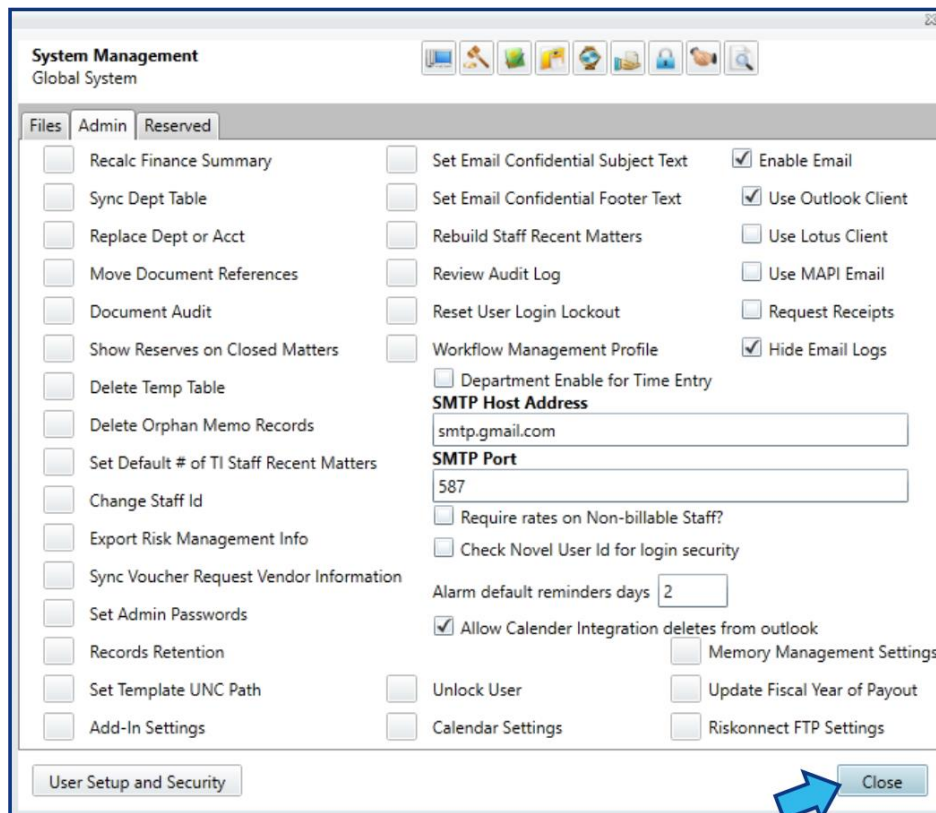
Step 15. Close the Workflow Profiles window.

Press the **Close** button in the top-right corner of the **Workflow Profiles** window.



Step 16. Close the System Management window.

Press the **Close** button in the lower-right corner of the **System Management** window.



Step 17. Confirm the document template has the necessary custom properties.

Refer to the article, [Setup Template for Document Workflow](#), for instructions to confirm the document template for this **Workflow** has the necessary custom properties applied.