

Andes Tupungato

Document Assembly Multi-Component Assignment FDS

Created on April 26, 2001
by Tom Foley

Revision No. **12**

Last Saved on **March 27, 2002**
By Tom Foley

This document contains confidential and proprietary information of
RealLegal, Inc..

The electronic form of this document can be found in
c:\documents and settings\tfoley\my
documents\rl.stuff\dev\pm_core\andes\pm87.salado\specs\pm.doc
ument\pm.documents.fds.rev04.doc

Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Created on April 26, 2001
By Tom Foley.

Revision No. **12**, Last Saved on **March 27, 2002**
By Tom Foley

PROPRIETARY NOTICE

Copyright © 2001 RealLegal, Inc.. All rights reserved.

LAW.com, the LAW.com logo, Practice Manager and the Practice Manager “swoosh” logo are either trademarks or registered trademarks of RealLegal, Inc..

Microsoft is a registered trademark of Microsoft Corporation. All other company or product names appearing in this document are for identification only and may or may not be trademarks or registered trademarks of their respective holders.

LAW.com Practice Manager is licensed and subject to the conditions and limitations of the LAW.com Software Licensing Agreement.

The information herein is the property of RealLegal, Inc. and any misuse or abuse will result in economic loss. **DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM REALLEGAL, INC..**

CONFIDENTIAL INFORMATION

This document is provided for limited and restricted purposes in accordance with a binding contract with RealLegal, Inc.. The information herein includes trade-secrets and should all be considered confidential.

DISCLAIMER

THE INFORMATION IN THIS DOCUMENT WILL BE SUBJECT TO PERIODIC CHANGE AND UPDATING. PLEASE CONFIRM THAT YOU HAVE THE MOST CURRENT VERSION. THERE ARE NO WARRANTIES OF ANY KIND, EXPRESS OR IMPLIED, PROVIDED IN THIS DOCUMENTATION, OTHER THAN THOSE EXPRESSLY AGREED UPON IN THE APPLICABLE REALLEGAL, INC. CONTRACT, ERRORS AND OMISSIONS EXCEPTED.

For additional information, contact:

RealLegal, Inc.

The Application Division of Law.com
1781 Mars Hill Road
Watkinsville, GA 30677

Tel: 800.440.8109
Tel: 706.310.1515
Fax: 706.310.1323

Sign-off

Name/Title	Dave Schroeder Chief Technology Officer
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Susan Huszagh
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Christopher T. Anderson, Esq. Director, Practice Manager Client Services
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Cynthia Kutka
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Paul O'Brien
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Richard Greenspan
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	David Floyd Director, Practice Manager Application Support
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Fredrick W. Huszagh, II Director, Practice Manager Application Development
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Gayle Davis Senior Technical Writer, Practice Manager Applications
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Ken Fusco Director, Practice Manager Quality Assurance
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Lee Childs Senior Engineer, Practice Manager Applications
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Darius Kirna Lead Developer, Presentation Team, Lithuania
Signature/Date	
	<input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Change History

Version No.	Date	Name	Description of Changes
01	04/23/2001	Tom Foley	Added Storyboards. Modified mockups based on input from Ruslan. Added Use Cases.
02	04/26/2001	Tom Foley	Modified Assignment Window to use radio buttons for List and Tree Filters. See Sections 7.1 and 7.2.
03	05/09/2001	Tom Foley	Updated Image Links. Added Section 1 Deferred Functionality.
04	05/11/2001	Tom Foley	Modified 7.1 Document Assembly Assignment Page – FormView and 7.2 Document Assembly Assignment Page – FormView with additional filter changes on the Components and Assignment listings.

Contents

- 1. Deferred Functionality1**
- 2. Scope of Function Design Specification1**
 - 2.1. General Definition1
 - 2.2. Definition of Project1
 - 2.3. Scope of Document.....2

- 3. Security Considerations2**
- 4. Document Assembly Settings – Assignment – Storyboards3**
 - 4.1. Document Assembly Settings – Assign Components.....3
 - 4.2. Document Assembly Settings – Assign Components – Properties4
 - 4.3. Document Assembly Settings – Assign Components – Hi-level Logic5

- 5. Document Management – Generate Document – Storyboards6**
 - 5.1. Generate Document – From FormView6
 - 5.2. Generate Document – From TreeView.....7
 - 5.3. Generate Document – From ListView.....8

- 6. PM 8.5 Document Assembly and Document Management Screens.....9**
 - 6.1. Document Assembly Settings – Assign Tab.....9
 - 6.2. Document Assembly Settings – Report.....9
 - 6.3. Document Profile.....10
 - 6.4. Document Profile – Choose Component (Tree)10
 - 6.5. Document Profile – Template.....11

- 7. Document Assembly Mockups.....12**
 - 7.1. Document Assembly Assignment Page – FormView.....12
 - 7.2. New Document Assembly Assignment Page – TreeView18
 - 7.3. New Document Assembly Assignment – Properties Window23

- 8. Document Management Mockups.....26**
 - 8.1. Document Profile – New26
 - 8.2. Document Profile – Edit31

- 8.3. Document Profile – Template.....34
- 8.4. Document Profile – Choose Components – TreeView.....39
- 8.5. Document Profile – Choose Components – ListView.....41

- 9. Use Cases43**

 - 9.1. Manage Document Assembly Components.....43
 - 9.1.1. Assign Components in ListView.....43
 - 9.1.2. Assign Components in TreeView.....46
 - 9.1.3. Assign Components in FormView49
 - 9.1.4. Unassign Components.....51
 - 9.2. Generate Outgoing Document53
 - 9.2.1. Generate Outgoing Documents in FormView53
 - 9.2.2. Generate Outgoing Documents in TreeView56
 - 9.2.3. Generate Outgoing Documents in ListView59

- 10. Assignment Variations62**

Andes Tupungato • Document Assembly Multi-Component Assignment FDS

1. Deferred Functionality

The following functionality is being deferred from Andes – Tupungato:

1. TreeView in Document Profile (See 8.4 Document Profile – Choose Components – TreeView)
2. ListView in Document Profile (See 8.5 Document Profile – Choose Components – ListView)
3. TreeView in Document Assembly Assignment (See 7.2 New Document Assembly Assignment Page – TreeView)
4. Document Assembly Assignment Property Windows (See 7.3 New Document Assembly Assignment – Properties Window)

2. Scope of Function Design Specification

2.1. General Definition

A Functional Design Specification (FDS) is a document based on a Functional Requirements Specification (FRS), and contains the following:

- Storyboards that describe high-level workflow
- Mockups of the various UI screen components, including controls, menus, pages, forms and dialog boxes
- Models and structure of the underlying data model
- Use cases that describe low-level detail of the workflow

The FRS and FDS, together, are used to support the following:

- Development of the Technical Design Specification (TDS), which is ultimately used by engineers to develop the solution defined by the project
- Procedural text for product help and documentation, as well as training materials
- Test cases for QA

2.2. Definition of Project

This project specifically addresses modifying the assignment of document assembly components to document types.

In 8.0, the assignment model was one template/boilerplate to each law category/law type/document category/document type assignment. This proves very complex when implementing due to the high number of assignments.

In 8.5, the attempt was made to allow multiple components of the same type (template/boilerplate) to be assigned to a single law category/law type/document category/document type assignment. This was handled through the use of Multi-Components, or Component Groups. Each component group

could have multiple assignments of templates/boilerplates. A group would then be assigned to law category/law type/document category/document type combination, thereby allowing a single assignment to have multiple components.

There were several flaws with the design/implementation of Multi-components in 8.5:

1. The Component Groups were not Law Type-specific. You could assign a component created for one Law Type (e.g., Real Estate) to a Component Group, and then assign that Component Group to a different Law Type (e.g., Criminal Defense). By not making Component Groups Law Type-specific, the integrity of the implementation model was violated.
2. The Component Groups, in fact, added another level of assignment that was not there before. Before you could assign multiple components to a law category/law type/document category/document type, you would have to first assign them to a Component Group. If Component Groups were made Law Type-specific, the complexity of implementation would be severe.

The solution is to allow multiple sets of components to be assigned to the combination of law category/law type/document category/document type. When a document is generated, the user can select from any one of the component combinations.

If time permits, we also want the user to be able to bypass the assigned component combinations and choose from components that have been created for the Law Category or Law Type of the matter, as well as Common.

2.3. Scope of Document

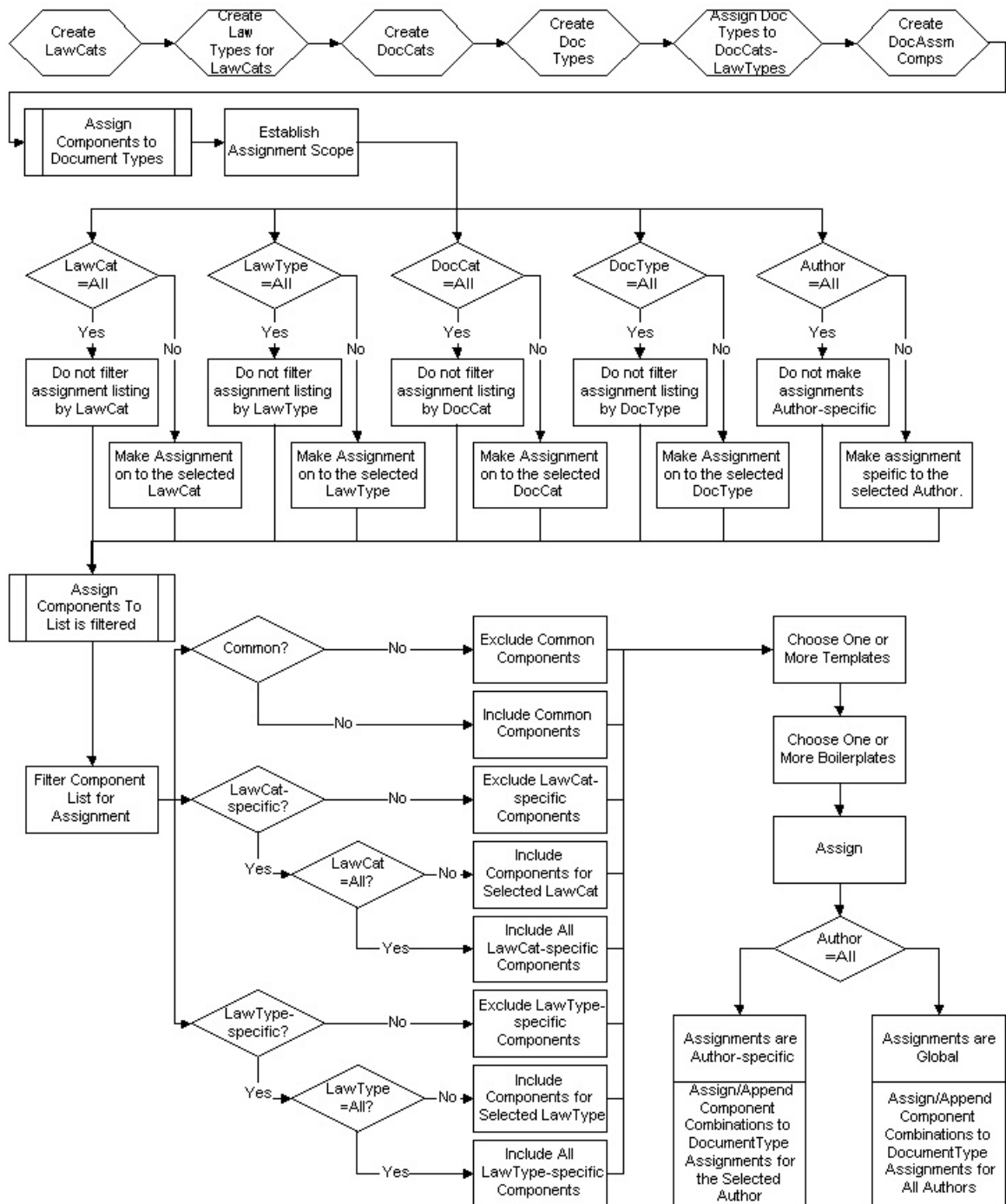
This document only addresses the user interface changes necessary to support assigning multiple sets of document assembly components to document types, as well as using those components in document assembly.

3. Security Considerations

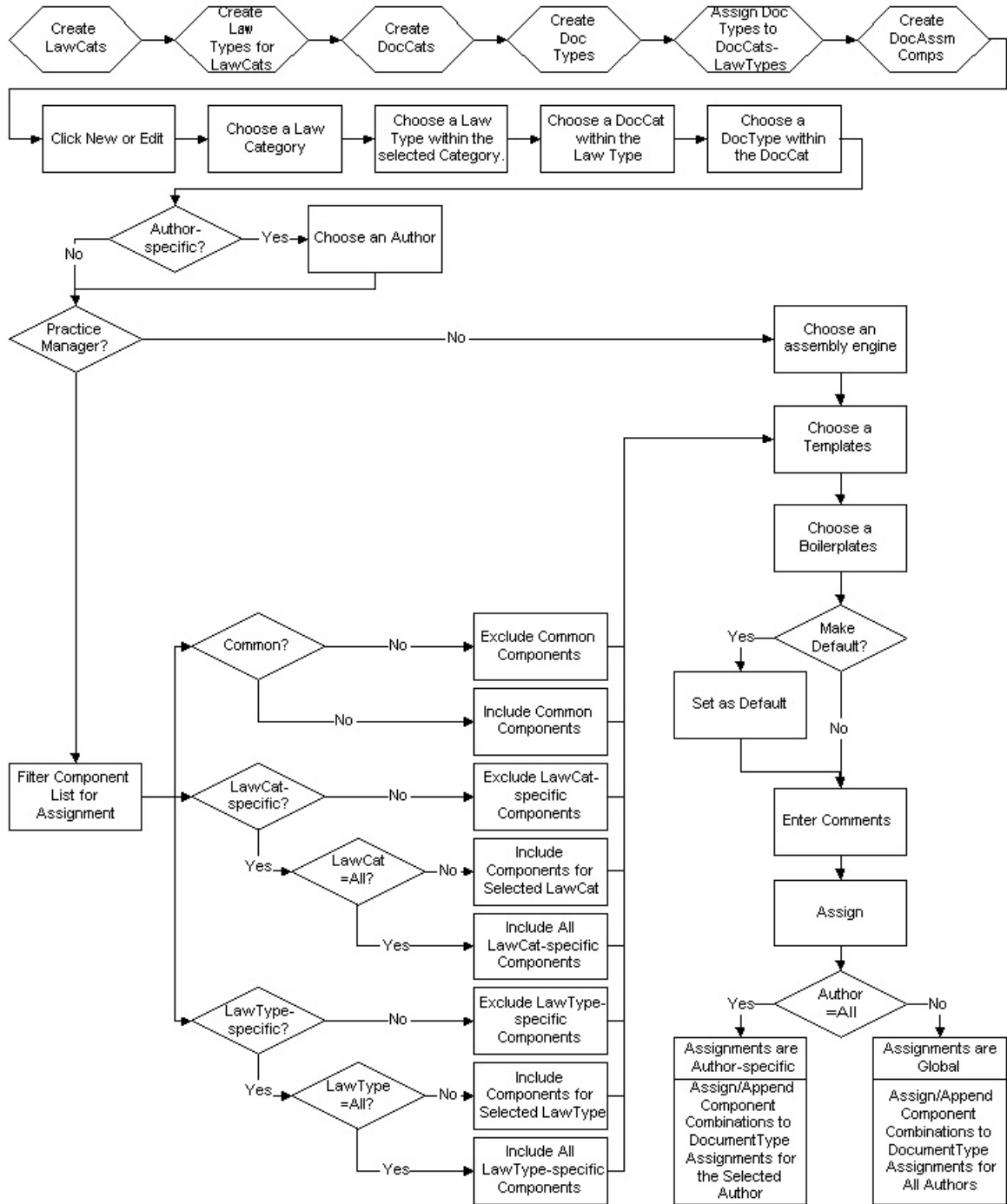
Security considerations are inherited from the current Practice Manager security model.

