

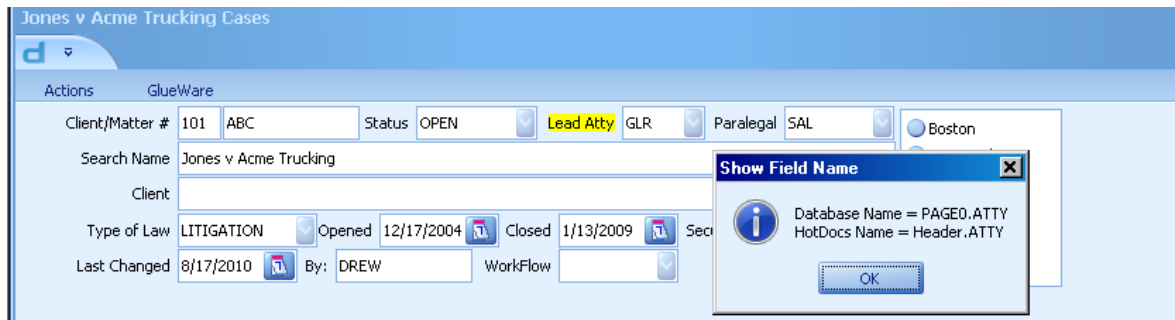
# Sample WorkFlow

This document walks you through the creation of a typical Workflow. This document is not meant to be a comprehensive guide to WorkFlow creation. For a complete reference, see the Online Admin Help.

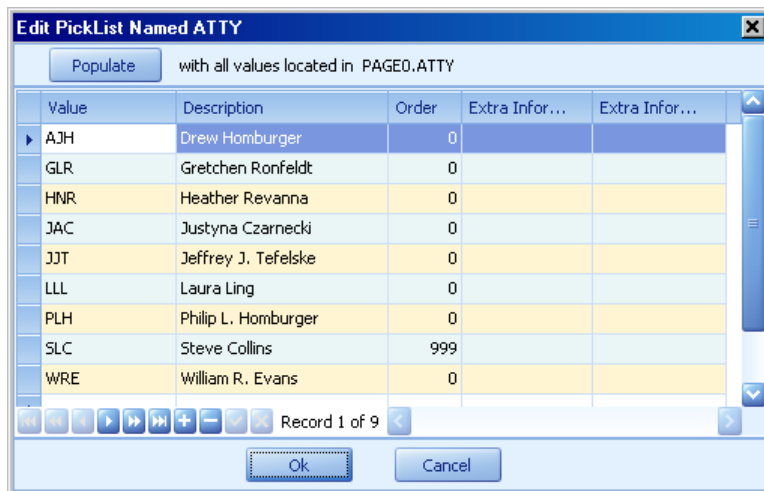
## A. Target WorkFlow

We want to build a workflow like this: when the page0.atty field is updated (newly added or changed), this workflow will:

- Create a new email
- update page0.status
- update page13.respatty and
- create a new note in the matter



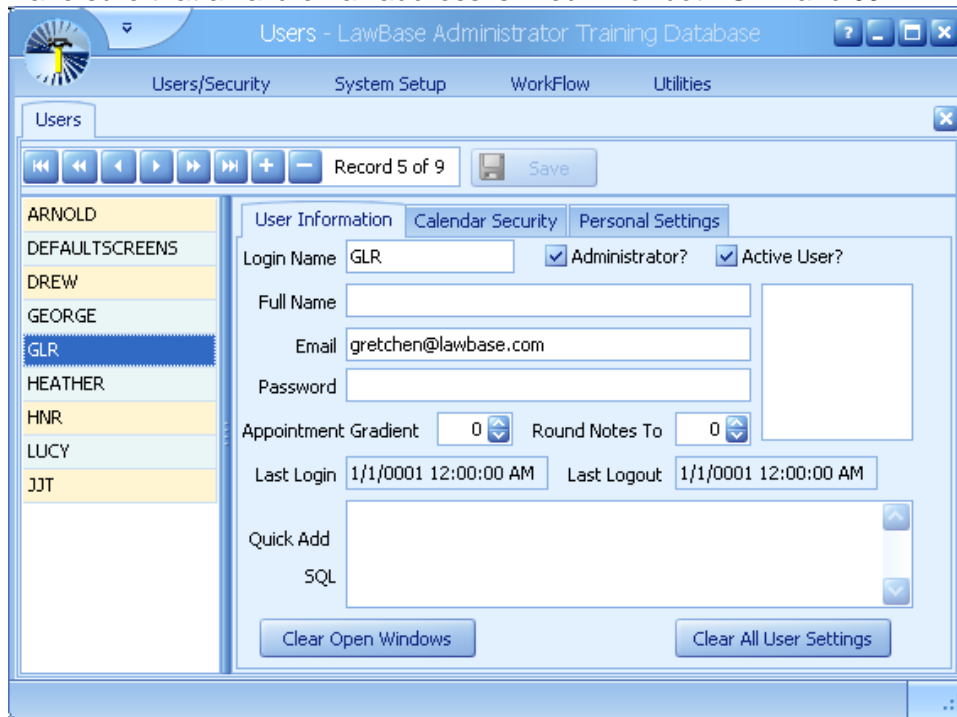
Before starting to build the workflow, make a note of the page0.atty picklist values you'll use.



