

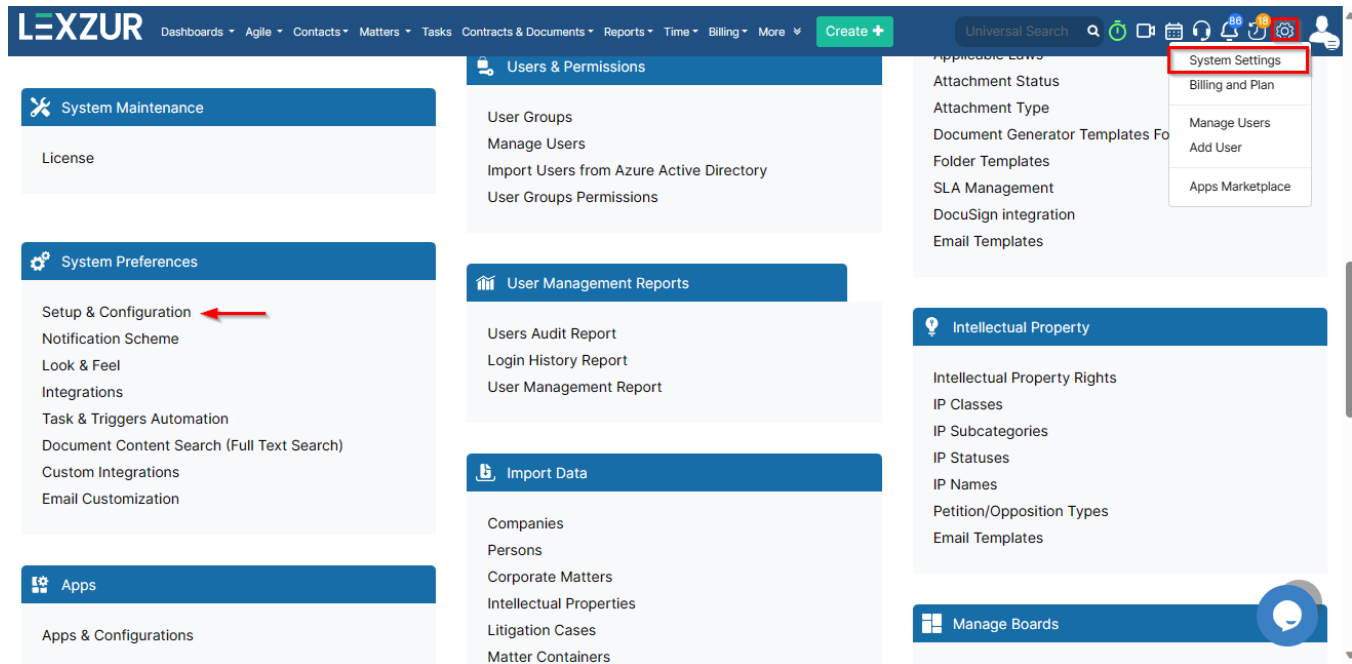
How to lock Time Entries

Objectives

- Restrict the user to add or update time logs for matters.
- Restrict the user to add or update time logs for the previous days.
- Restrict the user to add or update time logs for the previous month
- Restrict users from adding new time logs, if none were added for the previous day.

Steps

To be able to restrict the users from adding or updating time logs for a previous period, you have to go to system settings, then Setup and Configuration.



On the System Values tab, go to "Lock Add/Update Matter Time Entries", click "Yes" to activate it, specify the workflows that you want to lock, you can select groups that will not follow this restriction, then click on "Save".