4. Document Assembly Settings – Assignment – Storyboards

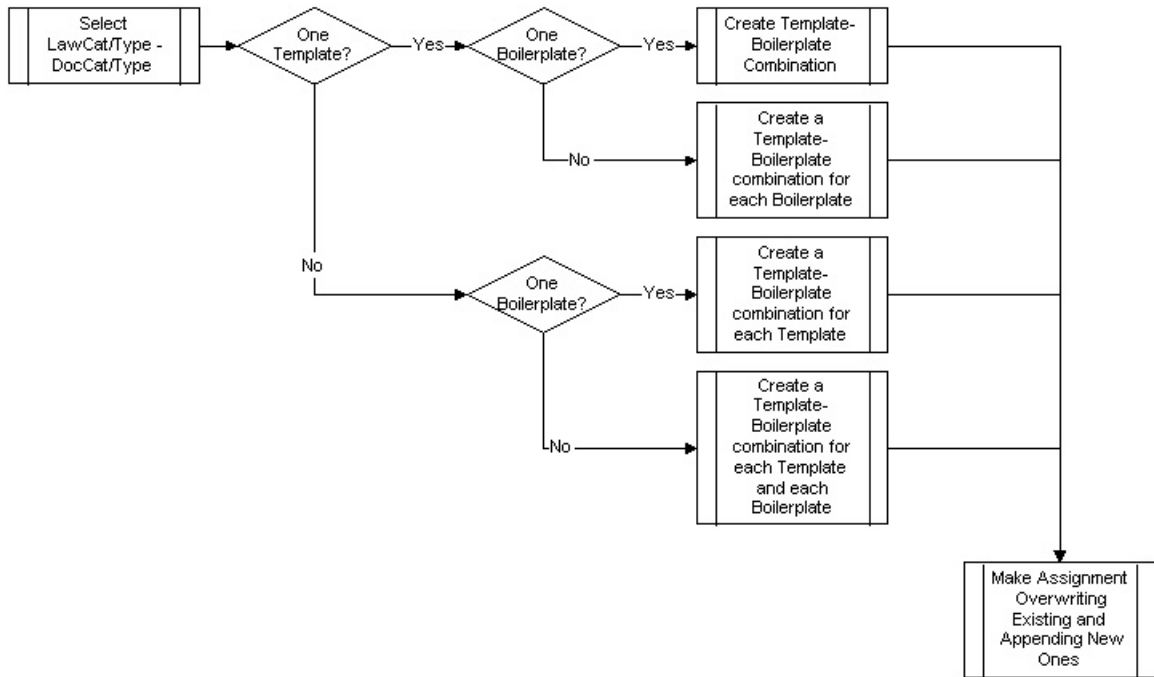
4.1. Document Assembly Settings – Assign Components