In this example we'll use GLR and JJT

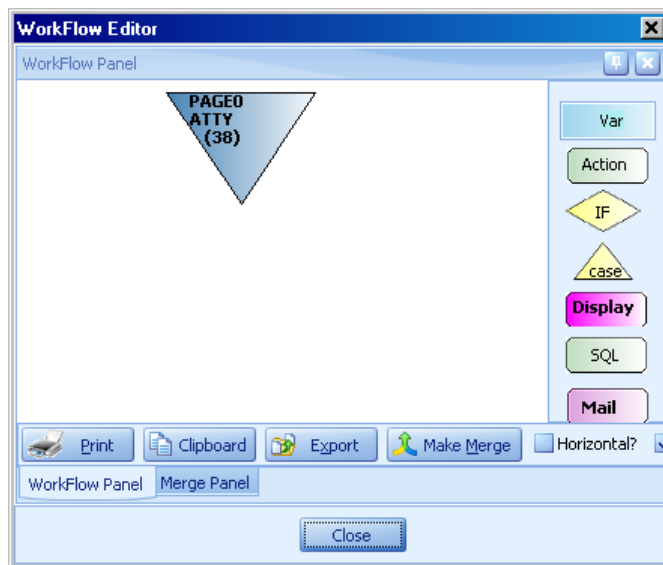
## B. Set-up

The target workflow depends on email addresses saved as part of the user profile. Make sure that a valid email address is filled in for both GLR and JJT.



## C. Start WorkFlow

1. From inside LawBase, right-click on the ATTY field.
2. Select Edit WorkFlow > Cases Global (this is the name of the WorkFlow area for the main database). You should see this WorkFlow editor appear with the beginning of the workflow displayed.



### D. Add the Case and the First VAR

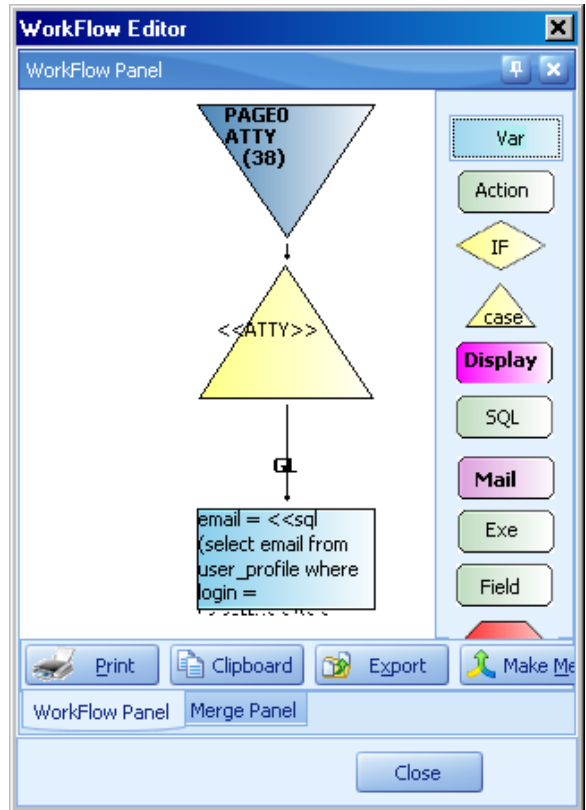
Case Items control what happens when different values are entered into text fields.

On the right is what the case and the first VAR will look like.

