Invoice Adjustment Vendor Comments Package Validation Rule and Workflow Rule Installation Instructions

Introduction

This document describes how to install and configure the eCounsel rules that make up the Invoice Adjustment Vendor Comments Package.

Optional Upgrade Instructions

Follow the instructions in the main body of the document if you are doing a new (fresh) install.

If you have any questions or difficulties with the installation, please refer to your Implementation Consultant or Mitratech Support for assistance.

The distribution package includes the following files:

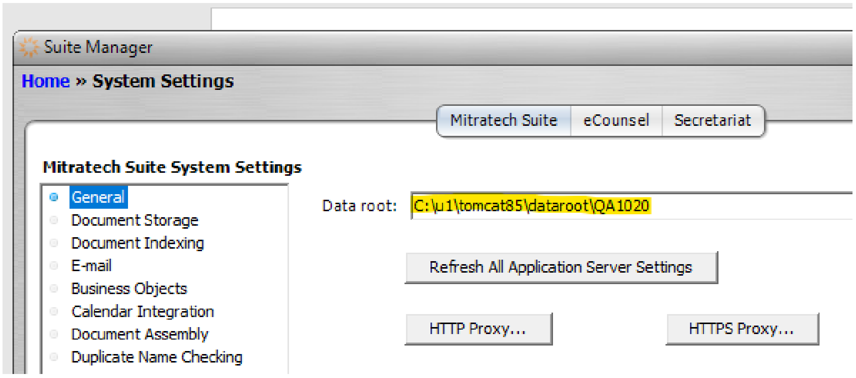
Files	Description
Invoice Adjustment Vendor Comments Package – Installation Instructions.pdf	This installation document
Invoice Adjustment Vendor Comments - Validation.docx Invoice Adjustment Vendor Comments - Workflow.docx	Specifications
tsutil-3.05.jar (latest)	Support Library
Invoice Adjustment Vendor Comments - Email Template.txt	Email Template
InvoiceAdjustmentVendorComments_Validation.properties InvoiceAdjustmentVendorComments_Workflow.properties	Parameter Files
InvoiceAdjustmentVendorComments_Validation.bsi InvoiceAdjustmentVendorComments_Workflow.bsi	Invoice Workflow Rules

Prerequisites

Before starting the installation, there are a few things that need to be done first.

- **Suite Manager Access**: You will need to be able to run and login to the Suite Manager application and have permission to install rules. (Suite Manager is a locally installed application or available through XenApp for Hosted clients, not a web application.)

- **System Data Root Access**: You will also need access to Suite's "data root" folder. The data root folder is defined in Suite Manager using the *System Settings* component, as shown below. You will need access to this folder and the ability to create files and folders under it. (We'll refer to the data root using the notation {dataroot} from here on.)



Install the Support Library

The Invoice Routing package comes with a support library that need to be installed before you can import the rules themselves.

Mitratech's eCounsel standard Rule Support Library, named tsutil-*n.nn*.jar, where *n.nn* is the library version number (for example, if the name of the file is tsutil-3.05.jar, the version of the library is 3.05.) should be installed by copying it to the {dataroot}/scripts/lib folder.

If you already have the ***same version*** of the Rule Support Library file installed, overwrite an existing file with the same name if there is one.

VERY IMPORTANT: If there are older versions of the Rule Support Library already in the lib directory, ***DO NOT DELETE THEM***, as they may be required by other rules. Each rule or script will always use the specific version of the Rule Support Library that it was developed for. *New versions of the library do not replace older ones*.

Install the Email Template

The Invoice Adjustment Vendor Comments package includes a "template" file for the email notifications that it sends out. The template does not require modification before being installed, but you can review the text of the messages if you like and make any desired changes.

The template file is a simple text file that can be edited with any text editor (Notepad). A sample is shown below.

```
#Initial Release: Vendor Email Template
The following invoice has been posted:

Invoice Number: @Vendor Invoice Number@
Firm Name: @Firm Name@
Total Billed: @Original Invoice Amount@ @Currency Type@
Total Adjustments Billed: @Total Adjustments Billed@ @Currency Type@
Adjusted Base: @Adjusted Base@ @Currency Type@

Adjustment Comments for Vendor:
Matter(s):
@Vendor Comments Body@
```

The notifications are all sent as HTML, so standard HTML tags may be used as well. Install the Email Template by copying it to the {dataroot}/config folder.

Install the Parameter Files

Each of the rules in the package has a parameter (properties) file that it uses. To install the parameter files, copy all of them to the {dataroot}/config folder.