4.2. Document Assembly Settings – Assign Components – Properties

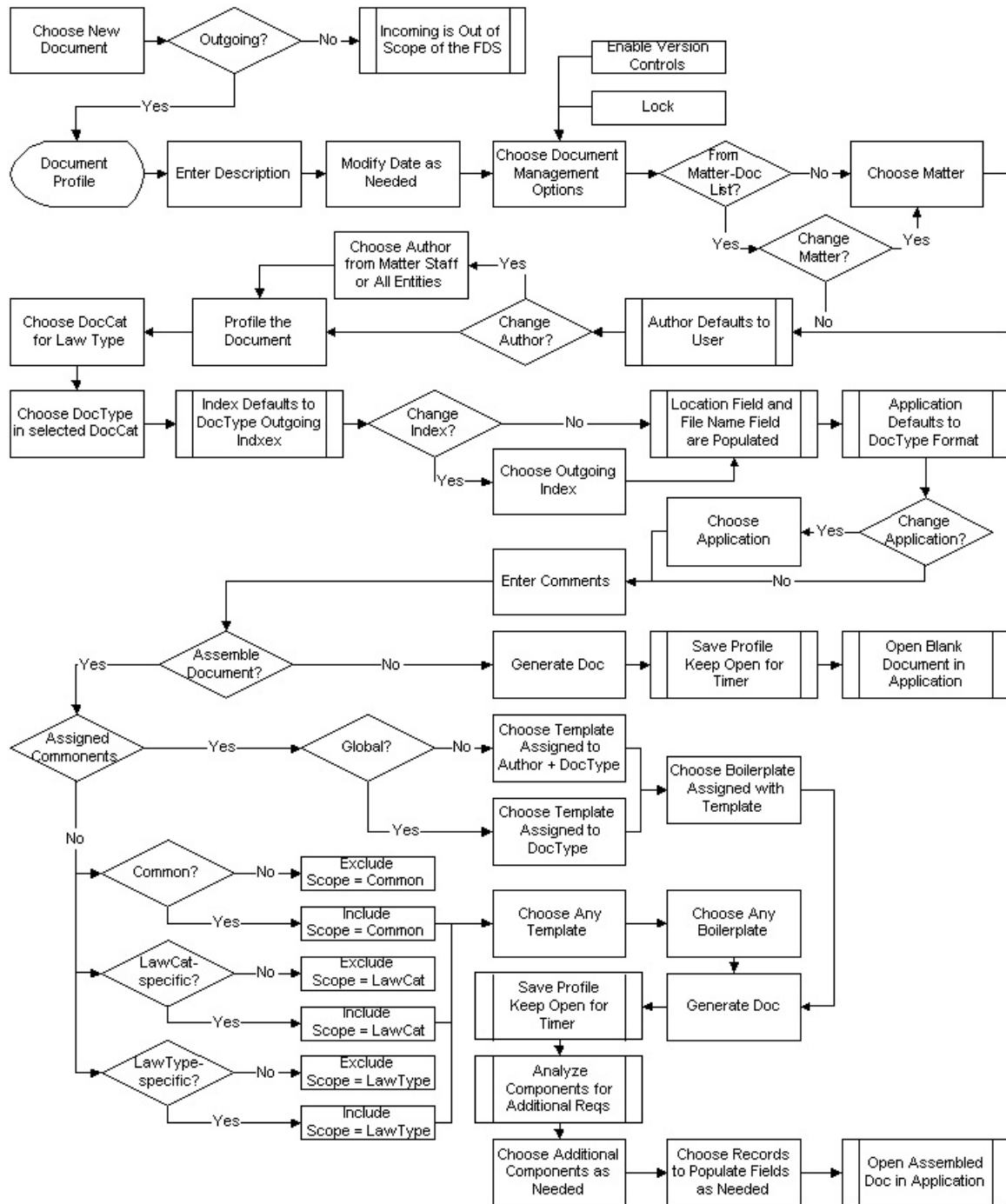


4.3. Document Assembly Settings – Assign Components – Hi-level Logic

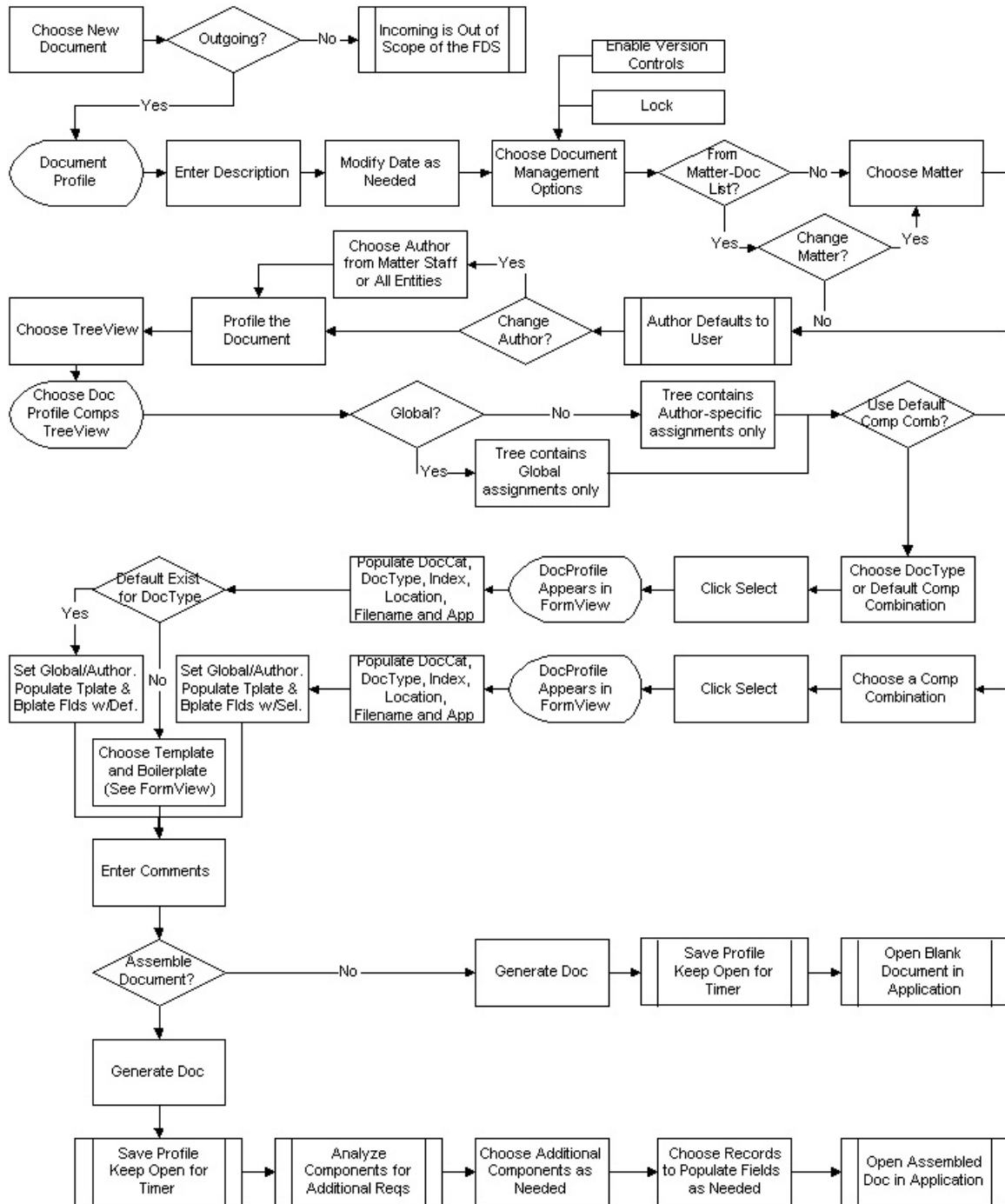


5. Document Management – Generate Document – Storyboards

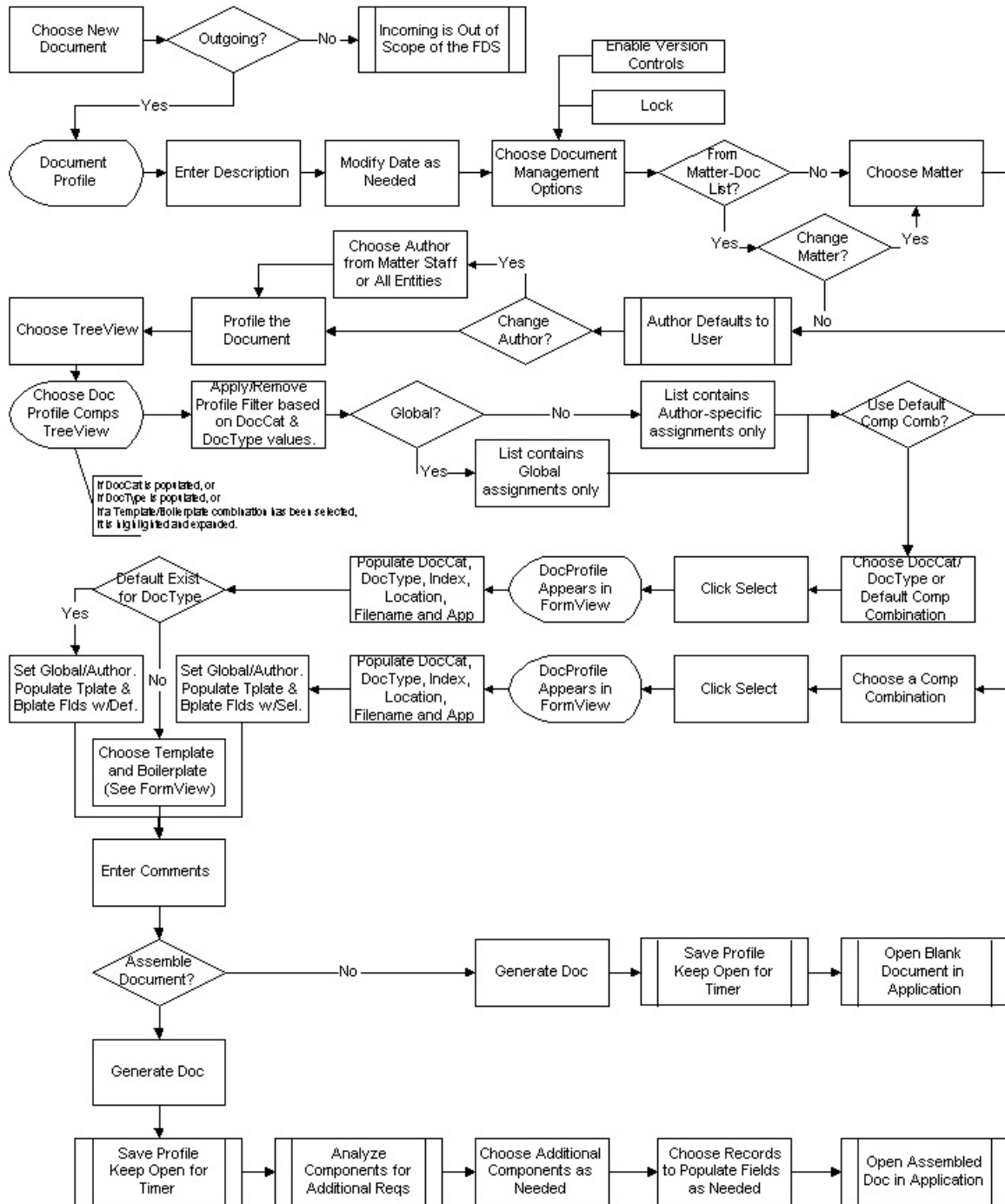
5.1. Generate Document – From FormView



5.2. Generate Document – From TreeView

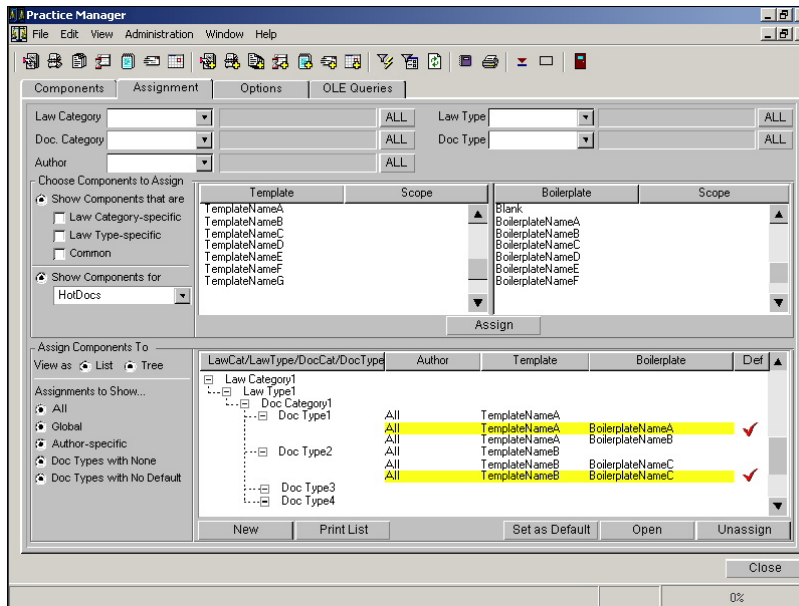


5.3. Generate Document – From ListView

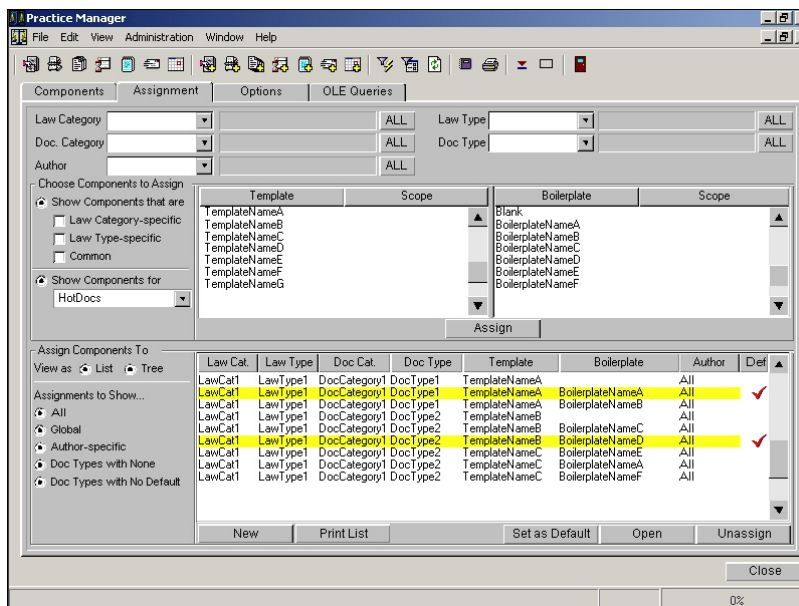


6. PM 8.5 Document Assembly and Document Management Screens

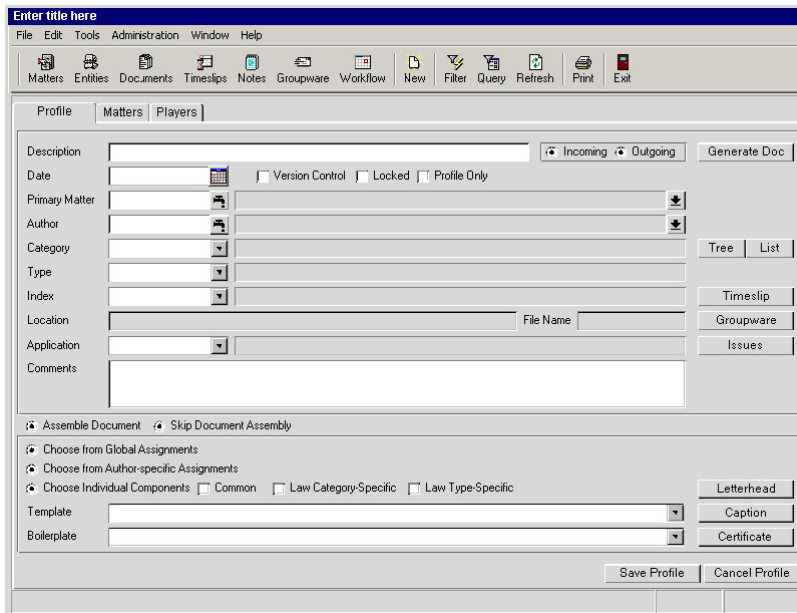
6.1. Document Assembly Settings – Assign Tab



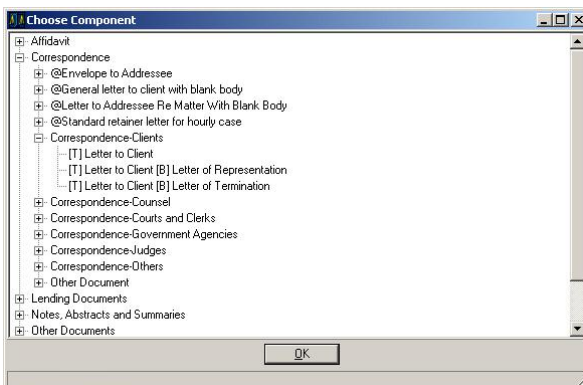
6.2. Document Assembly Settings – Report



6.3. Document Profile



6.4. Document Profile – Choose Component (Tree)



6.5. Document Profile – Template

Enter title here

File Edit Tools Administration Window Help

Matters Entities Documents Timeslips Notes Groupware Workflow New Filter Query Refresh Print Exit

Template Code _____ Description _____ Public

Description _____

Law Type _____ Version Control Locked Profile Only

Primary Matter _____

Author _____

Category _____

Type _____

Index _____

Location _____

Application _____

Comments _____

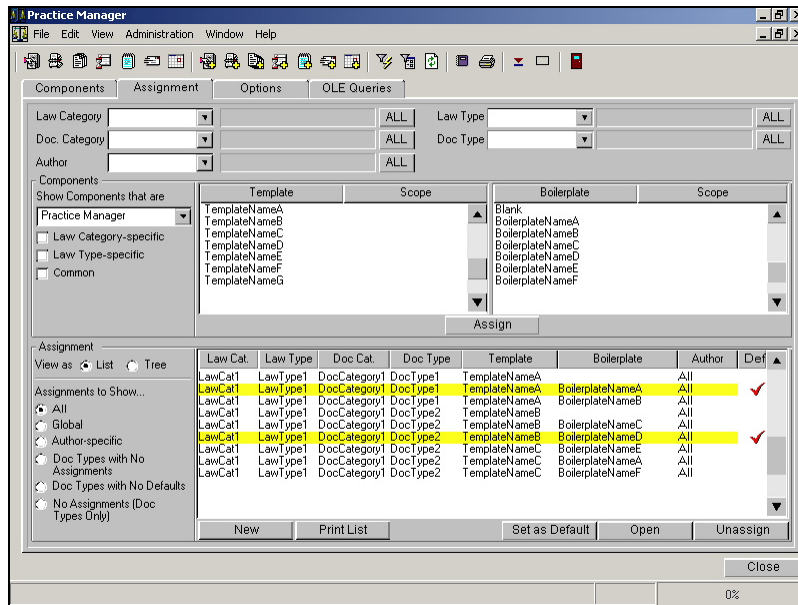
Assemble Document Skip Document Assembly Optional

Choose from Global Assignments
 Choose from Author-specific Assignments
 Choose Individual Components Common Law Category-Specific Law Type-Specific

Template _____
Boilerplate _____

7. Document Assembly Mockups

7.1. Document Assembly Assignment Page – FormView



General	Description
Help ID	pm.docassm.assignment
Title	Document Assembly Settings – Assignment
Usage	This tab is used to assign components to document types.
Type	Tab
Open Focus	Law Category Look-up Field
Tab Order	<ol style="list-style-type: none"> 1. Law Category 2. Law Category – ALL 3. Law Type 4. Law Type ALL 5. Doc Category 6. Doc Category – ALL 7. Doc Type 8. Doc Type – ALL

General	Description
	<ol style="list-style-type: none"> 9. Author Look-up 10. Author ALL 11. Show Components that are – lookup field 12. Show Components that are – Law Category-specific 13. Show Components that are – Law Type-specific 14. Show Components that are – Common 15. Templates 16. Boilerplates 17. View As – List 18. View As – Tree 19. Assignments to show... All 20. Assignments to show... Global 21. Assignments to show... Author-specific 22. Assignments to show... Doc Types with No Assignments 23. Assignments to show... Doc Types w/o Defaults 24. Assignments to show... No Assignments (Doc Types Only) 25. Assignment Listing 26. New 27. Print List 28. Set as Default 29. Open 30. Unassign 31. Close
Use Cases	9.1.1 Assign Components in ListView 9.1.4 Unassign Components

Buttons	Function / Action	Help ID
Law Category – ALL	When selected, makes assignment across all law categories.	pm.docassm.assignment.lawcat.all
Law Type – ALL	When selected, makes assignment across all law types.	pm.docassm.assignment.lawtype.all
Document Category – ALL	When selected, makes assignment across all document categories.	pm.docassm.assignment.doccat.all

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Buttons	Function / Action	Help ID
Document Type – ALL	When selected, makes assignment across all document types.	pm.docassm.assignment.doctype.all
Author – ALL	When selected, assignments are not author-specific.	pm.docassm.assignment.author.all
Assign	Assigns the selected components in combinations to the selected Document Type. This button is not activated until a template is selected.	pm.docassm.assignment.assignment
New	Create a new assignment by opening up the Assignment Properties window.	pm.docassm.assignment.new
Print List	Prints the Assignment List as filtered.	pm.docassm.assignment.printlists

Buttons	Function / Action	Help ID
Set as Default	Sets the highlight component combination as the default for the document type assignment. This button is activated when a component combination is selected.	pm.docassm.assignment.default
Open	Opens the Assignment Properties window. This button is activated when a component combination is selected.	pm.docassm.assignment.open
Unassign	Unassigns the selected component combinations.	pm.docassm.assignment.unassign
Close	Closes the window.	

Rules and Clarifications	
1.	Law Category - ALL: If ALL is selected, the component listing and the assignment listing will ignore Law Category as a filter.
2.	Law Category - Selected: If a Law Category is selected, the component listing and the assignment listing will be filtered by the selected Law Category.
3.	Law Type - ALL: If ALL is selected, the component listing and the assignment listing will ignore Law Type as a filter.
4.	Law Type - Selected: If a Law Type is selected, the component listing and the assignment listing will be filtered by the selected Law Type.
5.	Doc Category - ALL: If ALL is selected, the component listing and the assignment listing will ignore Document Category as a filter.
6.	Doc Category - Selected: If a Document Category is selected, the component listing and the assignment listing will be filtered by the selected Document Category.
7.	Doc Type - ALL: If ALL is selected, the component listing and the assignment listing will ignore Document Type as a filter.
8.	Doc Type - Selected: If a Document Type is selected, the component listing and the assignment listing will be filtered by the selected Document Type.
9.	Author - ALL: If ALL is selected, assignments will not be author-specific.
10.	Author - Selected: If an author is selected, all assignments will be author-specific.
11.	Show Components that are – Law Category-specific: If ALL Law Categories is selected, component lists will include all components that have been created for all Law Categories. If a specific Law Category is selected, the component lists will only include components created for that Law Category.
12.	Show Components that are – Law Type-specific: If ALL Law Types is selected, component lists will include all components that have been created for all Law Types. If a specific Law Type is selected, the component lists will only include components created for that Law Type.
13.	Show Components that are – Common: The component lists include components created for common use.
14.	At least one template has to be selected in order for the Assign button to be activated.
15.	More than one template and/or boilerplate can be selected for assignment at one time.
16.	If one template is selected and more than one boilerplate is selected, the assignment will be every combination of template and boilerplate. For example, if one template is selected and four boilerplates, four component combinations will be assigned to each document types selected.
17.	If more than one template is selected and more than one boilerplate is selected, the assignment will be every combination of template and boilerplate. For example, if three templates are selected and six boilerplates, eighteen component combinations will be assigned to each document type selected.

Rules and Clarifications
18. The listing includes all document type assignments, regardless of whether or not there is a component combination assigned to it or not. This allows the user to see exactly what document types the assignment will be made to.
19. The listing can be sorted by any of the columns.
20. The listing can be filtered by any of the columns.
21. More than one assignment can be selected from the listing.
22. Filtering is also carried out by the selection at the top of the window. As selections are made, all lists should be filtered.
23. For Assignments to show... If All is selected, the list contains all assignments. If Global is selected, the list contains only global (non author-specific) assignments. If Author-specific is selected, the list contains only author-specific assignments. If Doc Types with No Assignments is selected, the list does not displays any assignments, just document types that have no assignment. If Doc Types with No Default is selected, the list only displays document types that have assignments, but one has not been selected as the default. If No Assignments (Doc Types Only) is selected, the list only displays document types.

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Law Category	This is the Law Category of the document type assignments that will be impacted by the component combination assignment. If ALL is selected, Law Category is ignored as a filter on the remaining lists and in assignment.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.lawcat
Law Type	This is the Law Type of the document type assignments that will be impacted by the component combination assignment. If ALL is selected, Law Type is ignored as a filter on the remaining lists and in assignment.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.lawtype
Doc Category	This is the Document Category of the document type assignments that will be impacted by the component combination assignment. If ALL is selected, Document Category is ignored as a filter on the remaining lists and in assignment.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.doccat
Doc Type	This is the Document Type that will receive the component combination assignment. If ALL is selected, the assignment will be for all document types as filtered by the Document Category, Law Type, and Law Category.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.doctype
Author	This is the author to which specific assignments would be made. If ALL is selected, assignments are not author-specific.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.author

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Components					
Show Components that are -	Determines which Integration the assignments components are for. The current list is populated with Practice Manager and HotDocs. If Practice Manager is selected, the Templates and Boilerplates list are populated with Practice Manager components. If HotDocs is selected, the Templates list is populated with HotDocs Templates and the Boilerplates list is disabled.	Drop-down List	YES	NA	pm.docassm.assignment.show.compsource
Show Components that are - Law Category-specific	If selected, the components list is filtered to only show components that are of the selected Law Category. If ALL is selected for Law Category, this field is not applicable.	Checkbox	NO	NA	pm.docassm.assignment.show.lawcat
Show Components that are - Law Type-specific	If selected, the components list is filtered to only show components that are of the selected Law Type. If ALL is selected for Law Type, this field is not applicable.	Checkbox	NO	NA	pm.docassm.assignment.show.lawtype
Show Components that are - Common	If selected, the components list is filtered to includes components that are common.	Checkbox	NO	NA	pm.docassm.assignment.show.common
Templates	This is a list of available templates for assignment. It is filtered, as applicable, by the selections in the Law Category, Law Type, and Show fields. It is NOT filtered by those assignments which have already been made (this is because assignment now append instead of overwrite).	Description List	YES for assignment	NA	pm.docassm.assignment.templates
Boilerplates	This is a list of available boilerplates. It is filtered, as applicable, by the selections in the Law Category, Law Type, and Show fields. It is NOT filtered by those assignments which have already been made (this is because assignment now append instead of overwrite).	Description List	NA	NA	pm.docassm.assignment.boilerplates
Assignment					
View As... List	Displays the assignments in List View.	Option Button	NA	NA	pm.docassm.assignment.viewaslist
View As... Tree	Displays the assignments in Tree View.	Option Button	NA	NA	pm.docassm.assignment.viewastree

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

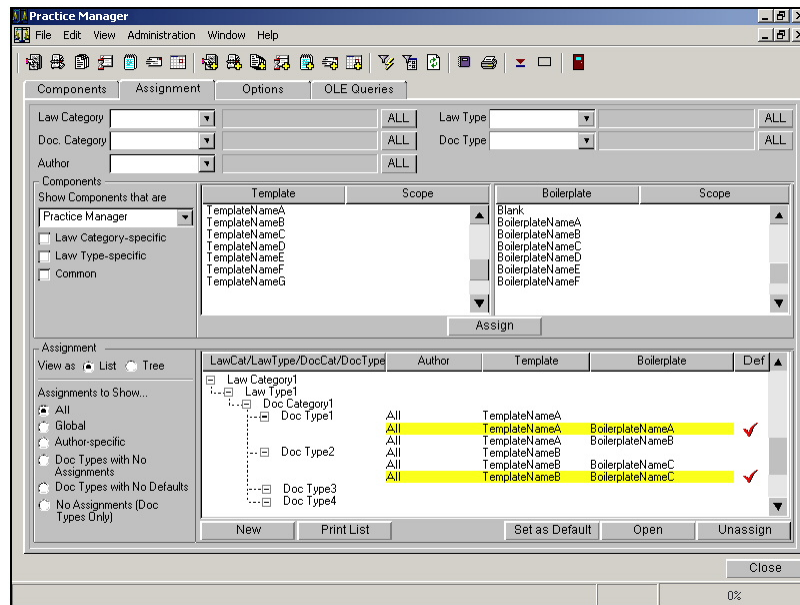
Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Assignments to show... All	If All is selected, the list contains all assignments.	Option Button with the For Assignments to show... set. This is the default selection for these five options.	NA	NA	Assignmentstoshow.All
Assignments to show... Global	If Global is selected, the list contains only global (non author-specific) assignments.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.Global
Assignments to show... Author-specific	If Author-speciifc is selected, the list contains only author-specific assignments.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.Authorspecific
Assignments to show... Doc Types with No Assignments	If Assignments to show... Doc Types with No Assignments is selected, the list does not displays any assignments, just document types that have no assignment.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.DocTypeswithNone
Assignments to show... Doc Types with No Default	If Doc Types with No Default is selected, the list only displays document types that have assignments, but one has not been selected as the default.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.DocTypeswithNoDefault
No Assignments (Doc Types Only)	If No Assignments (Doc Types Only) is selected, the list only displays document types.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.DocTypesOnly

Column Heading	Definition	Help ID
Law Category	This is the Law Category of the document type assignment.	pm.docassm.assignment.list.lawcat
Law Type	This is the Law Type of the document type assignment.	pm.docassm.assignment.list.lawtype
Doc Category	This is the Document Category of the document type assignment.	pm.docassm.assignment.list.doccat
Doc Type	This is the Document Type for the component combination assignment.	pm.docassm.assignment.list.doctype
Author	This is the author for author-specific assignments. If ALL is selected, author is ignored.	pm.docassm.assignment.list.author
Template	This is the template in the combination assigned to the document type.	pm.docassm.assignment.list.template
Boilerplate	This is the boilerplate in the combination assigned to the document type.	pm.docassm.assignment.list.boilerplate
Def	This indicates if the component combination is the default combination for the document type. The list contains a checkmark, and the line is highlighted in yellow.	pm.docassm.assignment.list.default.