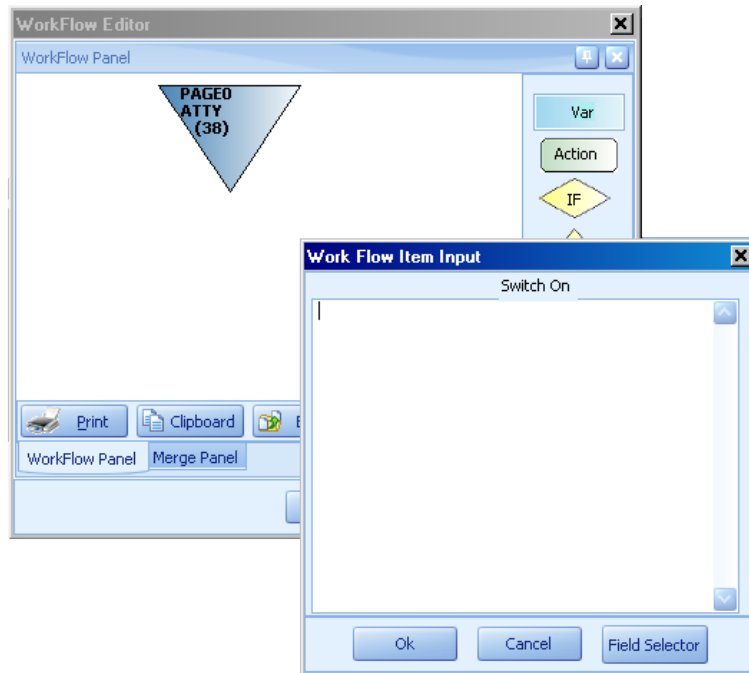
So what does this portion mean?

When the atty value changes to GLR, populate the a variable with the address specified in the user profile.

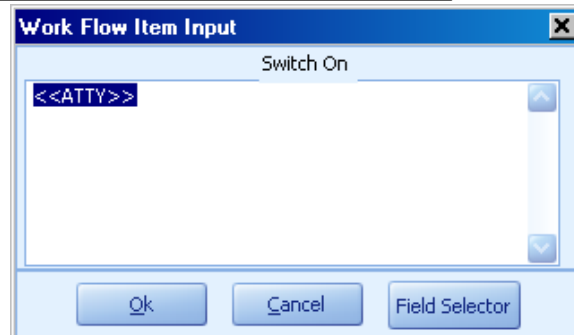
(We have to add the actual email building in the next steps. )



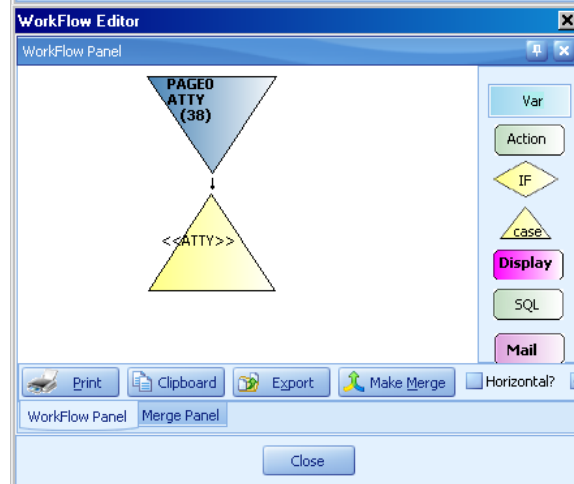
1. Drag and drop a CASE module onto your workflow header (PAGE0.atty blue triangle).



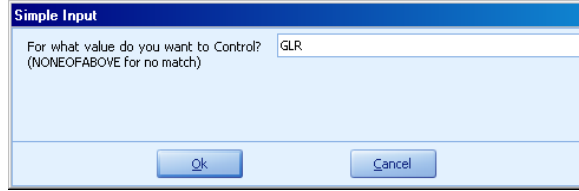
2. Fill in the Switch On field with the name of the field that triggers the change.  
**Quick tip:** if you don't know the name of the field, use the field selector.



3. Click OK and the screen should look like this:



- 4. Drag and drop a VAR module onto the case module. It will ask what value you want to control. Fill in GLR.