Install the Invoice Validation Rule

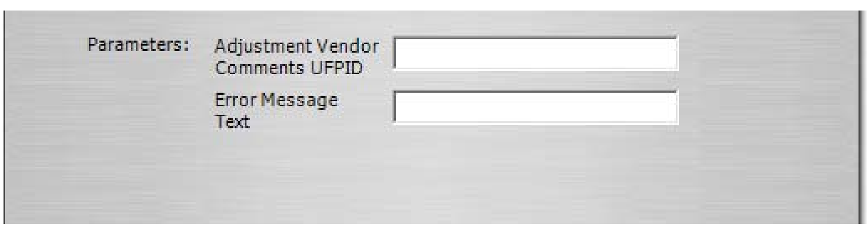
The next step in the installation process is to install the Invoice Validation Rule included in the package: ***InvoiceAdjustmentVendorComments_Validation.bsi***

- Log in to the Suite Manager application and click the **Rules Engine** icon in the Tools & Utilities section, then click the **Validation Rules** option. If the "Enable Validation Rules" checkbox is not checked, check it now before continuing.

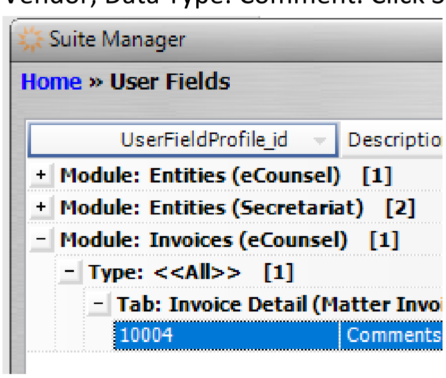
- If this is an update to an existing rule, the existing rule needs to be deleted from the system before the update is installed. To delete an existing rule, click on the rule to select it, click the **Delete** button, and then click “**Yes”** on the Confirmation dialog. (If this is the first time the rule is being installed, just skip to the next step.)

- Click the **Import** button, browse to the location where you extracted the files above, select the rule file, and click **Open**.

- The **Validation Rule Profile Information** dialog will be displayed.



Adjustment Vendor Comments UFPID: Enter the UserFieldProfile_id (number) created in Suite Manager User Fields. Log into Suite Manager then go to User Fields, click New button and select Module: Inovices, Tab: Invoice Detail (Matter Invoice Detail), Description: Comments to Send to Vendor, Data Type: Comment. Click Save and Close, this will generate a new UserFieldProfile_id.



Error Message Text: Enter the desired error text message that will be displayed to the User when leaving the comments empty to send to a vendor.

Install the Invoice Workflow Rule

Installing the Invoice Workflow Rule included in the package:
InvoiceAdjustmentVendorComments_Workflow.bsi

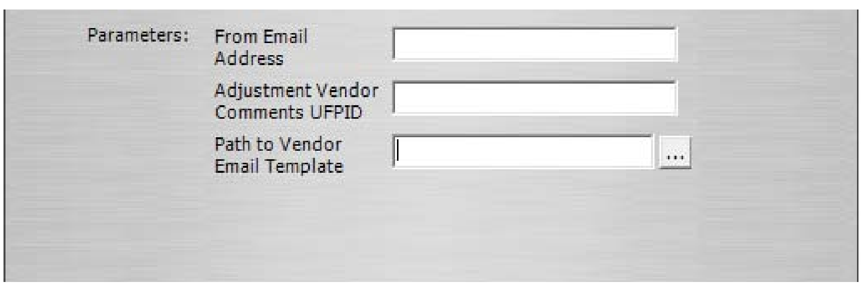
Follow the steps below to install this rule:

- Log in to the Suite Manager application and click the **Rules Engine** icon in the Tools & Utilities section, then click the **Workflow** option. If the "Enable Workflow Rules" checkbox is not checked, check it now before continuing.

- If this is an update to an existing rule, the existing rule needs to be deleted from the system before the update is installed. To delete an existing rule, click on the rule to select it, click the **Delete** button, and then click "**Yes"** on the Confirmation dialog. (If this is the first time the rule is being installed, just skip to the next step.)

- Click the **Import** button, browse to the location where you extracted the files above, select the rule file, and click **Open**.

- The **Workflow Rule Profile Information** dialog will be displayed, fill the parameters below.



From Email Address – Enter the email address to be used as the "From" address for administrative emails generated by the rule. (This doesn't have to be an actual email address, but the format must be correct.)

Adjustment Vendor Comments UFPID: Enter the UserFieldProfile_id (Same ID number used in the Validation Rule) created in Suite Manager User Fields. Log into Suite Manager then go to User Fields, click New button and select Module: Inovices, Tab: Invoice Detail (Matter Invoice Detail), Description: Comments to Send to Vendor, Data Type: Comment. Click Save and Close, this will generate a new UserFieldProfile_id.

Path to Vendor Email Template – The physical path where the Email template text file is located.

Change Log

Version	Date	Description
1.0	09/25/2019	Initial Release