Revision No.	Revision Date	Revised By	Revision Description
01	04/26/2001	TAF	Modified List Filters to be radio buttons instead of checkbox.

Revision No.	Revision Date	Revised By	Revision Description
02	05/11/2001	TAF	Changed "Assignments to show... Doc Types with None" to "Assignments to show... Doc Types with No Assignments". Added "No Assignments (Doc Types Only)". Modified "Show Components that are".

7.2. New Document Assembly Assignment Page – TreeView



General	Description
	11. Show Components that are – lookup field 12. Show Components that are – Law Category-specific 13. Show Components that are – Law Type-specific 14. Show Components that are – Common 15. Templates 16. Boilerplates 17. View As – List 18. View As – Tree 19. Assignments to show... All 20. Assignments to show... Global 21. Assignments to show... Author-specific 22. Assignments to show... Doc Types with No Assignments 23. Assignments to show... Doc Types w/o Defaults 24. Assignments to show... No Assignments (Doc Types Only) 25. Assignment Tree 26. New 27. Print List 28. Set as Default 29. Open 30. Unassign
Use Cases	9.1.2 Assign Components in TreeView 9.1.4 Unassign Components

General	Description
Help ID	pm.docassm.assignment
Title	Document Assembly Settings – Assignment
Usage	This tab is used to assign components to document types.
Type	Tab
Open Focus	Law Category Look-up Field
Tab Order	1. Law Category 2. Law Category – ALL 3. Law Type 4. Law Type ALL 5. Doc Category 6. Doc Category – ALL 7. Doc Type 8. Doc Type – ALL 9. Author Look-up 10. Author ALL

Buttons	Function / Action	Help ID
Law Category – ALL	When selected, makes assignment across all law categories.	pm.docassm.assignment.lawcat.all
Law Type – ALL	When selected, makes assignment across all law types.	pm.docassm.assignment.lawtype.all
Document Category – ALL	When selected, makes assignment across all document categories.	pm.docassm.assignment.doccat.all
Document Type – ALL	When selected, makes assignment across all document types.	pm.docassm.assignment.doctype.all
Author – ALL	When selected, assignments are not author-specific.	pm.docassm.assignment.author.all

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Buttons	Function / Action	Help ID
Assign	Assigns the selected components in combinations to the selected Document Type. This button is not activated until a template is selected.	pm.docassm.assignment.assignment
New	Create a new assignment by opening up the Assignment Properties window.	pm.docassm.assignment.new
Print List	Prints the Assignment List as filtered.	pm.docassm.assignment.printlists

Buttons	Function / Action	Help ID
Set as Default	Sets the highlight component combination as the default for the document type assignment. This button is activated when a component combination is selected.	pm.docassm.assignment.default
Open	Opens the Assignment Properties window. This button is activated when a component combination is selected.	pm.docassm.assignment.open
Unassign	Unassigns the selected component combinations.	pm.docassm.assignment.unassign
Close	Closes the window.	pm.docassm.close

Rules and Clarifications
1. Law Category - ALL: If ALL is selected, the component listing and the assignment tree will ignore Law Category as a filter.
2. Law Category - Selected: If a Law Category is selected, the component listing and the assignment tree will be filtered by the selected Law Category.
3. Law Type - ALL: If ALL is selected, the component listing and the assignment tree will ignore Law Type as a filter.
4. Law Type - Selected: If a Law Type is selected, the component listing and the assignment tree will be filtered by the selected Law Type.
5. Doc Category - ALL: If ALL is selected, the component listing and the assignment tree will ignore Document Category as a filter.
6. Doc Category - Selected: If a Document Category is selected, the component listing and the assignment tree will be filtered by the selected Document Category.
7. Doc Type - ALL: If ALL is selected, the component listing and the assignment tree will ignore Document Type as a filter.
8. Doc Type - Selected: If a Document Type is selected, the component listing and the assignment tree will be filtered by the selected Document Type.
9. Author - ALL: If ALL is selected, assignments will not be author-specific.
10. Author - Selected: If an author is selected, all assignments will be author-specific.
11. Show Components that are – Law Category-specific: If ALL Law Categories is selected, component lists will include all components that have been created for all Law Categories. If a specific Law Category is selected, the component lists will only include components created for that Law Category.
12. Show Components that are – Law Type-specific: If ALL Law Types is selected, component lists will include all components that have been created for all Law Types. If a specific Law Type is selected, the component lists will only include components created for that Law Type.
13. Show Components that are – Common: The component lists include components created for common use.
14. At least one template has to be selected in order for the Assign button to be activated.
15. More than one template and/or boilerplate can be selected for assignment at one time.
16. If one template is selected and more than one boilerplate is selected, the assignment will be every combination of template and boilerplate. For example, if one template is selected and four boilerplates, four component combinations will be assigned to each document types selected.
17. If more than one template is selected and more than one boilerplate is selected, the assignment will be every combination of template and boilerplate. For example, if three templates are selected and six boilerplates, eighteen component combinations will be assigned to each document type selected.
18. More than one assignment can be selected from the listing.
19. The tree includes all document type assignments, regardless of whether or not there is a component combination assigned to it or not. This allows the user to see exactly what document types the assignment will be made to.

Rules and Clarifications
20. The tree cannot be sorted.
21. The tree can be filtered by any of the columns.
22. More than one assignment can be selected from the tree.
23. Filtering is also carried out by the selection at the top of the window. As selections are made, the tree should be filtered.
24. For Assignments to show... If All is selected, the list contains all assignments. If Global is selected, the list contains only global (non author-specific) assignments. If Author-specific is selected, the list contains only author-specific assignments. If Doc Types with No Assignments is selected, the list does not displays any assignments, just document types that have no assignment. If Doc Types with No Default is selected, the list only displays document types that have assignments, but one has not been selected as the default. If No Assignments (Doc Types Only) is selected, the list only displays document types.

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Law Category	This is the Law Category of the document type assignments that will be impacted by the component combination assignment. If ALL is selected, Law Category is ignored as a filter on the remaining lists and in assignment.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.lawca t
Law Type	This is the Law Type of the document type assignments that will be impacted by the component combination assignment. If ALL is selected, Law Type is ignored as a filter on the remaining lists and in assignment.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.lawty pe
Doc Category	This is the Document Category of the document type assignments that will be impacted by the component combination assignment. If ALL is selected, Document Category is ignored as a filter on the remaining lists and in assignment.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.docca t
Doc Type	This is the Document Type that will receive the component combination assignment. If ALL is selected, the assignment will be for all document types as filtered by the Document Category, Law Type, and Law Category.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.docty pe
Author	This is the author to which specific assignments would be made. If ALL is selected, assignments are not author-specific.	The drop-down list is the 8-character code. The second field is the read-only description.	YES	NA	pm.docassm.assignment.autho r

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Components					
Show Components that are -	Determines which Integration the assignments coimponents are for. The current list is populated with Practice Manager and HotDocs. If Practice Manager is selected, the Templates and Boilerplates list are populated with Practice Manager components. If HotDocs is selected, the Templates list is populated with HotDocs Templates and the Boilerplates list is disabled.	Drop-down List	YES	NA	pm.docassm.assignment.show.compsource
Show Components that are - Law Category-specific	If selected, the components list is filtered to only show components that are of the selected Law Category. If ALL is selected for Law Category, this field is not applicable.	Checkbox	NO	NA	pm.docassm.assignment.show.lawcat
Show Components that are - Law Type-specific	If selected, the components list is filtered to only show components that are of the selected Law Type. If ALL is selected for Law Type, this field is not applicable.	Checkbox	NO	NA	pm.docassm.assignment.show.lawtype
Show Components that are - Common	If selected, the components list is filtered to includes components that are common.	Checkbox	NO	NA	pm.docassm.assignment.show.common
Templates	This is a list of available templates for assignment. It is filtered, as applicable, by the selections in the Law Category, Law Type, and Show fields. It is NOT filtered by those assignments which have already been made (this is because assignment now append instead of overwrite).	Description List	YES for assignment	NA	pm.docassm.assignment.templates
Boilerplates	This is a list of available boilerplates. It is filtered, as applicable, by the selections in the Law Category, Law Type, and Show fields. It is NOT filtered by those assignments which have already been made (this is because assignment now append instead of overwrite).	Description List	NA	NA	pm.docassm.assignment.boilerplates
Assignment					
View As... List	Displays the assignments in List View.	Option Button	NA	NA	pm.docassm.assignment.viewaslist
View As... Tree	Displays the assignments in Tree View.	Option Button	NA	NA	pm.docassm.assignment.viewastree

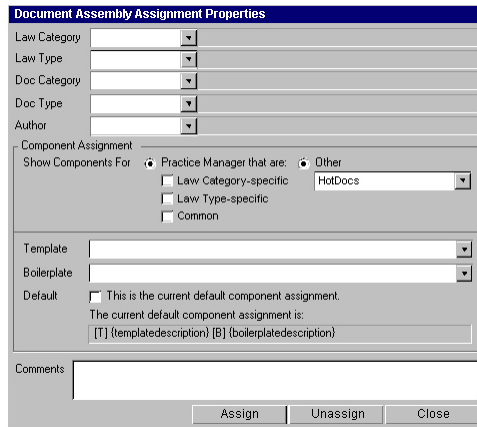
RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Assignments to show... All	If All is selected, the tree contains all assignments.	Option Button with the For Assignments to show... set. This is the default selection for these five options.	NA	NA	Assignmentstoshow.All
Assignments to show... Global	If Global is selected, the tree contains only global (non author-specific) assignments.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.Global
Assignments to show... Author-specific	If Author-specific is selected, the tree contains only author-specific assignments.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.Authorspecific
Assignments to show... Doc Types with No Assignments	If Assignments to show... Doc Types with No Assignments is selected, the list does not display any assignments, just document types that have no assignment.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.DocTypeswithNone
Assignments to show... Doc Types with No Default	If Doc Types with No Default is selected, the list only displays document types that have assignments, but one has not been selected as the default.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.DocTypeswithNoDefault
No Assignments (Doc Types Only)	If No Assignments (Doc Types Only) is selected, the list only displays document types.	Option Button with the For Assignments to show... set.	NA	NA	Assignmentstoshow.DocTypesOnly

Column Heading	Definition	Help ID
LawCat/LawType/DocCat/DocType	This is the Law Category, Law Type, Document Category and Document Type for assignment.	pm.docassm.assignment.tree
Author	This is the author for author-specific assignments. If ALL is selected, author is ignored.	pm.docassm.assignment.tree.author
Template	This is the template in the combination assigned to the document type.	pm.docassm.assignment.tree.template
Boilerplate	This is the boilerplate in the combination assigned to the document type.	pm.docassm.assignment.tree.boilerplate
Def	This indicates if the component combination is the default combination for the document type. The list contains a checkmark, and the line is highlighted in yellow.	pm.docassm.assignment.tree.default

Revision No.	Revision Date	Revised By	Revision Description
01	04/26/2001	TAF	Modified Tree Filters to be radio buttons instead of checkbox.
02	05/11/2001	TAF	Changed "Assignments to show... Doc Types with None" to "Assignments to show... Doc Types with No Assignments". Added "No Assignments (Doc Types Only)". Modified "Show Components that are".

7.3. New Document Assembly Assignment – Properties Window



General	Description
Help ID	pm.docassm.assignment.properties
Title	Document Assembly Assignment Properties
Usage	This window is used to view the details of a specific document assembly assignment, as well as create new assignments.
Type	Non-modal window
Open Focus	Law Category Drop-down field
Tab Order	1. Law Category look-up 2. Law Type look-up 3. Document Category look-up 4. Document Type look-up 5. Author look-up 6. PM Template 7. Other

General	Description
	8. Other drop-down list 9. Template 10. Boilerplate 11. Default 12. Comments 13. Assign 14. Unassign 15. Close
Use Cases	9.1.3 Assign Components in FormView 9.1.4 Unassign Components

Buttons	Function / Action	Help ID
Assign	Assigns the selected component combination to the Law Category/Law Type/Document Category/Document Type/Author. The window remain open.	pm.docassm.assignment.properties.assign
Unassign	Unassigns the selected component combination to the Law Category/Law Type/Document Category/Document Type/Author. The window remain open.	pm.docassm.assignment.properties.unassign
Close	Closes the window.	pm.docassm.assignment.properties.close

Rules and Clarifications
1. If an existing assignment is opened, the Assign button is disabled and the Unassign button is enabled. 2. When the Law Category, Law Type, Document Category, Document, Author, Template fields have been populated, the system checks to see if an existing assignment matches the selections. If no, the Assign button is enabled. If yes, the Unassign button is enabled. 3. If this is the Default assignment, that field is automatically checked. 4. The assignment would be template only. 5. The unassignment would be template only.

