



There are 20 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 New Activity type.
5. Choose the Module for the type of matter.
6. Drag CalendarEntry to the Selected Activities list.
7. Press Add Profiles icon.
8. Select the Module.
9. Press New.
10. Enter a Profile Name and a Category (if applicable).
11. Press Save.
12. Press Add Parameters icon.
13. Select the Module and Profile.
14. Add the Parameter(s).
15. Close the Activity Parameter Maintenance window.
16. Close the Workflow Profile Maintenance window.
17. Save the Profile.
18. Close the Workflow Profiles window.
19. Close the System Management window.
20. Confirm the calendar entry is generated as expected by creating a new matter.

Standard Guide

Step 1. Open System Management.

There are two ways to open this module.

1-Step Option:

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

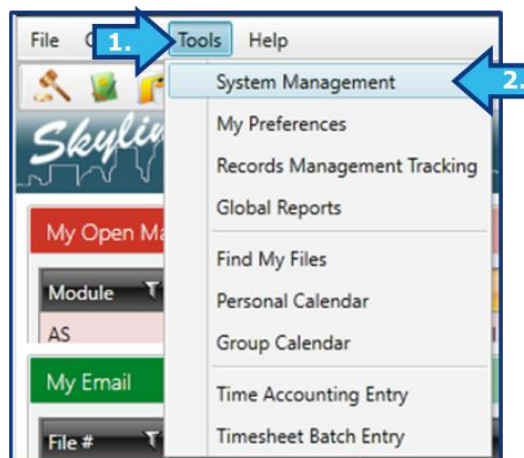


+ **Helpful Hint**

When you hover over the correct icon, **Systems Management** will appear.

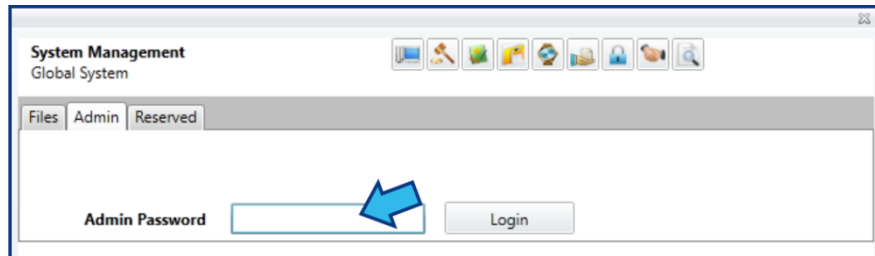
2-Step Option:

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



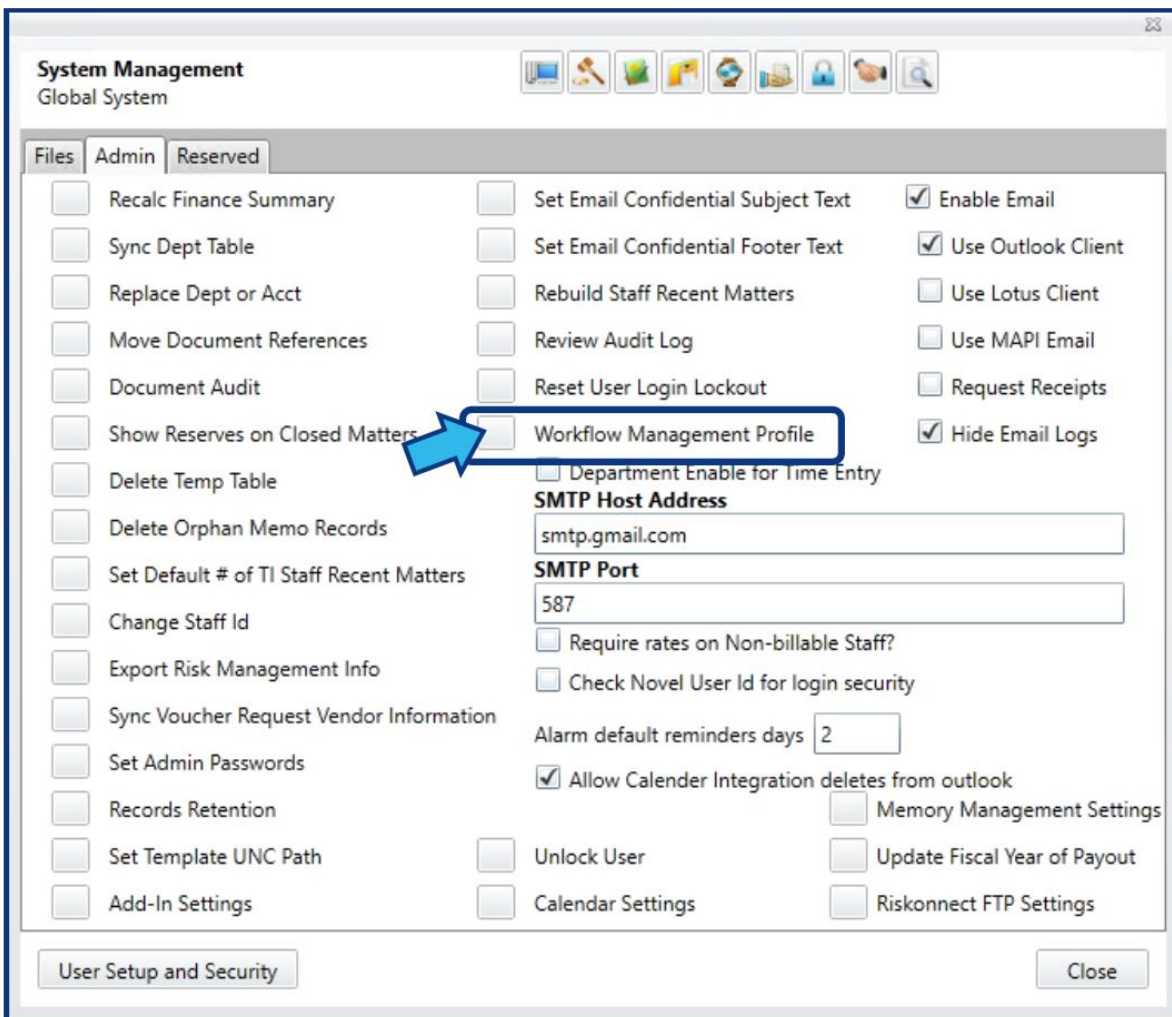
Step 2. Select the Admin tab and enter the Admin Password.