Settings / Setup & Configuration

Active Directory	Allow feature "AI"	Enabled	Save
Adobe Sign Integration	Lock Add/Update Matter Time Entries ?	Activate: Yes Lock matter workflow status: Closed User groups without restriction: Select	Save
Advisor Portal	Lock Add/Update Time Entries ?	Activate: No Days in Past: 0 User groups without restriction: Select	Save
Contract/Document Default Values	Monthly Lock Add/Update Time Entries ?	Activate: No During Days: 7 User groups without restriction: Select	Save
Client Portal	Lock Time Entries ?	Activate: No Starting from: 03/14/2023	Save
Default Values			
Delegation			
DocuSign Integration			
emSigner Integration			
External Links			
Hearing Verification Process			
Document Content Search			
Maker Checker Control			
Menu External Links			
Notifications			
Outgoing Mail			
Password Policy			
Reminders			
Sayen Integration			
System Values			
UAE Pass Integration			
Web Hooks			

To prevent users from adding/editing time entries before 'x' number of days, go to "Lock Add/Update Time Entries", click "Yes" to activate it, specify the number of days in the past, you can select groups that will not follow this restriction, then click on "Save".

Active Directory	Allow feature "AI"	Enabled	Save
Adobe Sign Integration	Lock Add/Update Matter Time Entries ?	Activate: Yes Lock matter workflow status: Closed User groups without restriction: Select	Save
Advisor Portal	Lock Add/Update Time Entries ?	Activate: No Days in Past: 0 User groups without restriction: Select	Save
Contract/Document Default Values	Monthly Lock Add/Update Time Entries ?	Activate: No During Days: 7 User groups without restriction: Select	Save
Client Portal	Lock Time Entries ?	Activate: No Starting from: 03/14/2023	Save
Default Values			
Delegation			
DocuSign Integration			
emSigner Integration			
External Links			
Hearing Verification Process			
Document Content Search			
Maker Checker Control			
Menu External Links			
Notifications			
Outgoing Mail			
Password Policy			
Reminders			
Sayen Integration			
System Values			
UAE Pass Integration			
Web Hooks			

To prevent users from adding/editing time entries in the previous month, during the first "x" days of the current month, simply choose the Monthly Lock Time Entries, Activate it, specify the Days and the restricted groups.

Active Directory	Allow feature "AI"	Enabled	Save
Adobe Sign Integration	Lock Add/Update Matter Time Entries ?	Activate: Yes Lock matter workflow status: Closed User groups without restriction: Select	Save
Advisor Portal	Lock Add/Update Time Entries ?	Activate: No Days in Past: 0 User groups without restriction: Select	Save
Contract/Document Default Values	Monthly Lock Add/Update Time Entries ?	Activate: No During Days: 7 User groups without restriction: Select	Save
Client Portal	Lock Time Entries ?	Activate: No Starting from: 03/14/2023	Save
Default Values			
Delegation			
DocuSign Integration			
emSigner Integration			
External Links			
Hearing Verification Process			
Document Content Search			
Maker Checker Control			
Menu External Links			
Notifications			
Outgoing Mail			
Password Policy			
Reminders			
Sayen Integration			
System Values			
UAE Pass Integration			
Web Hooks			

To be able to restrict the users from adding new time logs if no time was logged from the previous day, in the same page, go to "Lock Time Entries", click "Yes" to activate it, select the starting from date, then click on "Save".

Active Directory	Allow feature "AI"	Enabled	Save
Adobe Sign Integration	Lock Add/Update Matter Time Entries ?	Activate: Yes Lock matter workflow status: Closed User groups without restriction: Select	Save
Advisor Portal	Lock Add/Update Time Entries ?	Activate: No Days in Past: 0 User groups without restriction: Select	Save
Contract/Document Default Values	Monthly Lock Add/Update Time Entries ?	Activate: No During Days: 7 User groups without restriction: Select	Save
Client Portal	Lock Time Entries ?	Activate: No Starting from: 03/14/2023	Save
Default Values			
Delegation			
DocuSign Integration			
emSigner Integration			
External Links			
Hearing Verification Process			
Document Content Search			
Maker Checker Control			
Menu External Links			
Notifications			
Outgoing Mail			
Password Policy			
Reminders			
Sayen Integration			
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Web Hooks			

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!