Rules and Clarifications	
6.	When the Law Category, Law Type, Document Category, Document, Author, Template and Boilerplate fields have been populated, the system checks to see if an existing assignment matches the selections. If no, the Assign button is enabled. If yes, the Unassign button is enabled.
7.	If this is the Default assignment, that field is automatically checked.
8.	If the Law Category, Law Type, Document Category, Document and Author assignment as a default component combination other than the one displays, and the Default... field is selected, a dialog box

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Law Category	This is the Law Category of the assignment.	Look-up	Yes	Yes	pm.docassm.assignment.properties LawCategory
Law Type	This is the Law Type from the selected Law Category of the component assignment.	Look-up on Law Types of the selected Law Category.	Yes	Yes	pm.docassm.assignment.properties LawType
Document Category	This is the Document Category of the Document Type assigned to the Law Type of the component assignment.	Look-up on Document Categories if Document Types assigned to the selected Law Type.	Yes	Yes	pm.docassm.assignment.properties DocumentCategory
Document Type	This is the Document Type assigned to the Law Type of the component assignment.	Look-up on Document Types assigned to the selected Law Type.	Yes	Yes	pm.docassm.assignment.properties DocumentType
Author	This is the Author for an author-specific assignment.	Look-up on entities that are personnel.	No	No	pm.docassm.assignment.properties Author
Show Components for – Practice Manager that are	Clicking this option displays components that are created for Practice Manager Document Assembly	Option with Other	No	NA	pm.docassm.assignment.properties pm.docassm.assignment.properties ShowComponentsforPracticeManagerthatare
Show Components for – Practice Manager that are – Law Category-specific	Clicking this option displays Practice Manager Document Assembly components that are Law Category-specific.	Checkbox	No	NA	pm.docassm.assignment.properties ShowComponentsforPracticeManagerthatareLawCategoryspecific
Show Components for – Practice Manager that are – Law Type-specific	Clicking this option displays Practice Manager Document Assembly components that are Law Type-specific.	Checkbox	No	NA	pm.docassm.assignment.properties ShowComponentsforPracticeManagerthatareLawTypespecific
Show Components for – Practice Manager that are – Common	Clicking this option displays Practice Manager Document Assembly components that are Common.	Checkbox	No	NA	pm.docassm.assignment.properties ShowComponentsforPracticeManagerthatareCommon
Show Components for – Other	Clicking this option displays components that are created for another Document Assembly program.	Option with Practice Manager	No	NA	pm.docassm.assignment.properties ShowComponentsforOther

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Field Label	Definition	Properties	UI Req'd	db Req'd	Help ID
Show Components for – Other (lookup)	This is a look-up on document assembly engines currently supported by Practice Manager.	Look-up	No	NA	pm.docassm.assignment.properties ShowComponentsforOtherLookup
Template	This is the assigned template.	Lookup on Templates	Yes	Yes	pm.docassm.assignment.properties Template
Boilerplate	This is the assigned template.	Lookup on Boilerplates	No	No	pm.docassm.assignment.properties Boilerplate
Default	This indicates if the assignment is the default assignment for the Document Type.	Checkbox	No	No	pm.docassm.assignment.properties Default
Comments	This is a field for entering comments about the assignment.	Text field.	No	No	pm.docassm.assignment.properties Comments

Revision No.	Revision Date	Revised By	Revision Description

8. Document Management Mockups

8.1. Document Profile – New

General	Description
Help ID	Document.Profile
Title	Document – Profile
Usage	Define a New Document
Type	Data Entry
Open Focus	Description
Tab Order	1. Description 2. Incoming, if enabled 3. Outgoing, if enabled 4. Date 5. Version Control 6. Locked 7. Profile Only, if enabled

General	Description
	8. Primary Matter 9. Primary Matter – Faucet 10. Primary Matter – Cowboy Hat 11. Author 12. Author – Faucet 13. Author – Cowboy Hat 14. Category 15. Type 16. Index 17. Application 18. Comments 19. Assemble Document 20. Skip Document Assembly 21. Choose from Global Assignments 22. Choose from Author-specific Assignments 23. Choose from Individual Components 24. Common 25. Law Category-specific 26. Law Type-specific 27. Template 28. Boilerplate 29. Generate Doc 30. Tree 31. List 32. Timeslip 33. Groupware 34. Issues 35. Letterhead 36. Caption 37. Certificate 38. Save Profile 39. Cancel Profile
Use Cases	9.2.1 Generate Outgoing Documents in FormView

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Buttons	Function / Action	Help ID
Calendar	Displays a one month calendar, focused on the current month, from which the user can select a document date.	Document.Profile.Calendar
Primary Matter Faucet	This is a look-up on the user's (MY) matters.	Document.Profile.PrimaryMatterFaucet
Author Faucet	This is a look-up on the Personnel in the matter.	Document.Profile.AuthorFaucet
Generate Doc	When clicked, generates and/or opens the document in the selected application.	Document.Profile.GenerateDoc
Tree	Displays a window from which user can populate the fields from Category through Boilerplate by selecting a value from a tree.	Document.Profile.Tree
List	Displays a window from which user can populate the fields from Category through Boilerplate by selecting a value from a list.	Document.Profile.List
Timeslip	Allows the user to create a timeslip for the document.	Document.Profile.Timeslip
Groupware	Allows the user to generate a Groupware item for the document.	Document.Profile.Groupware
Issues	Allows the user to assign issues to the document.	Document.Profile.Issues

Buttons	Function / Action	Help ID
Letterhead	Enabled if the template or boilerplate includes a letterhead component. Allows the user to select a letterhead for use in assembling the document. If no letterhead is selected manually, the user will be prompted to pick one after clicking Generate Doc.	Document.Profile.Letterhead
Caption	Enabled if the template or boilerplate includes a caption component. Allows the user to select a caption for use in assembling the document. If no caption is selected manually, the user will be prompted to pick one after clicking Generate Doc.	Document.Profile.Caption
Certificate	Enabled if the template or boilerplate includes a certificate component. Allows the user to select a certificate for use in assembling the document. If no certificate is selected manually, the user will be prompted to pick one after clicking Generate Doc.	Document.Profile.Certificate
Save Profile	Saves the profile without closing the window or generating the document.	Document.Profile.SaveProfile
Cancel Profile	Cancels creating the document and/or document profile.	Document.Profile.CancelProfile

Rules and Clarifications
1. Incoming/Outgoing are disabled, as they are populated from the selection on the New Document Is dialog box.
2. Profile only is disabled, as it is populated from the selection on the New Document Is dialog box.
3. Date is populated with the computer's system date.
4. If the document is created from the Matter-Document listing, the Primary field is pre-populated with that matter.
5. If the document is created outside of a matter, no other fields can be completed until the Primary Matter field is populated.
6. The Author field is pre-populated with the user.
7. The Author Faucet looks to Personnel in the Primary Matter.
8. The Author Cowboy Hat is a lookup to Entity Listing.
9. Category is a look-up on the Document Categories for Document Types assigned to the Law Type of the Primary Matter.
10. Type is a look-up to Document Types assigned to the Law Type of the Primary Matter.
11. Index defaults to the Document Type's index.
12. Application defaults to the Document Type's index.

Rules and Clarifications
13. If Skip Document Assembly is selected, all remaining fields are disabled.
14. If the Document Type has a default document assembly assigned, the Template and Boilerplate fields are populated accordingly.
15. If Choose from Global Assignments is selected, the Template looks up to templates assigned to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.
16. If Choose from Author-specific Assignments is selected, the Template looks up to templates assigned for the author to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.
17. If Choose from Individual Components is selected, the Common, Law Category-specific and Law Type-specific fields are enabled, and are filters to be applied to the Template and Boilerplate lookups (the default is for all to be selected). Template and Boilerplate are now independent lookups.

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Description	This is the description of the document.	Text	Y	Y	Document.Profile.Description
Incoming	This indicates if the document is incoming.	Radio button with Outgoing (See Rules and Clarifications)	Y	Y	Document.Profile.Incoming
Outgoing	This indicates if the document is outgoing.	Radio button with Incoming (See Rules and Clarifications)	Y	Y	Document.Profile.Outgoing
Date	This is the document date.	Date (See Rules and Clarifications)	Y	Y	Document.Profile.Date
Version Control	If enabled, creates a new version of the last document version each time the document is opened.	Checkbox (See Rules and Clarifications)	N	N	Document.Profile.VersionControl
Locked	If enabled, locks the document and profile from editing.	Checkbox (See Rules and Clarifications)	N	N	Document.Profile.Locked
Profile Only	Indicates there is no file associated with the profile.	Checkbox (See Rules and Clarifications)	N	N	Document.Profile.ProfileOnly
Primary Matter (Number and Matter Search Name)	This is the primary matter for the document. The Law Type and Entity list for the matter is used to populate fields in the profile.	Combination Look-up (See Rules and Clarifications)	Y	Y	Document.Profile.PrimaryMatter
Author (Code and Name)	This is the author of the document.	Combination Look-up (See Rules and Clarifications)	Y	Y	Document.Profile.Author
Category (Code and Description)	This is the category of the document. It is a look-up on the Document Categories for Document Types assigned to the Law Type of the Primary Matter.	Pre-filtered Drop-down List (See Rules and Clarifications)	Y	Y	Document.Profile.Category
Type (Code and Description)	This is the type of document. It is a look-up to Document Types assigned to the Law Type of the Primary Matter in the selected Document Category.	Pre-filtered Drop-down List (See Rules and Clarifications)	Y	Y	Document.Profile.Type
Index (Code and Description)	This is the index where the document will be located. It defaults to the Document Type's index.	Pre-filtered Drop-down List (See Rules and Clarifications)	Y	Y	Document.Profile.Index
Location	This is the full path where the document file will be stored.	Read Only Text	N	N	Document.Profile.Location

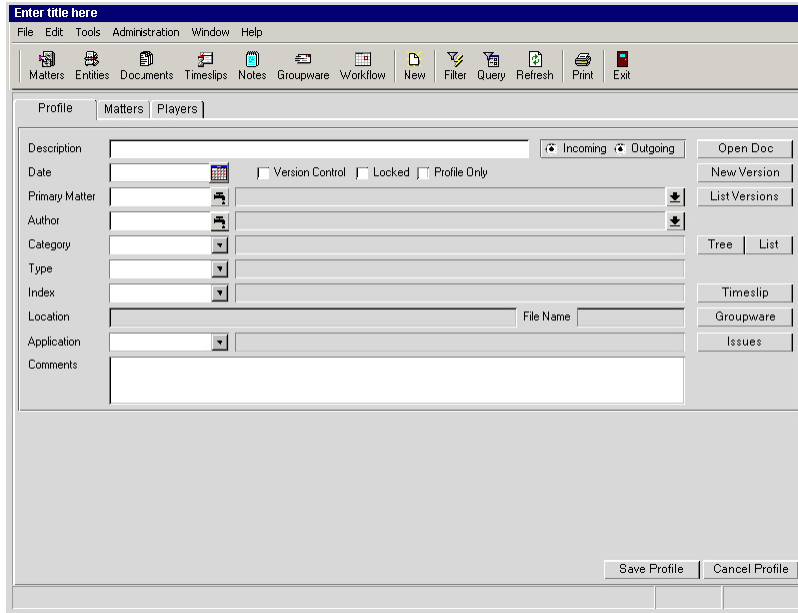
RealLegal, Inc. Confidential and Proprietary Information
Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Field Label	Definition	Properties	UI Req'd	db Req'd	Help ID
File Name	This is the name of the document file.	Read Only Text	N	N	Document.Profile.FileName
Application (Code and Description)	This is the application used to generate/open the document. It defaults to the application associated with the Document Type's format.	Pre-filtered Drop-down List (See Rules and Clarifications)	N	N	Document.Profile.Application
Comments	These are comments to associate with the document.	Text	N	N	Document.Profile.Comments
Assemble Document	If selected, the document will be assembled using selected components.	Radio button with Skip Document Assembly (See Rules and Clarifications)	N	NA	Document.Profile.AssembleDocument
Skip Document Assembly	If selected, the document will open as a blank file.	Radio button with Assemble Document (See Rules and Clarifications)	N	NA	Document.Profile.SkipDocumentAssembly
Choose from Global Assignments	If selected, the Template looks up to templates assigned to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.	Radio button with Choose from Author-specific Assignments and Choose from Individual Components (See Rules and Clarifications)	N	NA	Document.Profile.ChoosefromGlobalAssignments
Choose from Author-specific Assignments	If selected, the Template looks up to templates assigned for the author to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.	Radio button with Choose from Global Assignments and Choose from Individual Components (See Rules and Clarifications)	N	NA	Document.Profile.ChoosefromAuthorpecificAssignments
Choose from Individual Components	If selected, the Common, Law Category-specific and Law Type-specific fields are enabled, and are filters to be applied to the Template and Boilerplate lookups (the default is for all to be selected). Template and Boilerplate are now independent lookups.	Radio button with Choose from Global Assignments and Choose from Author-specific Assignments (See Rules and Clarifications)	N	NA	
Common	If selected, Common components are included in the template and boilerplate lookups.	Checkbox (See Rules and Clarifications)	N	NA	Document.Profile.Common
Law Category-specific	If selected, Law Category-specific components are included in the template and boilerplate lookups.	Checkbox (See Rules and Clarifications)	N	NA	Document.Profile.LawCategoryspecific
Law Type-specific	If selected, Law Type-specific components are included in the template and boilerplate lookups.	Checkbox (See Rules and Clarifications)	N	NA	Document.Profile.LawTypespecific
Template	This is a list of templates that are available for use in assembling the document. The values on the list are determined by the values in the following fields: 18. Choose from Global Assignments 19. Choose from Author-specific Assignments 20. Choose from Individual Components 21. Common 22. Law Category-specific 23. Law Type-specific	Pre-filtered Drop-down List (See Rules and Clarifications)	N	N	Document.Profile.Template

Field Label	Definition	Properties	UI Req'd	db Req'd	Help ID
Boilerplate	<p>This is a list of templates that are available for use in assembling the document.</p> <p>If Choose from Global Assignments or Choose from Author-specific Assignments is selected, the list of available boilerplates is limited to those assigned to the document type along with the selected template.</p> <p>If Choose from Individual Components is selected, the list of boilerplates is independent of the value in the template field, and is controlled by the values in the following fields.</p> <ul style="list-style-type: none"> 24. Common 25. Law Category-specific 26. Law Type-specific 	Pre-filtered Drop-down List (See Rules and Clarifications)	N	NN	Document.Profile.Boilerplate

Revision No.	Revision Date	Revised By	Revision Description

8.2. Document Profile – Edit



General	Description
	11. Author 12. Author – Faucet 13. Author – Cowboy Hat 14. Category 15. Type 16. Index 17. Application 18. Comments 19. Open Doc 20. New Version 21. Versions 22. Tree 23. List 24. Timeslip 25. Groupware 26. Issues 27. Save Profile 28. Cancel Profile
Use Cases	9.2.1 Generate Outgoing Documents in FormView

General	Description
Help ID	Document.Proffile
Title	Document – Profile
Usage	Edit and Existing Document Profile
Type	Data Entry
Open Focus	Description
Tab Order	1. Description 2. Incoming, if enabled 3. Outgoing, if enabled 4. Date 5. Version Control, if enabled 6. Locked, if enabled 7. Profile Only, if enabled 8. Primary Matter 9. Primary Matter – Faucet 10. Primary Matter – Cowboy Hat

Buttons	Function / Action	Help ID
Calendar	Displays a one month calendar, focused on the current month, from which the user can select a document date.	Document.Profile.Calendar
Primary Matter Faucet	This is a look-up on the user's (MY) matters.	Document.Profile.PrimaryMatterFaucet
Author Faucet	This is a look-up on the Personnel in the matter.	Document.Profile.AuthorFaucet
Open Doc	When clicked, opens the document defined by the profile. If Version Control is enabled, a copy of the file is opened and made the primary file.	Document.Profile.OpenDoc
New Version	Creates a new version of the document defined by the profile.	Document.Profile.NewVersion
List Versions	Lists previously created versions of the current document.	Document.Profile.NewVersion

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Buttons	Function / Action	Help ID
Tree	Displays a window from which user can populate the fields from Category through Boilerplate by selecting a value from a tree.	Document.Profile.Tree
List	Displays a window from which user can populate the fields from Category through Boilerplate by selecting a value from a list.	Document.Profile.List
Timeslip	Allows the user to create a timeslip for the document.	Document.Profile.Timeslip

Buttons	Function / Action	Help ID
Groupware	Allows the user to generate a Groupware item for the document.	Document.Profile.Groupware
Issues	Allows the user to assign issues to the document.	Document.Profile.Issues
Save Profile	Saves the profile without closing the window or generating the document.	Document.Profile.SaveProfile
Cancel Profile	Cancel creating the document and/or document profile.	Document.Profile.CancelProfile

Rules and Clarifications	
1.	Incoming/Outgoing are disabled, as they are populated from the selection on the New Document Is dialog box.
2.	Profile only is disabled, as it is populated from the selection on the New Document Is dialog box.
3.	Date is populated with the computer's system date.
4.	If the document is created from the Matter-Document listing, the Primary field is pre-populated with that matter.
5.	If the document is created outside of a matter, no other fields can be completed until the Primary Matter field is populated.
6.	The Author field is pre-populated with the user.
7.	The Author Faucet looks to Personnel in the Primary Matter.
8.	The Author Cowboy Hat is a lookup to Entity Listing.
9.	Category is a look-up on the Document Categories for Document Types assigned to the Law Type of the Primary Matter.
10.	Type is a look-up to Document Types assigned to the Law Type of the Primary Matter in the selected Document Category.
11.	Index defaults to the Document Type's index.
12.	Application defaults to the Document Type's index.