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



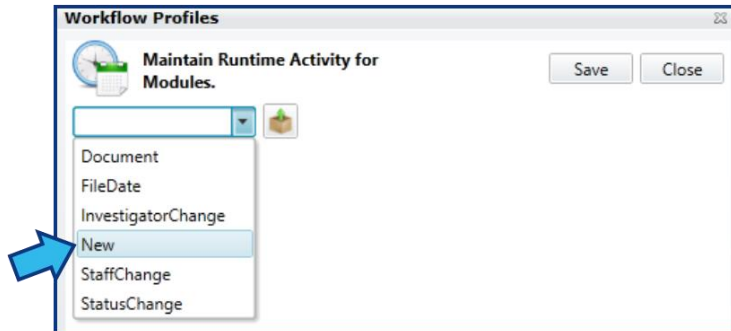
Step 3. Select Workflow Management Profile.

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



Step 4. Select the New Activity type.

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



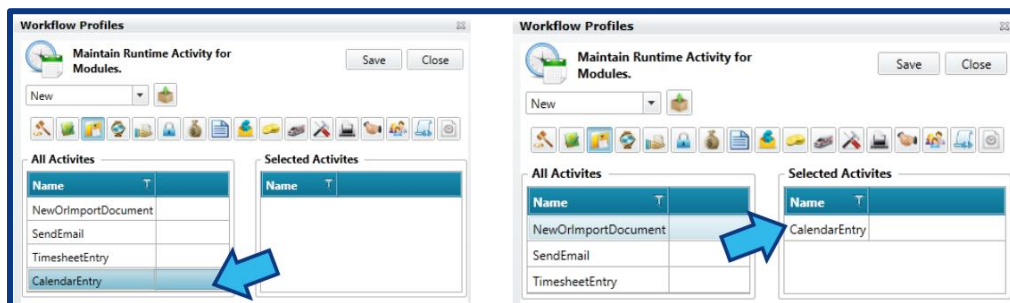
Step 5. Choose the Module for the type of matter.

Once a **Runtime Activity** is selected, module icons will appear. Choose the appropriate icon for the new matter type to which this automated calendar entry will be attached. The **Claims** module is selected for this example.



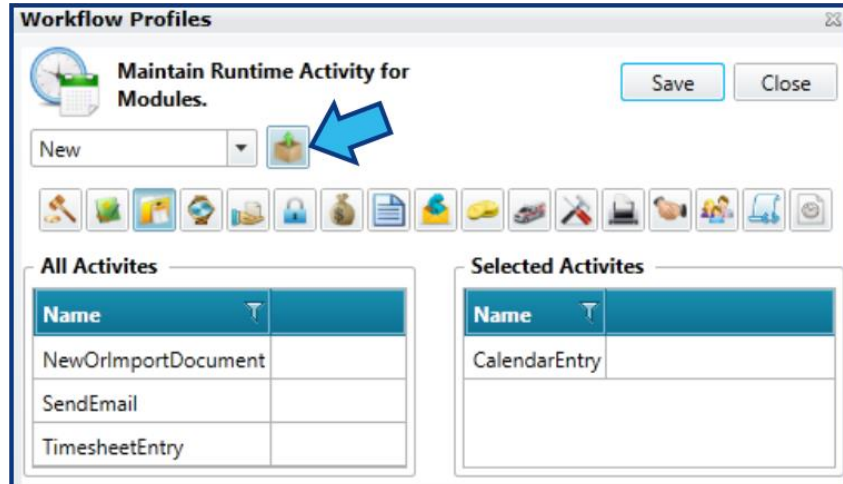
Step 6. Drag CalendarEntry to the Selected Activities list.

Once a module is selected, 2 lists appear. On the left is a listing of **All Activities** which can be automated. On the right are the **Selected Activities**. Drag the **CalendarEntry** activity to the **Selected Activities** list.