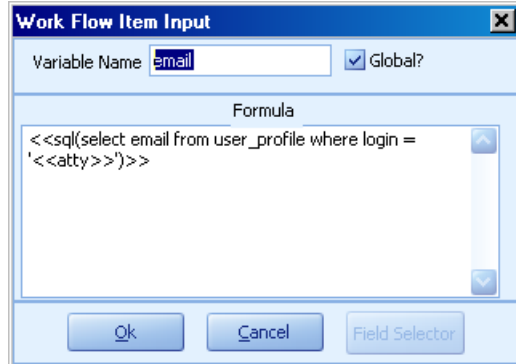


- 5. Give your VAR a name (in this example we'll call it Email).

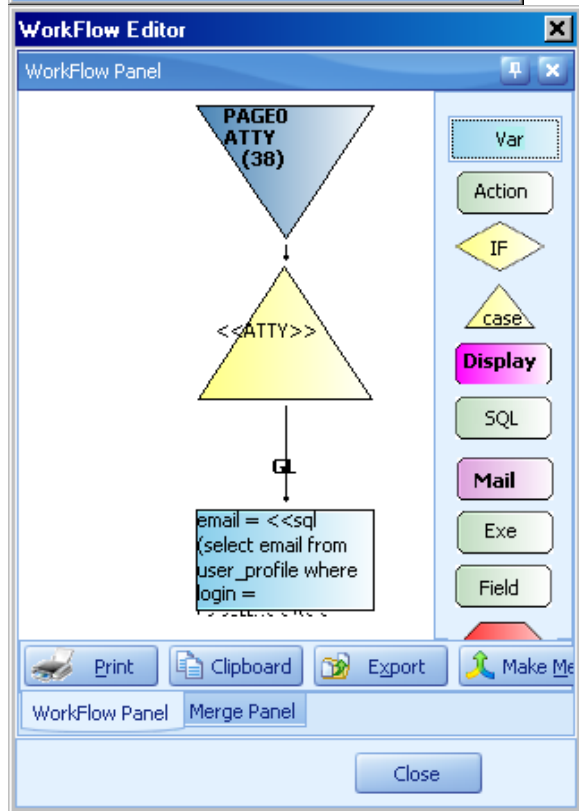
Check the Global checkbox.

Type in the following SQL:

```
<<sql(select email from user_profile where login = '<<atty>>')>>
```



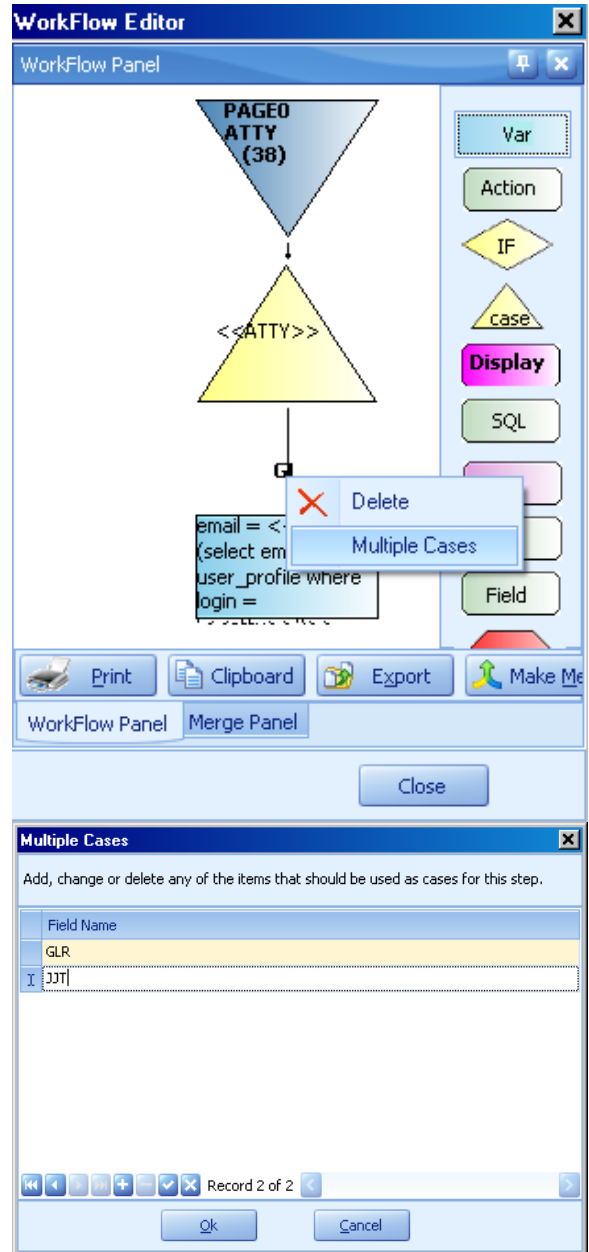
So now if the page0.atty field changes to GLR, the email variable will be set to her email address.