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Description	This is the description of the document.	Text	Y	Y	Document.Profile.Description
Incoming	This indicates if the document is incoming.	Radio button with Outgoing (See Rules and Clarifications)	Y	Y	Document.Profile.Incoming
Outgoing	This indicates if the document is outgoing.	Radio button with Incomng (See Rules and Clarifications)	Y	Y	Document.Profile.Outgoing
Date	This is the document date.	Date (See Rules and Clarifications)	Y	Y	Document.Profile.Date
Version Control	If enabled, creates a new version of the last document version each time the document is opened.	Checkbox (See Rules and Clarifications)	N	N	Document.Profile.VersionContr ol
Locked	If enabled, locks the document and profile from editing.	Checkbox (See Rules and Clarifications)	N	N	Document.Profile.Locked

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Field Label	Definition	Properties	UI Req'd	db Req'd	Help ID
Profile Only	Indicates there is no file associated with the profile.	Checkbox (See Rules and Clarifications)	N	N	Document.Profile.ProfileOnly
Primary Matter (Number and Matter Search Name)	This is the primary matter for the document. The Law Type and Entity list for the matter is used to populate fields in the profile.	Combination Look-up (See Rules and Clarifications)	Y	Y	Document.Profile.PrimaryMatter
Author (Code and Name)	This is the author of the document.	Combination Look-up (See Rules and Clarifications)	Y	Y	Document.Profile.Author
Category (Code and Description)	This is the category of the document. It is a look-up on the Document Categories for Document Types assigned to the Law Type of the Primary Matter.	Pre-filtered Drop-down List (See Rules and Clarifications)	Y	Y	Document.Profile.Category
Type (Code and Description)	This is the type of document. It is a look-up to Document Types assigned to the Law Type of the Primary Matter.	Pre-filtered Drop-down List (See Rules and Clarifications)	Y	Y	Document.Profile.Type
Index (Code and Description)	This is the index where the document will be located. It defaults to the Document Type's index.	Pre-filtered Drop-down List (See Rules and Clarifications)	Y	Y	Document.Profile.Index
Location	This is the full path where the document file will be stored.	Read Only Text	Y	Y	Document.Profile.Location
File Name	This is the name of the document file.	Read Only Text	Y	Y	Document.Profile.FileName
Application (Code and Description)	This is the application used to generate/open the document. It defaults to the application associated with the Document Type's format.	Pre-filtered Drop-down List (See Rules and Clarifications)	Y	Y	Document.Profile.Application
Comments	These are comments to associate with the document.	Text	N	N	Document.Profile.Comments

Revision No.	Revision Date	Revised By	Revision Description

8.3. Document Profile – Template

General	Description
Help ID	Document.Profile
Title	Document – Profile
Usage	Define a New Document
Type	Data Entry
Open Focus	Description
Tab Order	1. Template Code 2. Template Description 3. Public 4. Description 5. Incoming, if enabled 6. Outgoing, if enabled 7. Version Control 8. Locked 9. Profile Only, if enabled

General	Description
	10. Primary Matter
	11. Primary Matter – Faucet
	12. Primary Matter – Cowboy Hat
	13. Author
	14. Author – Faucet
	15. Author – Cowboy Hat
	16. Category
	17. Type
	18. Index
	19. Application
	20. Comments
	21. Assemble Document
	22. Skip Document Assembly
	23. Choose from Global Assignments
	24. Choose from Author-specific Assignments
	25. Choose from Individual Components
	26. Common
	27. Law Category-specific
	28. Law Type-specific
	29. Template
	30. Boilerplate
	31. Generate Doc
	32. Tree
	33. List
	34. Timeslip
	35. Groupware
	36. Issues
	37. Letterhead
	38. Caption
	39. Certificate
	40. Save Profile
	41. Cancel Profile
Use Cases	9.2.1 Generate Outgoing Documents in FormView

Buttons	Function / Action	Help ID
Primary Matter Faucet	This is a look-up on the user's (MY) matters.	Document.Profile.PrimaryMatterFaucet
Author Faucet	This is a look-up on the Personnel in the matter.	Document.Profile.AuthorFaucet
Generate Doc	When clicked, generates and/or opens the document in the selected application.	Document.Profile.GenerateDoc
Tree	Displays a window from which user can populate the fields from Category through Boilerplate by selecting a value from a tree.	Document.Profile.Tree
List	Displays a window from which user can populate the fields from Category through Boilerplate by selecting a value from a list.	Document.Profile.List
Timeslip	Allows the user to create a timeslip for the document.	Document.Profile.Timeslip
Groupware	Allows the user to generate a Groupware item for the document.	Document.Profile.Groupware
Issues	Allows the user to assign issues to the document.	Document.Profile.Issues

Buttons	Function / Action	Help ID
Letterhead	Enabled if the template or boilerplate includes a letterhead component. Allows the user to select a letterhead for use in assembling the document. If no letterhead is selected manually, the user will be prompted to pick one after clicking Generate Doc.	Document.Profile.Letterhead
Caption	Enabled if the template or boilerplate includes a caption component. Allows the user to select a caption for use in assembling the document. If no caption is selected manually, the user will be prompted to pick one after clicking Generate Doc.	Document.Profile.Caption
Certificate	Enabled if the template or boilerplate includes a certificate component. Allows the user to select a certificate for use in assembling the document. If no certificate is selected manually, the user will be prompted to pick one after clicking Generate Doc.	Document.Profile.Certificate
Save Profile	Saves the profile without closing the window or generating the document.	Document.Profile.SaveProfile
Cancel Profile	Cancels creating the document and/or document profile.	Document.Profile.CancelProfile

Rules and Clarifications
1. Selecting a Law Type makes the template Law Type-specific.
2. The Primary Matter field can be populated with an matter.
3. If the Law Type field is populated, the list of available matters is limited to those of the selected Law Type.
4. The Author field is pre-populated with the user.
5. If the Primary Matter field is populated, the Author Faucet looks to Personnel in that matter.
6. If the Primary Matter field is not populated, the Author Faucet looks at all Personnel in the Address Book.
7. The Author Cowboy Hat is a lookup to Entity Listing.
8. If the Law Type field is populated, the Category field is a look-up on the Document Categories for Document Types assigned to the Law Type.
9. If the Primary Matter field is populated, the Category field is a look-up on the Document Categories for Document Types assigned to the Law Type of that matter.
10. If the Primary Matter and Law Type fields are not populated, the Category field is a look-up on all Document Categories.

Rules and Clarifications
11. If the Law Type field is populated, the Type field is a look-up on Document Types assigned to the Law Type.
12. If the Primary Matter field is populated, the Type field is a look-up on the Document Types assigned to the Law Type of that Matter in the selected Document Category.
13. If the Primary Matter and Law Type fields are not populated, the Category field is a look-up on all Document Types.
14. If the Type field is populated, the Index defaults to the Document Type's index; else, it is a lookup on all indexes.
15. If the Type field is populated, the Application defaults to the Document Type's format application; else, it is a lookup on all applications.
16. If Skip Document Assembly is selected, all remaining fields are disabled.
17. If the Law Type (or Primary Matter), Category and Type fields are not populated, the following fields are disabled: Choose from Global Assignments Choose from Author-specific Assignments Law Type-specific Law Category-specific
18. If the Law Type (or Primary Matter), Category and Type fields are not populated and the Document Type has a default document assembly assigned, the Template and Boilerplate fields are populated accordingly.
19. If Choose from Global Assignments is selected, the Template looks up to templates assigned to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.
20. If Choose from Author-specific Assignments is selected, the Template looks up to templates assigned for the author to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.
21. If Choose from Individual Components is selected, the Common, Law Category-specific and Law Type-specific fields are enabled, and are filters to be applied to the Template and Boilerplate lookups (the default is for all to be selected). Template and Boilerplate are now independent lookups.

Field Label	Definition	Properties	UI Reqcd	db Reqcd	Help ID
Template Code	This is the code for the template.	Code	Y	Y	Document.Template.Code
Description (Template)	This is the description for the template.	Description	Y	Y	Document.Template.Description
Public	If checked, the template is available ot all users. If not checked, the template is only available to the user who created it.	Checkbox	N	N	Document.Template.Public
Description (Document)	This is the description of the document.	Description	N	N	Document.Template.Document Description
Incoming	This indicates if the document is incoming.	Radio button with Outgoing (See Rules and Clarifications)	N	N	Document.Template.Incoming
Outgoing	This indicates if the document is outgoing.	Radio button with Incomng (See Rules and Clarifications)	N	N	Document.Template.Outgoing
Date		Date (See Rules and Clarifications)	N	N	
Version Control	If enabled, creates a new version of the last document version each time the document is opened.	Checkbox (See Rules and Clarifications)	N	N	Document.Template.VersionControl

RealLegal, Inc. Confidential and Proprietary Information
Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Field Label	Definition	Properties	UI Req'd	db Req'd	Help ID
Locked	If enabled, locks the document and profile from editing.	Checkbox (See Rules and Clarifications)	N	N	Document.Template.Locked
Profile Only	Indicates there is no file associated with the profile.	Checkbox (See Rules and Clarifications)	N	N	Document.Template.ProfileOnly
Primary Matter (Number and Matter Search Name)	This is the primary matter for the document. The Law Type and Entity list for the matter is used to populate fields in the profile.	Combination Look-up (See Rules and Clarifications)	N	N	Document.Template.PrimaryMatter
Author (Code and Name)	This is the author of the document.	Combination Look-up (See Rules and Clarifications)	N	N	Document.Template.Author
Category (Code and Description)	This is the category of the document. It is a look-up on the Document Categories for Document Types assigned to the Law Type of the Primary Matter.	Pre-filtered Drop-down List (See Rules and Clarifications)	N	N	Document.Template.Category
Type (Code and Description)	This is the type of document. It is a look-up to Document Types assigned to the Law Type of the Primary Matter in the selected Document Category.	Pre-filtered Drop-down List (See Rules and Clarifications)	N	N	Document.Template.Type
Index (Code and Description)	This is the index where the document will be located. It defaults to the Document Type's index.	Pre-filtered Drop-down List (See Rules and Clarifications)	N	N	Document.Template.Index
Location	This is the full path where the document file will be stored. This field is only populated if sufficient fields are selected for creating a complete path.	Read Only Text	N	N	Document.Template.Location
Application (Code and Description)	This is the application used to generate/open the document. It defaults to the application associated with the Document Type's format.	Pre-filtered Drop-down List (See Rules and Clarifications)	N	NN	Document.Template.Application
Comments	These are comments to associate with the document.	Text	N	N	Document.Template.Comments
Assemble Document	If selected, the document will be assembled using selected components.	Radio button with Skip Document Assembly (See Rules and Clarifications)	N	NA	Document.Template.AssembleDocument
Skip Document Assembly	If selected, the document will open as a blank file.	Radio button with Assemble Document (See Rules and Clarifications)	N	NA	Document.Template.SkipDocumentAssembly
Choose from Global Assignments	If selected, the Template looks up to templates assigned to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.	Radio button with Choose from Author-specific Assignments and Choose from Individual Components (See Rules and Clarifications)	N	NA	Document.Template.ChoosefromGlobalAssignments
Choose from Author-specific Assignments	If selected, the Template looks up to templates assigned for the author to the Document Type, and the Boilerplates are limited to those assigned with the selected Template.	Radio button with Choose from Global Assignments and Choose from Individual Components (See Rules and Clarifications)	N	NA	Document.Template.ChoosefromAuthorpecificAssignments

RealLegal, Inc. Confidential and Proprietary Information
 Andes Tupungato • Document Assembly Multi-Component Assignment FDS

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Choose from Individual Components	If selected, the Common, Law Category-specific and Law Type-specific fields are enabled, and are filters to be applied to the Template and Boilerplate lookups (the default is for all to be selected). Template and Boilerplate are now independent lookups.	Radio button with Choose from Global Assignments and Choose from Author-specific Assignments (See Rules and Clarifications)	N	NA	
Common	If selected, Common components are included in the template and boilerplate lookups.	Checkbox (See Rules and Clarifications)	N	NA	Document.Template.Common
Law Category-specific	If selected, Law Category-specific components are included in the template and boilerplate lookups.	Checkbox (See Rules and Clarifications)	N	NA	Document.Template.LawCategoryspecific
Law Type-specific	If selected, Law Type-specific components are included in the template and boilerplate lookups.	Checkbox (See Rules and Clarifications)	N	NA	Document.Template.LawTypespecific
Template	This is a list of templates that are available for use in assembling the document. The values on the list are determined by the values in the following fields: 22. Choose from Global Assignments 23. Choose from Author-specific Assignments 24. Choose from Individual Components 25. Common 26. Law Category-specific 27. Law Type-specific	Pre-filtered Drop-down List (See Rules and Clarifications)	N	N	Document.Template.Template
Boilerplate	This is a list of templates that are available for use in assembling the document. If Choose from Global Assignments or Choose from Author-specific Assignments is selected, the list of available boilerplates is limited to those assigned to the document type along with the selected template. If Choose from Individual Components is selected, the list of boilerplates is independent of the value in the template field, and is controlled by the values in the following fields. 28. Common 29. Law Category-specific 30. Law Type-specific	Pre-filtered Drop-down List (See Rules and Clarifications)	N	N	Document.Template.Boilerplate

Revision No.	Revision Date	Revised By	Revision Description

8.4. Document Profile – Choose Components – TreeView



General	Description
Help ID	Document.ChooseComponents.TreeView
Title	Choose Document Profile Components
Usage	Used to select a Document Type or Component Combination for Populating the Document Profile

General	Description
Type	Tree Window
Open Focus	Select
Tab Order	1. Select 2. Cancel 3. Global 4. Author-specific
Use Cases	9.2.1 Generate Outgoing Documents in FormView 9.2.2 Generate Outgoing Documents in TreeView

Buttons	Function / Action	Help ID
Select	Enabled after a Document Type or Component Combination is selected.	Document.ChooseComponents.TreeView.Select
Cancel	Closes the window without selecting a value.	Document.ChooseComponents.TreeView.Cancel

Rules and Clarifications
1. The list is filtered by assignments to the law type of the Primary Matter.
2. The tree includes document types with and without component combination assignments.
3. If Profile Only is selected on the Document Profile, component combination assignments are not included, and the Global and Author-specific fields are disabled.
4. If Skip Document Assembly is selected on the Document Profile, component combination assignments are not included, and the Global and Author-specific fields are disabled.
5. If Global is selected, the tree only includes global assignments.
6. If Author-specific is selected, the tree only includes assignments for the selected author.
7. Default component combinations are highlighted and have a checkbox to the left of them.
8. If a Document Category is selected on the Document Profile, it is highlighted on the tree and its branch is expanded.
9. If a Document Type is selected on the Document Profile, it is highlighted on the tree and its branch is expanded if it contains component combination assignments..
10. If a Document Type does not have a component combination assignment, it does not have a plus (+) sign next to it.
11. If a Document Type is selected, the Document Category, Document Type, Index, Location, File Name, and Application fields are populated.
12. If the Document Type also has a default component combination assignment, the Template and Boilerplate fields are also populated accordingly.
13. If a component combination is selected, the Document Category, Document Type, Index, Location, File Name, Application, Template and Boilerplate fields are populated.
14. You cannot select Individual Components from the tree.