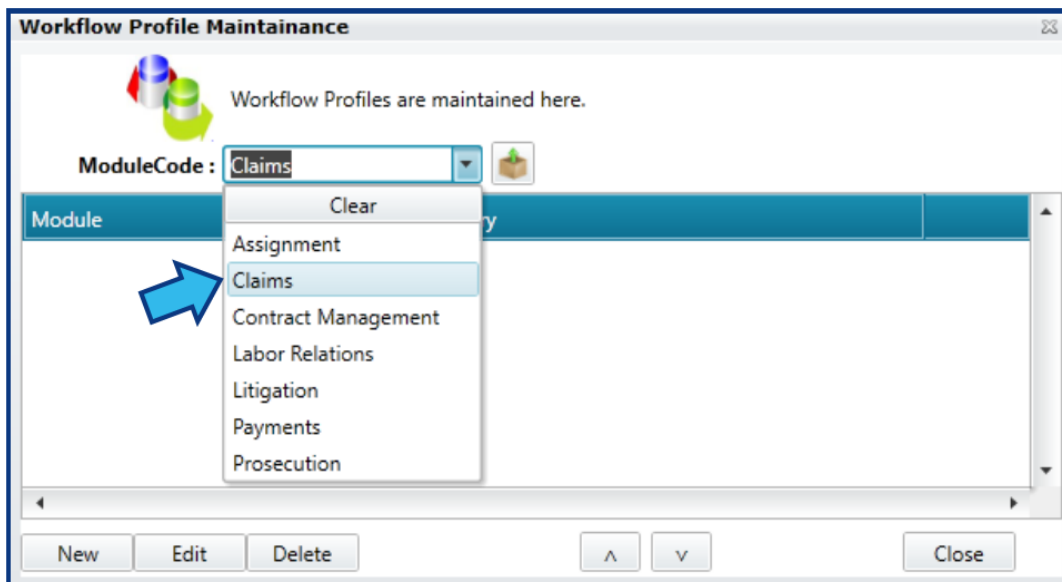
Step 7. Press Add Profiles icon.

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



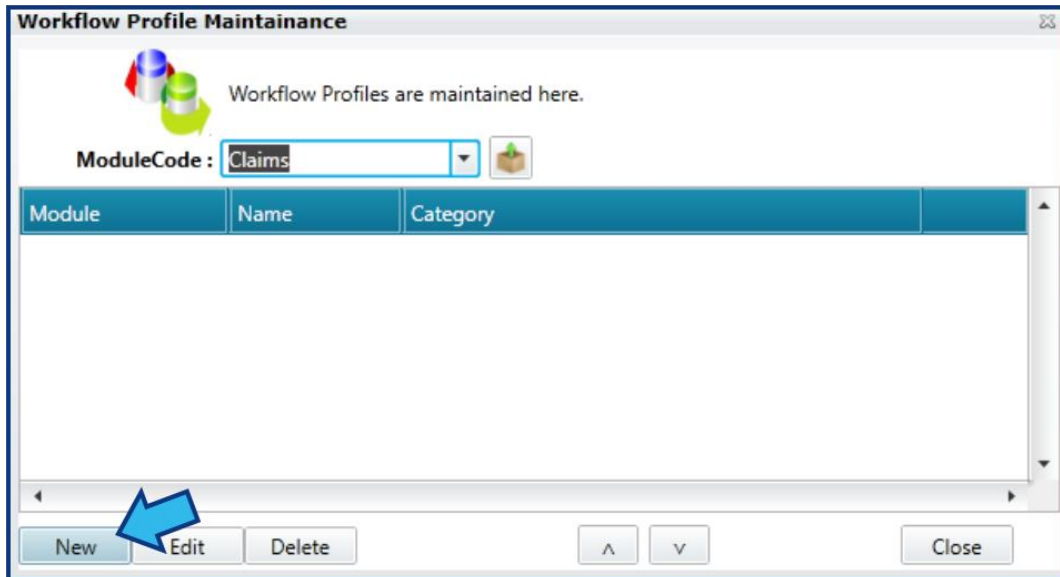
Step 8. Select the Module.

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 **Claims** module is selected for this example.



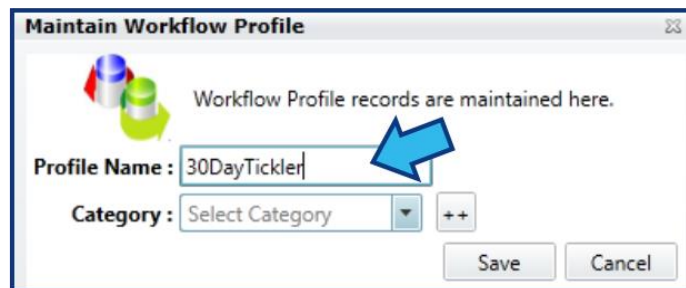
Step 9. Press New.

Create a new **Workflow Profile** by pressing the **New** button located at the bottom-left.



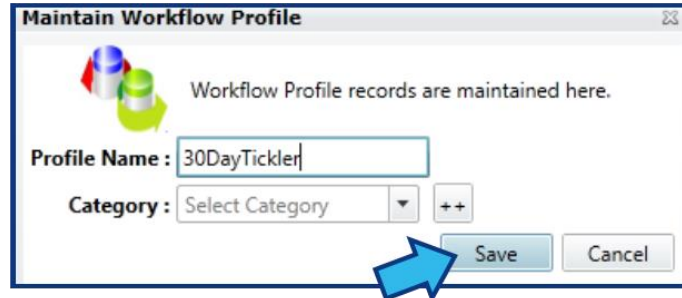
Step 10. Enter a Profile Name and a Category (if applicable).