### E. Add a Second VAR for another Attorney

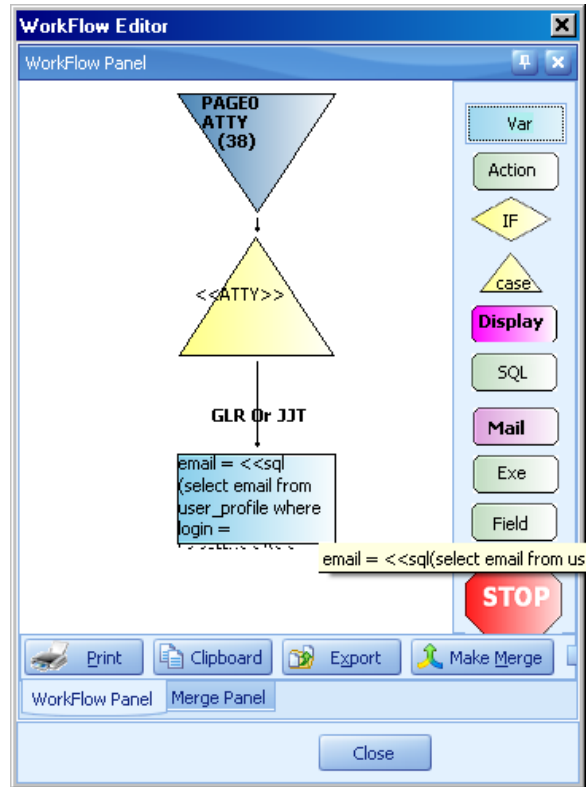
So what should LawBase do if a *different* user's initials are selected in the atty field? We need to set up multiple cases.

1. Right-click on the arrow between the case triangle and the email var and select multiple cases.



2. In the Multiple Cases dialog, click the plus at the bottom of the screen and add another record. In our example, let's fill in JJT.

The workflow should look like this:



**F. Add a VAR for None of the Above**

What should the workflow do if the attorney is neither GLR nor JJT?

Drag a STOP onto the case module.

Fill in the value NONEOFABOVE; spell it just as indicated in the example.

**Simple Input**

For what value do you want to Control?   
 (NONEOFABOVE for no match)

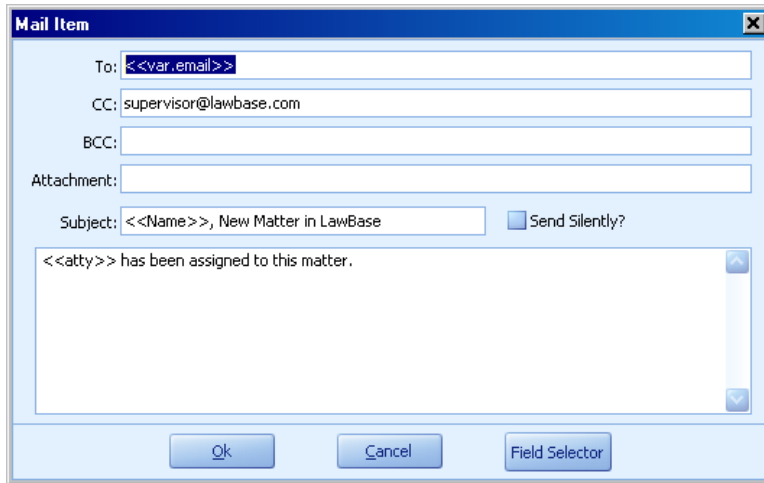
The table below summarizes what the workflow says so far:

| When Page0.atty changes to | Create the Variable Email with this value     |
|----------------------------|---|
| GLR                        | Get the email in the user account GLR.        |
| JJT                        | Get the email in the user account JJT.        |
| NONEOFTHEABOVE             | No email value is set and the workflow stops. |

So far the email variable is set; now we have to use it in the next step.