Field Label	Definition	Properties	UI Req'd	db Req'd	Help ID
Global Assignments	If selected, the tree only includes global assignments.	Radion Button with Author-specific Assignments	E/O	NA	Document.ChooseComponents .TreeView GlobalAssignments
Author-specific Assignments	If selected, the tree only includes assignments for the selected author.	Radion Button with Global Assignments	E/O	NA	Document.ChooseComponents .TreeView AuthorspecificAssignments

Revision No.	Revision Date	Revised By	Revision Description

8.5. Document Profile – Choose Components – ListView



General	Description
Help ID	Document.ChooseComponents.ListView
Title	Choose Document Profile Components
Usage	Used to select a Document Type or Component Combination for Populating the Document Profile
Type	Select Window

General	Description
Open Focus	Select
Tab Order	1. Select 2. Cancel 3. Global 4. Author-specific 5. Apply 6. Remove
User Cases	9.2.1 Generate Outgoing Documents in FormView 9.2.3 Generate Outgoing Documents in ListView

Buttons	Function / Action	Help ID
Select	Enabled after a Document Type or Component Combination is selected.	Document.ChooseComponents.ListView.Select
Cancel	Closes the window without selecting a value.	Document.ChooseComponents.ListView.Cancel

Rules and Clarifications
1. The list is filtered by assignments to the law type of the Primary Matter.
2. The list includes document types with and without component combination assignments.
3. The list can be sorted by any column.
4. The list can be filtered by any column.
5. The list can be searched by values in any column.
6. The columns can be resized, but not reordered.
7. If Profile Only is selected on the Document Profile, component combination assignments are not included, and the Global and Author-specific fields are disabled.
8. If Skip Document Assembly is selected on the Document Profile, component combination assignments are not included, and the Global and Author-specific fields are disabled.
9. If Global is selected, the list only includes global assignments.
10. If Author-specific is selected, the list only includes assignments for the selected author.
11. Default component combinations are highlighted and have a checkbox in the Def column.
12. If Apply is selected for Profile Filtering and a Document Category is selected on the Document Profile, the list only includes assignments of that category.
13. If Apply is selected for Profile Filtering and a Document Type is selected on the Document Profile, the list only includes assignments of that type.
14. If Remove is selected for Profile Filtering, values on the Document Profile are ignored.
15. If a line item is selected, the Document Category, Document Type, Index, Location, File Name, Application, Template and Boilerplate fields are populated accordingly.

Rules and Clarifications
16. You cannot select Individual Components from the list.

Field Label	Definition	Properties	UI Reqd	db Reqd	Help ID
Global Assignments	If selected, the list only includes global assignments.	Radion Button with Author-specific Assignments	E/O	NA	Document.ChooseComponents.ListView.GlobalAssignments
Author-specific Assignments	If selected, the list only includes assignments for the selected author.	Radion Button with Global Assignments	E/O	NA	Document.ChooseComponents.ListView.AhorspecificAssignments
Apply	If selected, applies any values from the document profile as filters on the list.	Radion Button with Remove	E/O	NA	Document.ChooseComponents.ListView.Apply
Remove	If selected, ignores any values from the document profile as filters on the list.	Radion Button with Apply	E/O	NA	Document.ChooseComponents.ListView.Remove

Column Heading	Definition	Help ID
Default	Indicates the component combination is the default for the document type.	Document.ChooseComponents.ListView.Default
Document Category	This is the Document Category of the assignment.	Document.ChooseComponents.ListView.Document Category
Document Type	This is the Document Type the assignment.	Document.ChooseComponents.ListView.Document Type
Template	This is the Template of the assignment.	Document.ChooseComponents.ListView.Template
Boilerplate	This is the Boilerplate of the assignment.	Document.ChooseComponents.ListView.Boilerplate

Revision No.	Revision Date	Revised By	Revision Description

9. Use Cases

9.1. Manage Document Assembly Components

9.1.1. Assign Components in ListView

Goal in Context	Assign Document Assembly Components to LawCat/Law Type – DocCat/DocType combinations so that, when a document is generated, it will use the selected components.
Scope & Level	Take existing Document Assembly Components, namely templates and boilerplates, and then assign them to existing LawCat/Law Type – DocCat/DocType combinations.
Preconditions	<p>Law Categories have been created.</p> <p>Law Types have been created, with Law Category as a property of each Law Type.</p> <p>Document Categories have been created.</p> <p>Document Types have been created, with Index and Application as properties of each Document Type.</p> <p>Document Types have been assigned to Document Categories.</p> <p>Templates have been created. These templates can be common, Law Category-specific or Law Type-specific, the latter condition allowing for the inclusion of Law Type-specific values when merging.</p> <p>Boilerplates have been created. These boilerplates can be common, Law Category-specific or Law Type-specific, the latter condition allowing for the inclusion of Law Type-specific values when merging.</p> <p>The Assignment page is displayed on the screen in ListView.</p>
Success End Condition	A Template/Boilerplate component combination is assigned to (appended) a LawCat/Law Type – DocCat/DocType combination and can be used to generate a document.
Failed End Condition	The assignment is not made.
Primary Actors	Data Administrator
Secondary Actors	Any user with the appropriate permissions to Document Assembly Settings.
Trigger	The user assigns components.

STEPS, EXTENSIONS AND SUBVARIATIONS

1. Set scope of assignment
 - a. All Law Categories, or a selected Law Category.
 - b. All Law Types, or a selected Law Type.
 - c. All Document Categories, or a selected Document Category.
 - d. All Document Types, or a selected Document Type.
 - e. All Authors, or a selected Author.
2. The component and component assignment lists are filtered by the scope.
3. Are you assigning components for Practice Manager Document Assembly?

- a. If yes, what components are you assigning from?
 - i. If you want to include Common components, choose Common.
 - ii. If you want to include Law Category-specific components, choose Law Category-specific.
 - (1) If All Law Categories is selected, then all Law Category-specific components appear.
 - (2) If one Law Category is selected, then only components for that Law Category appear.
 - iii. If you want to include Law Type-specific components, choose Law Type-specific.
 - (1) If All Law Types is selected, then all Law Type-specific components appear.
 - (2) If one Law Type is selected, then only components for that Law Type appear.
- b. If No, select the document assembly engine you are making assignments for.
- 4. Choose one or more templates from the Template list.
- 5. Choose one or more boilerplates from the Boilerplate list.
- 6. Choose assign:
 - a. If one template is selected, and one boilerplate is selected, then assign the template-boilerplate combination to each of the selected document types.
 - b. If one template is selected, and more than one boilerplate is selected, then assign a template-boilerplate combination for each boilerplate to each of the selected document types.
 - c. If more than one template is selected, and one boilerplate is selected, then assign the template-boilerplate combination for each template to each of the selected document types.
 - d. If more than one template is selected, and more than one boilerplate is selected, then assign a template-boilerplate combination for each template and boilerplate to each of the selected document types.
 - e. Overwrite existing assignments if they are duplicates of ones being made.

RELATED INFORMATION

Priority	High – Document Assembly is a key function within Practice Manager, and is widely used by existing Practice Manager clients, not to mention that it a very big selling point of the product. Modifying the current assignment methodology will make Document Assembly easier to implement, and therefore get more users interested in using its functionality.
Performance	A single assignment should take no less than 2 to 3 seconds. A basic multiple assignment should take no more than 15 to 20 seconds, depending on the number of records selected. Warning thresholds may need to be established to warn the user that their particular assignment combination may take a long time.
Frequency	Often at implementation. Less often once the system is implemented.

Open Issues	None based on this model.
Due Date	04/27/2001
Other Management Information.	None.
Superordinates	None within the scope of this document.
Subordinates	None.
Related Storyboards	4.1 Document Assembly Settings – Assign Components 4.3 Document Assembly Settings – Assign Components – Hi-level Logic

9.1.2. Assign Components in TreeView

Goal in Context	Assign Document Assembly Components to LawCat/Law Type – DocCat/DocType combinations so that, when a document is generated, it will use the selected components.
Scope & Level	Take existing Document Assembly Components, namely templates and boilerplates, and then assign them to existing LawCat/Law Type – DocCat/DocType combinations.
Preconditions	<p>Law Categories have been created.</p> <p>Law Types have been created, with Law Category as a property of each Law Type.</p> <p>Document Categories have been created.</p> <p>Document Types have been created, with Index and Application as properties of each Document Type.</p> <p>Document Types have been assigned to Document Categories.</p> <p>Templates have been created. These templates can be common, Law Category-specific or Law Type-specific, the latter condition allowing for the inclusion of Law Type-specific values when merging.</p> <p>Boilerplates have been created. These boilerplates can be common, Law Category-specific or Law Type-specific, the latter condition allowing for the inclusion of Law Type-specific values when merging.</p> <p>The Assignment page is displayed on the screen in TreeView.</p>
Success End Condition	A Template/Boilerplate component combination is assigned to (appended) a LawCat/Law Type – DocCat/DocType combination and can be used to generate a document.
Failed End Condition	The assignment is not made.
Primary Actors	Data Administrator
Secondary Actors	Any user with the appropriate permissions to Document Assembly Settings.
Trigger	The user assigns components.

STEPS, EXTENSIONS AND SUBVARIATIONS

1. Set scope of assignment
 - a. All Law Categories, or a selected Law Category.
 - b. All Law Types, or a selected Law Type.
 - c. All Document Categories, or a selected Document Category.
 - d. All Document Types, or a selected Document Type.
 - e. All Authors, or a selected Author.
2. The component and component assignment lists are filtered by the scope.
3. Are you assigning components for Practice Manager Document Assembly?
 - a. If yes, what components are you assigning from?
 - i. If you want to include Common components, choose Common.

- ii. If you want to include Law Category-specific components, choose Law Category-specific.
 - (1) If All Law Categories is selected, then all Law Category-specific components appear.
 - (2) If one Law Category is selected, then only components for that Law Category appear.
- iii. If you want to include Law Type-specific components, choose Law Type-specific.
 - (1) If All Law Types is selected, then all Law Type-specific components appear.
 - (2) If one Law Type is selected, then only components for that Law Type appear.
- b. If No, select the document assembly engine you are making assignments for.
- 4. Choose one or more templates from the Template list.
- 5. Choose one or more boilerplates from the Boilerplate list.
- 6. Choose assign:
 - a. If one template is selected, and one boilerplate is selected, then assign the template-boilerplate combination to each of the selected document types.
 - b. If one template is selected, and more than one boilerplate is selected, then assign a template-boilerplate combination for each boilerplate to each of the selected document types.
 - c. If more than one template is selected, and one boilerplate is selected, then assign the template-boilerplate combination for each template to each of the selected document types.
 - d. If more than one template is selected, and more than one boilerplate is selected, then assign a template-boilerplate combination for each template and boilerplate to each of the selected document types.
 - e. Overwrite existing assignments if they are duplicates of ones being made.
- 7. To make an assignment the default, right click on the combination and choose Set as Default from the short-cut menu.

RELATED INFORMATION

Priority	High – Document Assembly is a key function within Practice Manager, and is widely used by existing Practice Manager clients, not to mention that it a very big selling point of the product. Modifying the current assignment methodology will make Document Assembly easier to implement, and therefore get more users interested in using its functionality.
Performance	A single assignment should take no less than 2 to 3 seconds. A basic multiple assignment should take no more than 15 to 20 seconds, depending on the number of records selected. Warning thresholds may need to be established to warn the user that their particular assignment combination may take a long time.
Frequency	Often at implementation. Less often once the system is implemented.

Open Issues	None based on this model.
Due Date	04/27/2001
Other Management Information.	None.
Superordinates	None within the scope of this document.
Subordinates	None.
Related Storyboards	4.1 Document Assembly Settings – Assign Components 4.3 Document Assembly Settings – Assign Components – Hi-level Logic

9.1.3. Assign Components in FormView

Goal in Context	Assign Document Assembly Components to LawCat/Law Type – DocCat/DocType combinations so that, when a document is generated, it will use the selected components.
Scope & Level	Take existing Document Assembly Components, namely templates and boilerplates, and then assign them to existing LawCat/Law Type – DocCat/DocType combinations.
Preconditions	<p>Law Categories have been created.</p> <p>Law Types have been created, with Law Category as a property of each Law Type.</p> <p>Document Categories have been created.</p> <p>Document Types have been created, with Index and Application as properties of each Document Type.</p> <p>Document Types have been assigned to Document Categories.</p> <p>Templates have been created. These templates can be common, Law Category-specific or Law Type-specific, the latter condition allowing for the inclusion of Law Type-specific values when merging.</p> <p>Boilerplates have been created. These boilerplates can be common, Law Category-specific or Law Type-specific, the latter condition allowing for the inclusion of Law Type-specific values when merging.</p> <p>The Assignment page is displayed on the screen in ListView or TreeView.</p>
Success End Condition	A Template/Boilerplate component combination is assigned to (appended) a LawCat/Law Type – DocCat/DocType combination and can be used to generate a document.
Failed End Condition	The assignment is not made.
Primary Actors	Data Administrator
Secondary Actors	Any user with the appropriate permissions to Document Assembly Settings.
Trigger	The user assigns components.

STEPS, EXTENSIONS AND SUBVARIATIONS

1. Click New or Open. The Document Assembly Assignment Properties window appears.
2. Choose a Law Category.
3. Choose a Law Type.
4. Choose a Document Category.
5. Choose a Document Type.
6. Is the assignment to be author-specific?
 - a. If yes, choose an author.
 - b. If no, leave blank.
7. Filter the components list as needed.

- a. Are you assigning components for Practice Manager Document Assembly?
 - i. If yes, what components are you assigning from?
 - (1) If you want to include Common components, choose Common.
 - (2) If you want to include Law Category-specific components, choose Law Category-specific. The components for the selected Law Category are included.
 - (3) If you want to include Law Type-specific components, choose Law Type-specific. The components for the selected Law Type are included.
 - ii. If No, select the document assembly engine you are making assignments for.
- 8. Choose a template in the Template field.
- 9. Choose a boilerplate in the Boilerplate field.
- 10. Choose assign:
 - a. Assign the template-boilerplate combination to the selected document type.
 - b. Overwrite existing assignments if they are duplicates of ones being made.
- 11. To make an assignment the default, right click on the combination and choose Set as Default from the short-cut menu.

RELATED INFORMATION

Priority	High – Document Assembly is a key function within Practice Manager, and is widely used by existing Practice Manager clients, not to mention that it a very big selling point of the product. Modifying the current assignment methodology will make Document Assembly easier to implement, and therefore get more users interested in using its functionality.
Performance	A single assignment should take no less than 2 to 3 seconds. A basic multiple assignment should take no more than 15 to 20 seconds, depending on the number of records selected. Warning thresholds may need to be established to warn the user that their particular assignment combination may take a long time.
Frequency	Often at implementation. Less often once the system is implemented.
Open Issues	None based on this model.
Due Date	04/27/2001
Other Management Information.	None.
Superordinates	4.1 Document Assembly Settings – Assign Components
Subordinates	None.
Related Storyboards	4.3 Document Assembly Settings – Assign Components – Hi-level Logic 4.2 Document Assembly Settings – Assign Components – Properties

9.1.4. Unassign Components

Goal in Context	Unassign existing component assignments from LawCat/Law Type – DocCat/DocType combinations.
Scope & Level	Unassign existing component assignments from LawCat/Law Type – DocCat/DocType combinations.
Preconditions	The Assignment page is displayed on the screen in ListView or TreeView.
Success End Condition	The assignment is removed from the LawCat/Law Type – DocCat/DocType combination.
Failed End Condition	The assignment is not removed and can still be used.
Primary Actors	Data Administrator
Secondary Actors	Any user with the appropriate permissions to Document Assembly Settings.
Trigger	The user unassigns components.

STEPS, EXTENSIONS AND SUBVARIATIONS

1. Highlight one or more existing assignments.
2. Click Unassign. The Confirm Unassignment dialog appears:

You have chosen to unassign existing component combinations.

Once they have been unassigned, you will not be able to use these combinations for generating documents unless you reassign them.

Click Yes to unassign the selected component combinations.
 Click No to keep the assignments.

[Yes] [No]

- a. Click Yes to unassign the selected component combinations.
- b. Click No to keep the assignments.