Provide a **Profile Name**. If the **Profile** is limited to one category type, use the drop-down arrow to select the **Category**. If the **Profile** is limited to two or more category types, use the **++** button to select multiple categories. If the **Profile** is not limited to specific categories, leave the **Category** field empty.



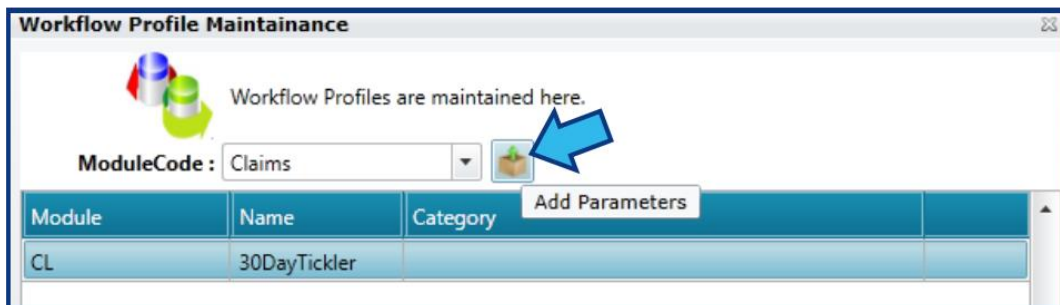
Step 11. Press Save.

The **Save** button is located on the bottom-right.



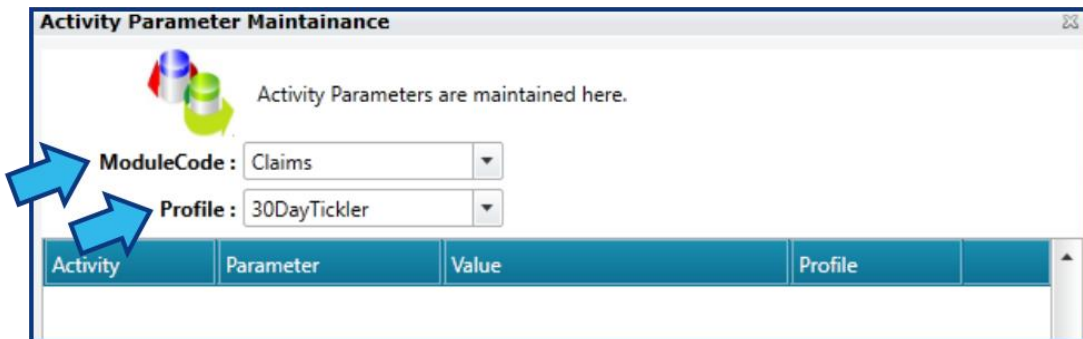
Step 12. Press Add Parameters icon.

The **Profile** just created in **Step 11** will be highlighted. If it is not, highlight the desired **Profile** and press the **Add Parameters** icon located to the right of the **ModuleCode** field.



Step 13. Select the Module and Profile.

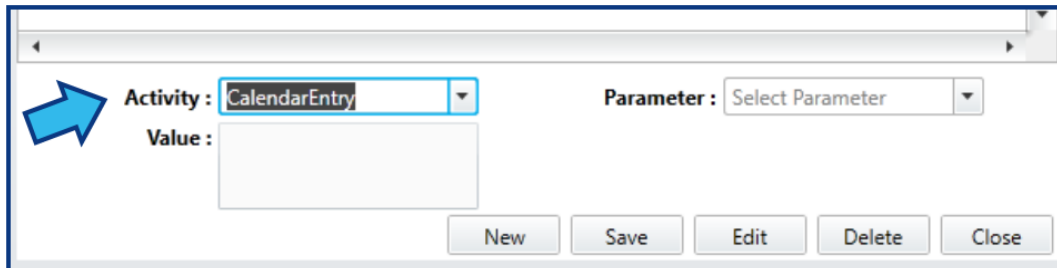
In the **ModuleCode** and **Profile** drop-downs, select the **Module** and **Profile** from **Step 8** and **Step 10**.



Step 14. Add the Parameter(s).

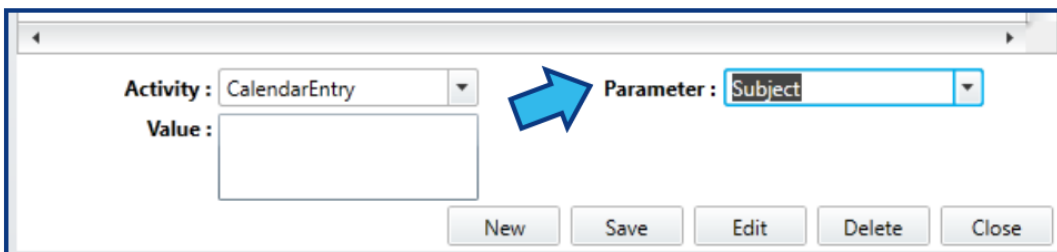
With the **Module** and **Profile** selected, the **Parameters** may be added. For a **Calendar Entry**, there are three required **Parameters: Subject, Number of days, and Class**. To add these **Parameters**, do the following:

In the Activity drop-down, select **CalendarEntry**.



