How to Lock Time Entries Based on Workflow Status

Objectives:

• Prevent users from adding or updating time entries on matters with the selected workflow status

Steps:

With the new lock time entries feature, administrators gain the ability to limit users from adding or editing new time entries on matters, based on the chosen matter workflow status. For instance, this functionality is particularly useful for closed matters, those marked as executed, done, or canceled.

Configuring this functionality is straightforward: navigate to the system settings and select Setup & Configuration under the System Preferences.

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X System Maintenance License	Users & Permissions User Groups Manage Users Import Users from Azure Active Directory User Groups Permissions	Custom Fields Applicable Laws Attachment Status Attachment Type Document Generator Templates Folder Folder Templates SLA Management DocuSign integration			
System Preferences Setup & Configuration Notification Scheme Look & Feel Integrations Task & Triggers Automation Document Content Search (Full Text Search) Custom Integrations Email Customization	ííí User Management Reports Users Audit Report Login History Report User Management Report User Management Report	Email Templates			
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🔓 Single Sign On	External Advisors	Litigation Dashboard 1 - Management			

In the system values, choose the first "Lock Add/Update Matter Time Entries" option,

Settings Setup & Configuration				
Active Directory				۹ 🔺
Adobe Sign Integration	Property	Default Value		Actions
Advisor Portal	Allow feature "API"	Yes	•	Save
Contract/Document Default Values				
Client Portal	Allow feature "SLA Management"	Yes	v	Save
Default Values	Allow Custom Email	Yes	¥	Save
Delegation	Allow feature "Al"	Enabled		Save
DocuSign Integration	•			
emSigner Integration	Lock Add/Update Matter Time Entries 😯	Activate:	Yes v	Save
External Links		Lock matter workflow status	Cancelled x Closed x	
Hearing Verification Process				
Document Content Search		User groups without restriction	Administrator	
Maker Checker Control		User groups without restriction		
Menu External Links	Lock Add/Update Time Entries 🕜	Activate:	No +	Cours
Notifications			No *	Save
Outgoing Mail				
Password Policy				
Reminders				
Saven Integration				
System Values				
OAE Pass integration				
Web Hooks				

Activate it, and specify the applicable workflow statuses. Furthermore, administrators can exempt certain user groups from these restrictions, providing a flexible approach to time entry management within the system.

Subsequently, users will face restrictions when attempting to add or update time entries on matters under the chosen workflow.

	Time entry	×		× ×
	Type* Matter •	Matter* M00002260: BLP VS STM administrative Case		Error Unable to add time entry. Related matter has a
	Date* 2023-11-16	Effort*	1.00	'Cancelled' status and is locked for further time logs.
	Description	Category + Add New Choose One		
		Internal Status + Add New To-Be Reviewed •	•	
		Client* 🗌 Non-Billable 😗		
		BLP industry Q		
	> More Fields > Audit			
	Save Save and duplicate	Cancel		
and the second se				

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Thank you!