RELATED INFORMATION

Priority	High – Document Assembly is a key function within Practice Manager, and is widely used by existing Practice Manager clients, not to mention that it a very big selling point of the product. Modifying the current assignment methodology will make Document Assembly easier to implement, and therefore get more users interested in using its functionality.
Performance	A single assignment should take no less than 2 to 3 seconds. A basic multiple assignment should take no more than 15 to 20 seconds, depending on the number of records selected. Warning thresholds may need to be established to warn the user that

	their particular assignment combination may take a long time.
Frequency	Often at implementation. Less often once the system is implemented.
Open Issues	None based on this model.
Due Date	04/27/2001
Other Management Information.	None.
Superordinates	4.1 Document Assembly Settings – Assign Components 4.3 Document Assembly Settings – Assign Components – Hi-level Logic 4.2 Document Assembly Settings – Assign Components – Properties
Subordinates	None.
Related Storyboards	4.1 Document Assembly Settings – Assign Components 4.3 Document Assembly Settings – Assign Components – Hi-level Logic 4.2 Document Assembly Settings – Assign Components – Properties

9.2. Generate Outgoing Document

9.2.1. Generate Outgoing Documents in FormView

Goal in Context	To Generate a Document in FormView using assigned document assembly components.
Scope & Level	Select criteria necessary to profile a document and identify what components should be used in assembling the outgoing document.
Preconditions	Document Assembly Components have been assigned to LawCat/Law Type – DocCat/DocType combinations.
Success End Condition	A document is generated using the components, or a blank document is opened if Skip Document Assembly was selected or the LawCat/Law Type – DocCat/DocType combination did not have any component combination assignment.
Failed End Condition	A document is not generated using the assigned components, or a document is generated using the wrong components, or a blank document is opened even though assignment exist.
Primary Actors	Any user with the appropriate permissions to create a document.
Secondary Actors	None.
Trigger	The user creates a document.

STEPS, EXTENSIONS AND SUBVARIATIONS

1. Click New.
2. Choose Outgoing, and deselect Profile Only if selected.
3. Enter a Document Description.
4. Modify the date as needed.
5. Choose Document Management options:
 - a. If the document is to have version control, select this option.
 - b. If the document is to be locked after creation, select this option.
6. Choose a Primary Matter.
 - a. If opened from a Matter-Document listing, the value in this field defaults to that of the active matter.
 - b. The faucet look-up is on the user's (MY) matters.
 - c. The cowboy-hat look-up is on the global matter listing.
7. Choose an Author
 - a. If the user is assigned to the matter, the value in this field defaults to that user.
 - b. The faucet look-up is on personnel assigned to the matter.
 - c. The cowboy-hat look-up is on the global entity listing.
8. Choose a Document Category.
 - a. The list is filtered on the Law Type of the selected Primary Matter.
9. Choose a Document Type.

- a. The list is filtered on the Document Category within the Law Type of the selected Primary Matter.
10. Choose an Index.
 - a. The value in this field is populated with the Outgoing Index of the selected Document Type.
 - b. The Location and File Name fields are automatically populated.
 11. Choose an Application.
 - a. The value in this field is populated with the Outgoing Format of the selected Document Type.
 12. Enter Comments, as needed.
 13. Assemble the document?
 - a. If yes, what components are you assigning from?
 - i. If you want to choose from Global Assignments, choose this option. The available Templates and Boilerplates are from the global assignments.
 - ii. If you want to choose from Author-specific Assignments, choose this option. The available Templates and Boilerplates are from the assignments for the selected author.
 - iii. If you want to choose individual components (those that aren't assigned to a specific document type), choose this option. Choose the individual documents to select.
 - (1) If you want to include Common components, choose Common.
 - (2) If you want to include Law Category-specific components, choose Law Category-specific. The components for the selected Law Category are included.
 - (3) If you want to include Law Type-specific components, choose Law Type-specific. The components for the selected Law Type are included.
 - iv. Choose a Template.
 - (1) If Global Assignments is enabled, then the templates are from the global assignments.
 - (2) If Author-specific Assignments is enabled, then the templates are from assignments for the selected author.
 - (3) If Individual is enabled, the templates listed are those of the selected scopes.
 - v. Choose a Boilerplate.
 - (1) If Global Assignments is enabled, then the boilerplates are those assigned in combination with the selected template and are from the global assignments.
 - (2) If Author-specific Assignments is enabled, then the boilerplates are those assigned in combination with the selected template and are from the author-specific assignments.
 - (3) If Individual is enabled, the boilerplates listed are those of the selected scopes and are independent of the selected template.
 - vi. If enabled, choose a Letterhead.
 - vii. If enabled, choose a Caption.
 - viii. If enabled, choose a Certificate.
 - ix. Generate Doc.

- (1) The profile is saved, but remains open in order to keep the timer active.
 - (2) Analyze the component requirements.
 - (3) Prompt for additional components as needed.
 - (4) Choose records to populate fields as needed.
 - (5) Open assembled document in the selected application.
- b. If No, the Document Assembly fields are disabled.
 - i. Generate Doc.
 - (1) The profile is saved, but remains open in order to keep the timer active.
 - (2) Open the blank document defined for the selected application.

RELATED INFORMATION

Priority	High – Document Assembly is a key function within Practice Manager, and is widely used by existing Practice Manager clients, not to mention that it a very big selling point of the product. Modifying the current assignment methodology will make Document Assembly easier to implement, and therefore get more users interested in using its functionality.
Performance	A single assignment should take no less than 2 to 3 seconds. A basic multiple assignment should take no more than 15 to 20 seconds, depending on the number of records selected. Warning thresholds may need to be established to warn the user that their particular assignment combination may take a long time.
Frequency	Often at implementation. Less often once the system is implemented.
Open Issues	None based on this model.
Due Date	04/27/2001
Other Management Information.	None.
Superordinates	None within the scope of this FDS.
Subordinates	None.
Related Storyboards	5.1 Generate Document – From FormView

9.2.2. Generate Outgoing Documents in TreeView

Goal in Context	To Generate a Document in TreeView using assigned document assembly components.
Scope & Level	Select criteria necessary to profile a document and identify what components should be used in assembling the outgoing document.
Preconditions	Document Assembly Components have been assigned to LawCat/Law Type – DocCat/DocType combinations.
Success End Condition	A document is generated using the components, or a blank document is opened if Skip Document Assembly was selected or the LawCat/Law Type – DocCat/DocType combination did not have any component combination assignment.
Failed End Condition	A document is not generated using the assigned components, or a document is generated using the wrong components, or a blank document is opened even though assignment exist.
Primary Actors	Any user with the appropriate permissions to create a document.
Secondary Actors	None.
Trigger	The user creates a document.

STEPS, EXTENSIONS AND SUBVARIATIONS

1. Click New Document.
2. Choose Outgoing, and deselect Profile Only if selected.
3. Enter a Document Description.
4. Modify the date as needed.
5. Choose Document Management options:
 - a. If the document is to have version control, select this option.
 - b. If the document is to be locked after creation, select this option.
6. Choose a Primary Matter.
 - a. If opened from a Matter-Document listing, the value in this field defaults to that of the active matter.
 - b. The faucet look-up is on the user’s (MY) matters.
 - c. The cowboy-hat look-up is on the global matter listing.
7. Choose an Author
 - a. If the user is assigned to the matter, the value in this field defaults to that user.
 - b. The faucet look-up is on personnel assigned to the matter.
 - c. The cowboy-hat look-up is on the global entity listing.
8. Click Tree. The Choose Document Profile Component tree window appears
9. What components are you assigning from?
 - a. If you want to choose from Global Assignments, choose this option. The available Templates and Boilerplates are from the global assignments.

- b. If you want to choose from Author-specific Assignments, choose this option. The available Templates and Boilerplates are from the assignments for the selected author.
10. Choose a Component and Click Select. The Document Profile appears.
 - a. If the user chooses a Document Type, the following fields are also populated:
 - i. Document Category
 - ii. Document Type
 - iii. Index
 - iv. Application
 - v. Assemble Document (selected)
 - vi. Choose from Global Assignments or Choose from Author-specific Assignments is selected, depending on TreeView option.
 - vii. If the Document Type has a default component combination assigned, the following fields are populated:
 - (1) Template
 - (2) Boilerplate
 - viii. If the Document Type does not have a default component assignment, these fields are blank.
 - b. If user chooses a component combinations, the following fields are populated:
 - i. Document Category
 - ii. Document Type
 - iii. Index
 - iv. Application
 - v. Assemble Document (selected)
 - vi. Choose from Global Assignments or Choose from Author-specific Assignments is selected, depending on TreeView option.
 - vii. Template
 - viii. Boilerplate
11. Confirm the selection in the fields.
12. Enter Comments, as needed.
13. If enabled, choose a Letterhead.
14. If enabled, choose a Caption.
15. If enabled, choose a Certificate.
16. Generate Doc.
 - a. The profile is saved, but remains open in order to keep the timer active.
 - b. Analyze the component requirements.
 - c. Prompt for additional components as needed.
 - d. Choose records to populate fields as needed.
 - e. Open assembled document in the selected application.

RELATED INFORMATION

Priority	High – Document Assembly is a key function within Practice Manager, and is widely used by existing Practice Manager clients, not to mention that it a very big selling point of the product. Modifying the current assignment methodology will make Document Assembly easier to implement, and therefore get more users interested in using its functionality.
Performance	A single assignment should take no less than 2 to 3 seconds. A basic multiple assignment should take no more than 15 to 20 seconds, depending on the number of records selected. Warning thresholds may need to be established to warn the user that their particular assignment combination may take a long time.
Frequency	Often at implementation. Less often once the system is implemented.
Open Issues	None based on this model.
Due Date	04/27/2001
Other Management Information.	None.
Superordinates	None.
Subordinates	None.
Related Storyboards	5.2 Generate Document – From TreeView

9.2.3. **Generate Outgoing Documents in ListView**

Goal in Context	To Generate a Document in TreeView using assigned document assembly components.
Scope & Level	Select criteria necessary to profile a document and identify what components should be used in assembling the outgoing document.
Preconditions	Document Assembly Components have been assigned to LawCat/Law Type – DocCat/DocType combinations.
Success End Condition	A document is generated using the components, or a blank document is opened if Skip Document Assembly was selected or the LawCat/Law Type – DocCat/DocType combination did not have any component combination assignment.
Failed End Condition	A document is not generated using the assigned components, or a document is generated using the wrong components, or a blank document is opened even though assignment exist.
Primary Actors	Any user with the appropriate permissions to create a document.
Secondary Actors	None.
Trigger	The user creates a document.

STEPS, EXTENSIONS AND SUBVARIATIONS

1. Click New Document.
2. Choose Outgoing, and deselect Profile Only if selected.
3. Enter a Document Description.
4. Modify the date as needed.
5. Choose Document Management options:
 - a. If the document is to have version control, select this option.
 - b. If the document is to be locked after creation, select this option.
6. Choose a Primary Matter.
 - a. If opened from a Matter-Document listing, the value in this field defaults to that of the active matter.
 - b. The faucet look-up is on the user’s (MY) matters.
 - c. The cowboy-hat look-up is on the global matter listing.
7. Choose an Author
 - a. If the user is assigned to the matter, the value in this field defaults to that user.
 - b. The faucet look-up is on personnel assigned to the matter.
 - c. The cowboy-hat look-up is on the global entity listing.
8. Click List. The Choose Document Profile Component list window appears
9. What components are you assigning from?
 - a. If you want to choose from Global Assignments, choose this option. The available Templates and Boilerplates are from the global assignments.

- b. If you want to choose from Author-specific Assignments, choose this option. The available Templates and Boilerplates are from the assignments for the selected author.
10. Apply or Remove Profile Filtering
 - a. If the Document Profile already has a Document Category selected and you choose Apply, the list only shows Document Types assigned to that Category for the Law Type of the selected Primary Matter.
 - b. If the Document Profile already has a Document Type selected and you choose Apply, the list only shows that Document Type as it is assigned to the Law Type of the selected Primary Matter.
 - c. If you choose remove, all Document Types assigned to the Law Type appear, regardless of Document Category.
11. Choose a Component and Click Select. The Document Profile appears.
 - a. If the Component does not include a document assembly component, the following fields are populated:
 - i. Document Category
 - ii. Document Type
 - iii. Index
 - iv. Application
 - b. If the Component does not include a document assembly component but there is a default, the following fields are populated:
 - i. Document Category
 - ii. Document Type
 - iii. Index
 - iv. Application
 - v. Assemble Document (selected)
 - vi. Choose from Global Assignments or Choose from Author-specific Assignments is selected, depending on ListView option.
 - vii. Template (default)
 - viii. Boilerplate (default)
 - c. If the Component includes a document assembly component, the following fields are populated:
 - i. Document Category
 - ii. Document Type
 - iii. Index
 - iv. Application
 - v. Assemble Document (selected)
 - vi. Choose from Global Assignments or Choose from Author-specific Assignments is selected, depending on ListView option.
 - vii. Template
 - viii. Boilerplate
12. Confirm the selection in the fields.
13. Enter Comments, as needed.
14. If enabled, choose a Letterhead.

15. If enabled, choose a Caption.
16. If enabled, choose a Certificate.
17. Generate Doc.
 - a. The profile is saved, but remains open in order to keep the timer active.
 - b. Analyze the component requirements.
 - c. Prompt for additional components as needed.
 - d. Choose records to populate fields as needed.
 - e. Open assembled document in the selected application.

RELATED INFORMATION

Priority	High – Document Assembly is a key function within Practice Manager, and is widely used by existing Practice Manager clients, not to mention that it a very big selling point of the product. Modifying the current assignment methodology will make Document Assembly easier to implement, and therefore get more users interested in using its functionality.
Performance	A single assignment should take no less than 2 to 3 seconds. A basic multiple assignment should take no more than 15 to 20 seconds, depending on the number of records selected. Warning thresholds may need to be established to warn the user that their particular assignment combination may take a long time.
Frequency	Often at implementation. Less often once the system is implemented.
Open Issues	None based on this model.
Due Date	04/27/2001
Other Management Information.	None.
Superordinates	None.
Subordinates	None.
Related Storyboards	5.3 Generate Document – From ListView

10. Assignment Variations

The following table describes assignment variations based on selections at the top of the Document Assembly Settings – Assign page. These same variations apply for global and author-specific assignment; only, in the latter case, the assignment should be appended with the ID of the author.

Variation Number	Law Category	Law Type	Document Category	Document Type	Assignment To
1	All	All	All	All	The assignment is to all document type assignments.
2	All	All	All	Select	The assignment is to all document type assignments of the selected document type.
3	All	All	Select	All	The assignment is to all document type assignments where the category of the document type is the selected document category.
4	All	All	Select	Select	The assignment is to all document type assignments where the category of the selected document type is the selected document category.
5	All	Select	All	All	The assignment is to all document type assignments made to the selected law type.
6	All	Select	All	Select	The assignment is to all document type assignments made to the selected law type where the document type is the one selected.
7	All	Select	Select	All	The assignment is to all document type assignments made to the selected law type where the category of the document type is the selected document category.
8	All	Select	Select	Select	The assignment is to all document type assignments made to the selected law type where the category of the document type and the document type are the ones selected.
9	Select	All	All	All	The assignment is to all document type assignments made to all law types where the law category is the one selected.
10	Select	All	All	Select	The assignment is to all document type assignments for the selected document type made to all law types where the law category is the one selected
11	Select	All	Select	All	The assignment is to all document type assignments for document type with the selected document category made to all law types where the law category is the one selected
12	Select	All	Select	Select	The assignment is to all document type assignments for the selected document category and document type made to all law types where the law category is the one selected
13	Select	Select	All	All	The assignment is to all document type assignments made to the selected law type. This is basically the same as Number 5.

Variation Number	Law Category	Law Type	Document Category	Document Type	Assignment To
14	Select	Select	All	Select	The assignment is to all document type assignments made to the selected law type where the document type is the one selected. This is basically the same as Number 6.
15	Select	Select	Select	All	The assignment is to all document type assignments made to the selected law type where the category of the document type is the selected document category. This is basically the same as Number 7.
16	Select	Select	Select	Select	The assignment is to all document type assignments made to the selected law type where the category of the document type and the document type are the ones selected. This is basically the same as Number 8.