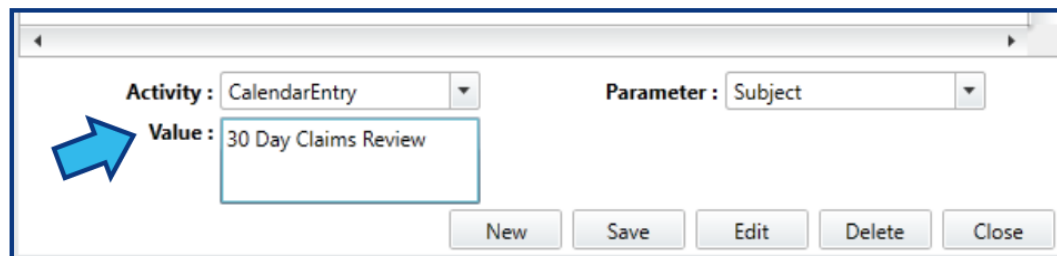
A screenshot of a software window for adding parameters. The 'Activity' dropdown menu is set to 'CalendarEntry', indicated by a blue arrow. The 'Parameter' dropdown menu is currently empty, showing 'Select Parameter'. Below these fields is a 'Value' input box. At the bottom of the window are buttons for 'New', 'Save', 'Edit', 'Delete', and 'Close'.

In the **Parameter** drop-down, select **Subject**.



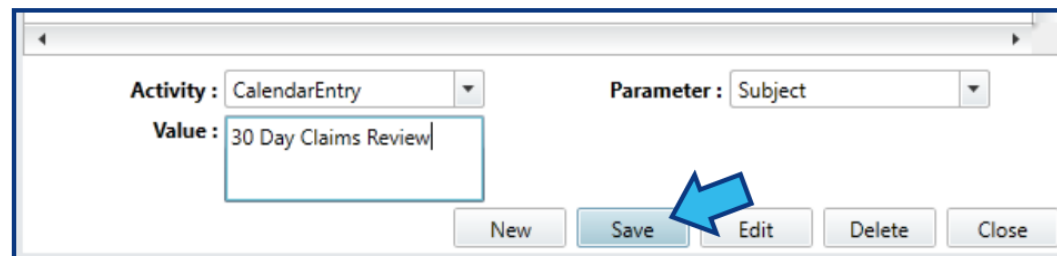
A screenshot of the same software window. The 'Activity' dropdown remains 'CalendarEntry'. The 'Parameter' dropdown menu is now set to 'Subject', indicated by a blue arrow. The 'Value' input box is still empty. The 'New', 'Save', 'Edit', 'Delete', and 'Close' buttons are visible at the bottom.

In the **Value** field, enter the **Subject** to distinguish this calendar entry. The **Subject** should be descriptive to prompt the user of the task required.



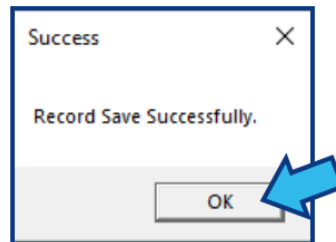
A screenshot of the software window. The 'Activity' dropdown is 'CalendarEntry' and the 'Parameter' dropdown is 'Subject'. The 'Value' input box now contains the text '30 Day Claims Review', indicated by a blue arrow. The 'New', 'Save', 'Edit', 'Delete', and 'Close' buttons are at the bottom.

Press **Save** to add the **Subject Parameter**.

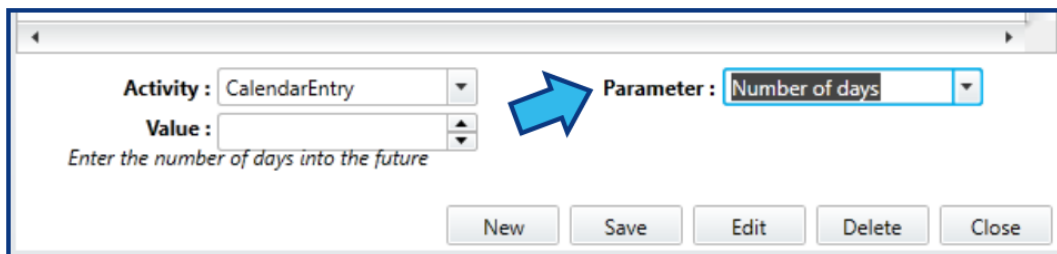


A screenshot of the software window. The 'Activity' dropdown is 'CalendarEntry', the 'Parameter' dropdown is 'Subject', and the 'Value' input box contains '30 Day Claims Review'. A blue arrow points to the 'Save' button at the bottom of the window.

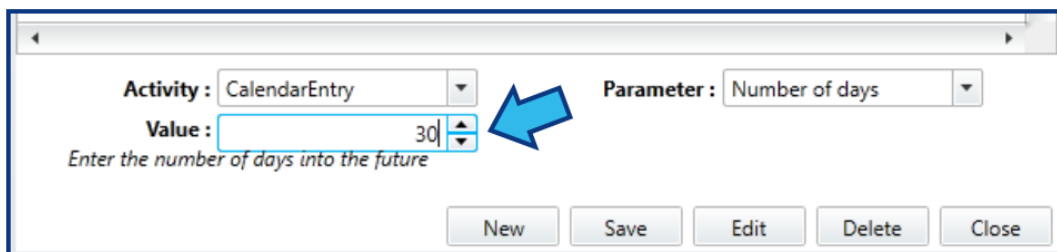
A **Success** dialog box will appear to confirm the **Parameter** has been added to the **Profile**. Press **OK** to continue.