## G. Build the Email

1. Drag and drop a Mail module onto the email var. The dialog on the right appears



2. Fill in the fields as shown

|                      |   |
|----------------------|---|
| <b>To</b>            | <<var.email>>   |
| <b>Cc</b>            | supervisor@lawbase.com<br>this is hardcoded because this user is copied on all new matter emails.<br>NOTE: You may need to add SMTP: in front of the email address.<br>Example: SMTP:phil@lawbase.com   |
| <b>Subject</b>       | <<name>>, New Matter in LawBase   |
| <b>Send silently</b> | By default, this is not selected, and the workflow will trigger your email client to compose a new email. You'll be able to edit it and send it.<br>If you choose Send Silently, the email composition will not appear; the email is sent in the background silently. |
| <b>Email body</b>    | <<atty>> has been assigned to this matter.  |

3. Click OK to save the Mail module.

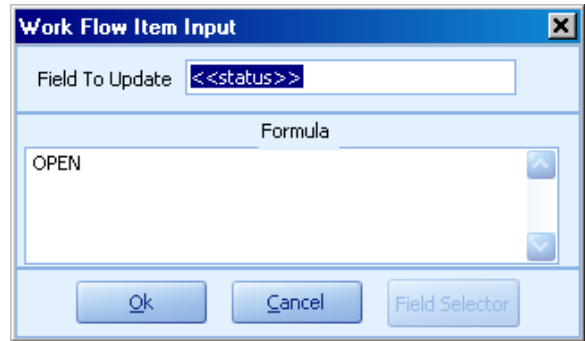
To compare what you've built, see Completed WorkFlow Event on page 11 of this document.



## H. Change the Matter Status

Next we want a change in page0.atty to trigger a change in status.

1. Drag and drop a Field module onto the Mail module.
2. Fill in the name of the field.
3. Fill in the Formula area with the text: OPEN and click OK




---

**NOTE:** The FIELD module can only be used to update a field that is stored on the same page where the workflow originates.

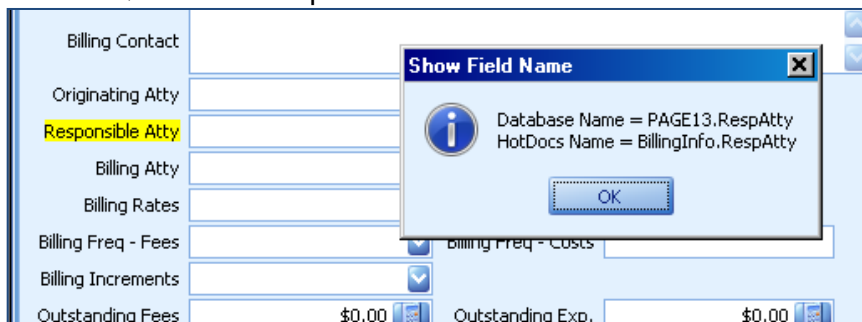
---

To compare what you've built, see Completed WorkFlow Event on page 11 of this document.

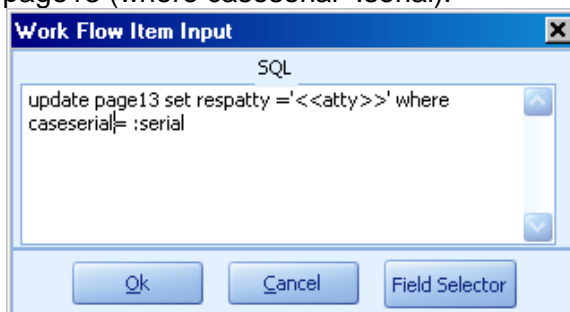
## I. Update a Field on another page

Next we want the workflow to update the Responsible Attorney on page13 (page13.respatty).

Use a SQL module to update data in a field located on another tab/page in the database.



1. Drag and drop an SQL module onto the field created in step H.
2. Enter the appropriate SQL command in the SQL box.  
In this example we are updating the field respatty on PAGE13 with the data stored in page0.atty. This should only occur on the current case we are in on page13 (where caseserial=:serial).



To compare what you've built, see Completed WorkFlow Event on page 11.