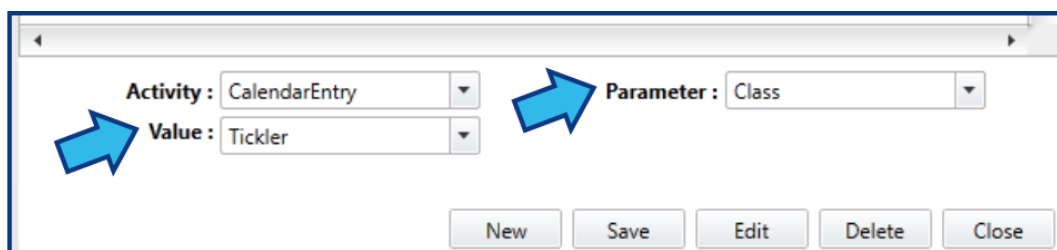
In the **Parameter** drop-down, select **Number of days**.

A dialog box for configuring a calendar entry. It has a title bar with a close button. The "Activity" field is set to "CalendarEntry". The "Value" field is empty, with a small text prompt below it that says "Enter the number of days into the future". The "Parameter" field is a drop-down menu currently showing "Number of days", which is highlighted by a blue arrow. At the bottom are buttons for "New", "Save", "Edit", "Delete", and "Close".

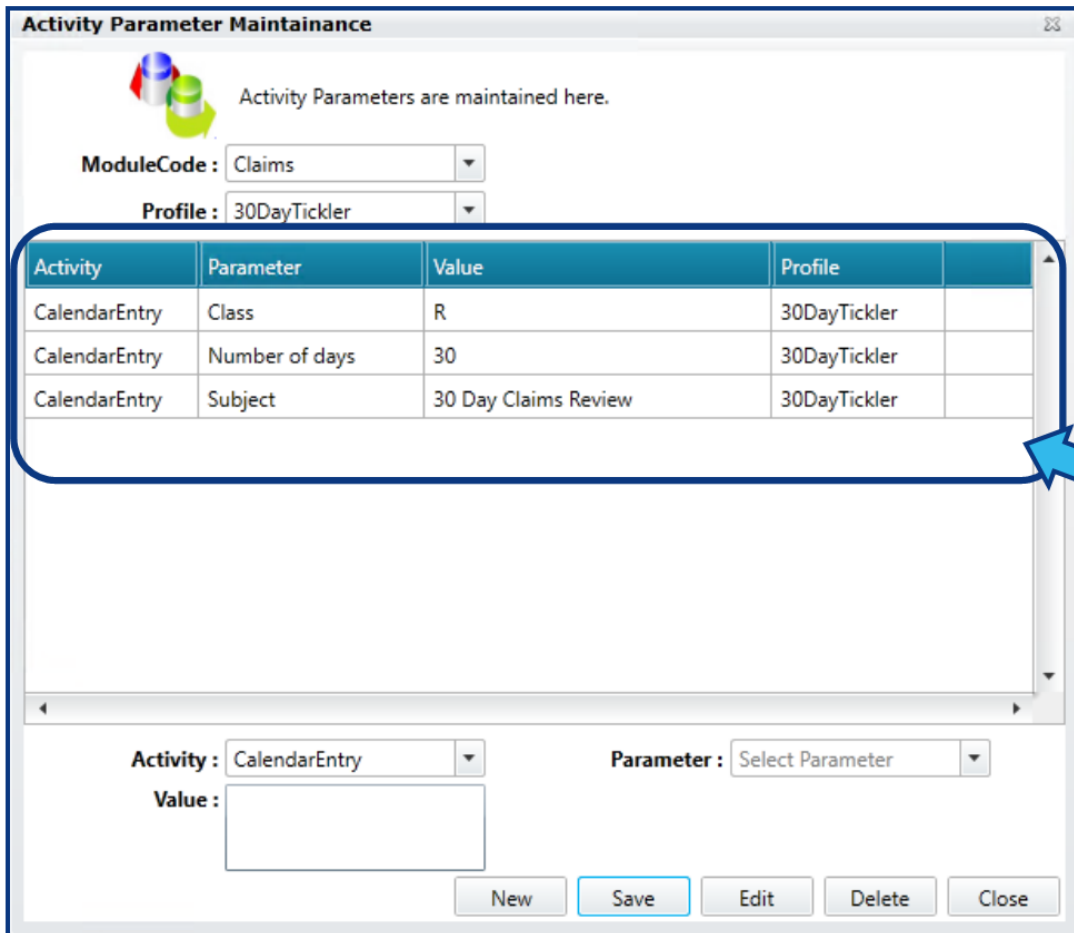
In the **Value** field, enter the number of days in the future this event should be scheduled. This is calculated from the date the new matter is **Opened**.

The same dialog box as above, but now the "Value" field contains the number "30". A blue arrow points to the "Value" field. The "Parameter" field remains "Number of days".

Press **Save** to add the **Parameter** and press **OK** in the **Success** dialog box. Next, in the **Parameter** drop-down, select **Class**. In the **Value** drop-down, select the type of calendar event. In this example, a **Tickler** is chosen.