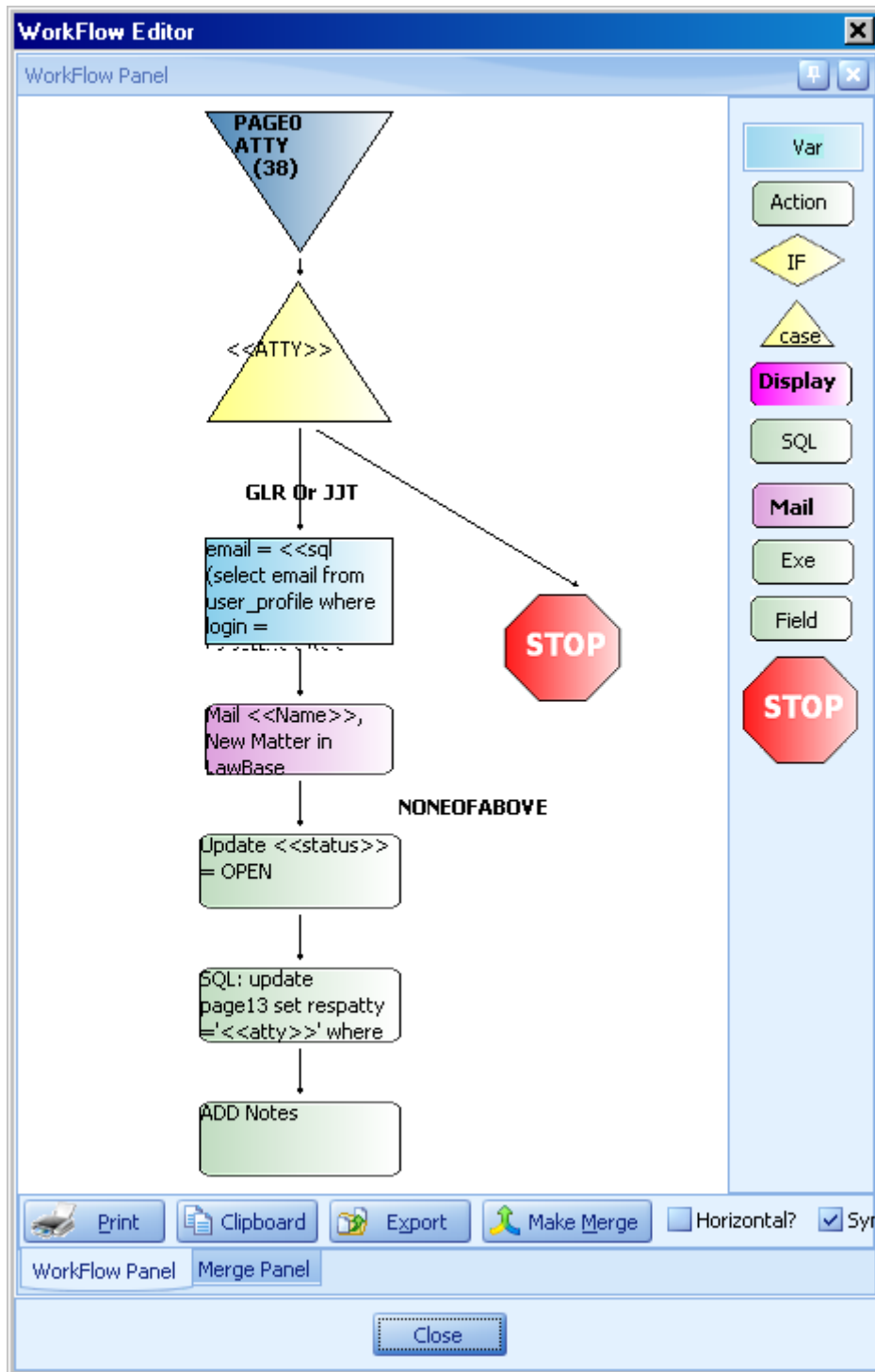
## J. Create a Note

To add a note:

1. Drag and drop an Action module onto the SQL module created in step I.
2. Select the action type: Add, Change or Delete.
3. Select the Note tab..

|                  |   |
|------------------|---|
| <b>Date</b>      | :CurDate :CurTime<br>Click the ellipsis button to choose from standard options. Double-click an option to select it.  |
| <b>By</b>        | Hardcode a name<br>or use the system variable :CurUser<br>This will fill in the name of the currently logged in user. |
| <b>Type</b>      | STATUS  |
| <b>Note memo</b> | <<atty>> was assigned to this matter today.   |

## Completed WorkFlow



Congratulations! You've created your first workflow!