The dialog box with "Activity" set to "CalendarEntry", "Value" set to "Tickler", and "Parameter" set to "Class". Blue arrows point to the "Value" and "Parameter" fields. The "Save" button is highlighted.

Press **Save** to add the **Parameter** and press **OK** in the **Success** dialog box. Once added, the **Parameters** will be listed on the **Activity Parameter Maintenance** table.



Activity Parameter Maintenance

Activity Parameters are maintained here.

ModuleCode: Claims

Profile: 30DayTickler

Activity	Parameter	Value	Profile
CalendarEntry	Class	R	30DayTickler
CalendarEntry	Number of days	30	30DayTickler
CalendarEntry	Subject	30 Day Claims Review	30DayTickler

Activity: CalendarEntry

Parameter: Select Parameter

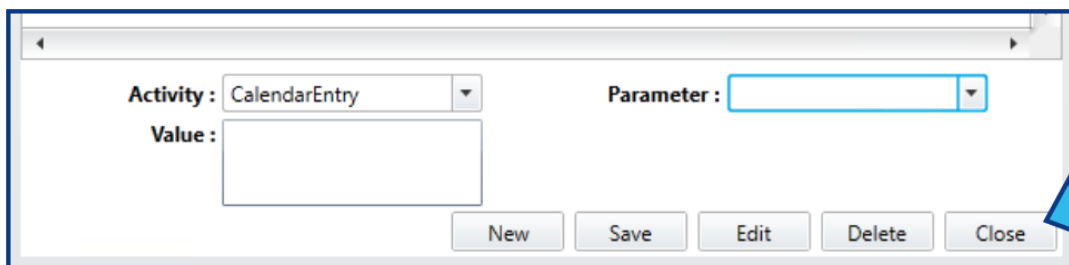
Value:

New Save Edit Delete Close

Additional **CalendarEntry Parameters**, if applicable, may be added in a similar fashion, by selecting the **Parameter**, selecting or entering the **Value**, and then pressing **Save** and **OK**.

Step 15. Close the Activity Parameter Maintenance window.

Once all required and desired optional **Parameters** have been added, press **Close** in the bottom-right corner to close the **Activity Parameter Maintenance** window.



Activity: CalendarEntry

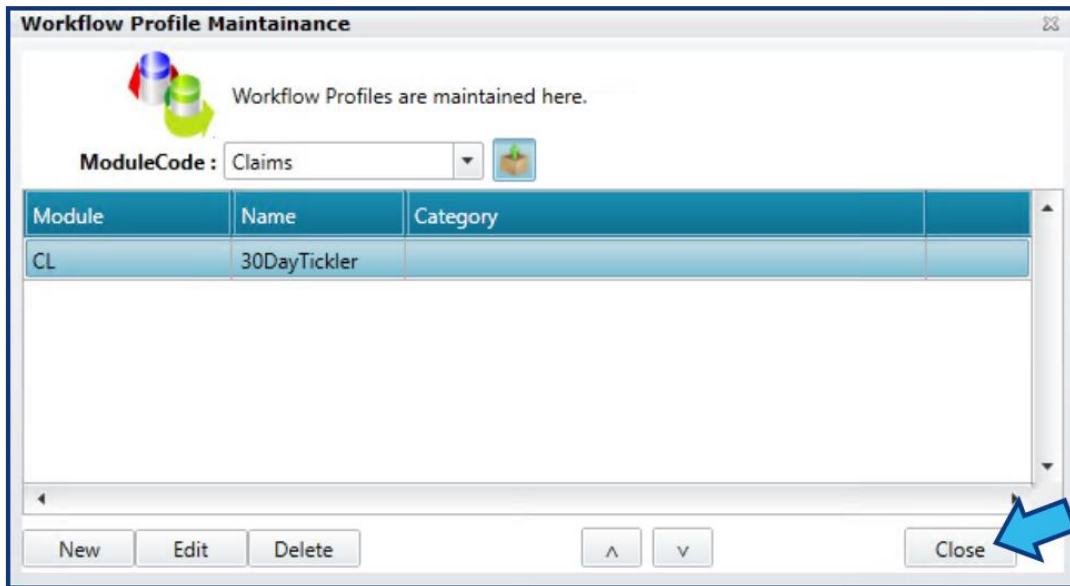
Parameter: []

Value:

New Save Edit Delete Close

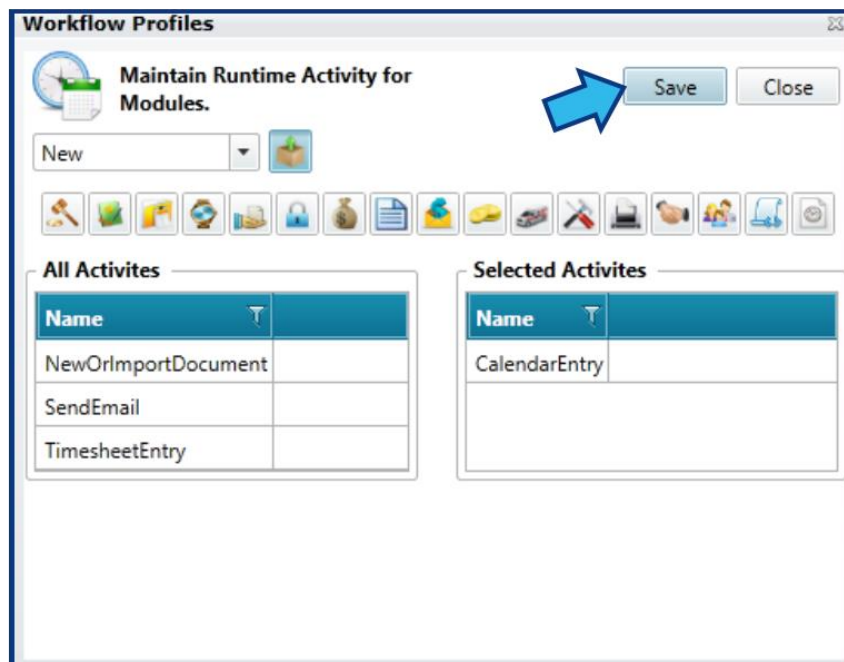
Step 16. Close the Workflow Profile Maintenance window.

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



Step 17. Save the Profile.

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



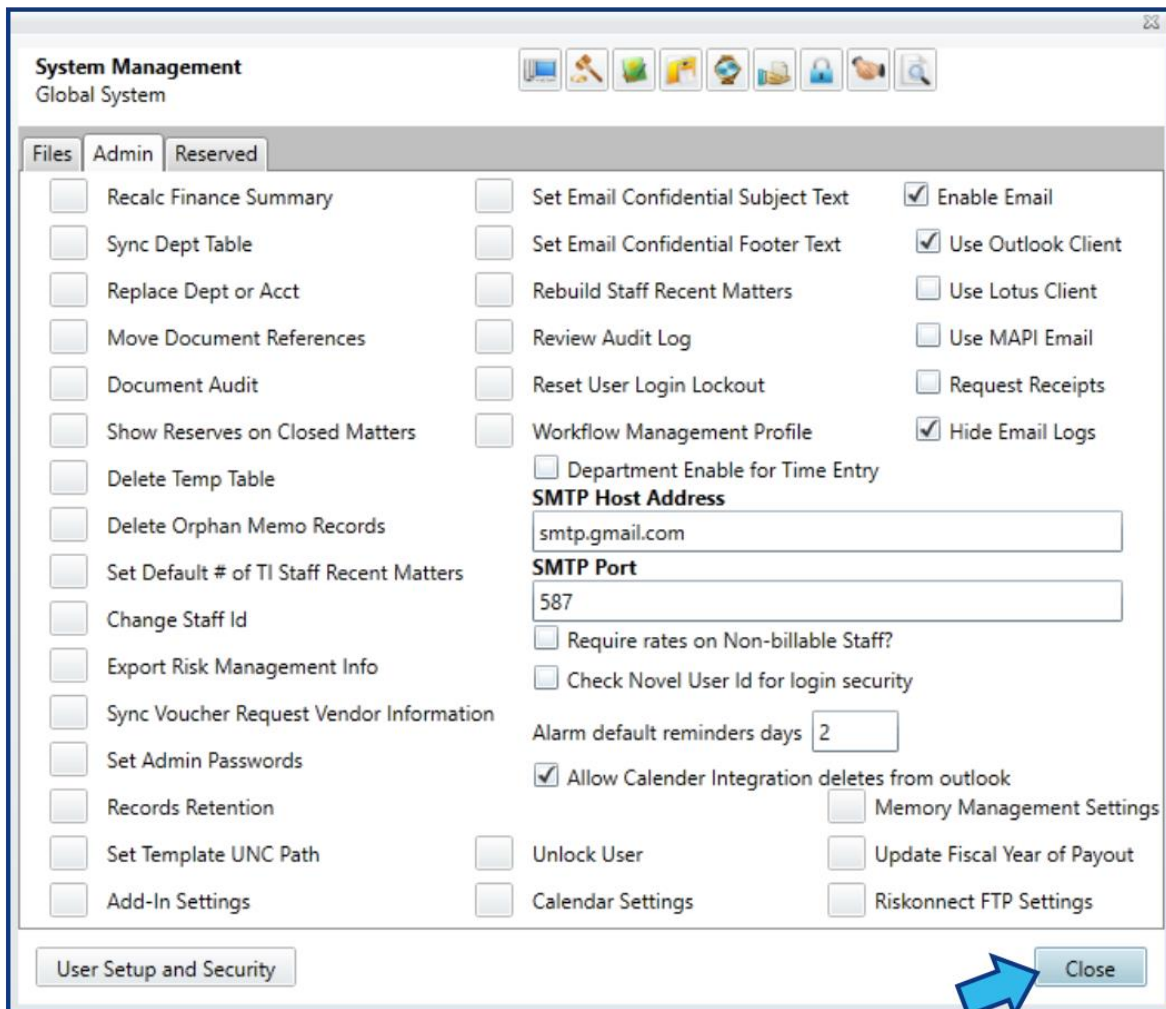
Step 18. Close the Workflow Profiles window.

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



Step 19. Close the System Management window.

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



Step 20. Confirm the calendar entry is generated as expected by creating a new matter.

Create a new matter to confirm that the automated calendar entry appears in the matter calendar as expected. If the calendar entry is not generated, repeat the steps to ensure the **Profile** and **Parameters** were entered and saved correctly.