

## Related Entities

# Functional Design Specifications

Created on February 13, 2002  
by Thomas A. Foley

Revision No. **83**

Last Saved on **March 27, 2002**  
By Thomas A. Foley

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Practice Manager™

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| Comments       |   |

## Change History

| Version No. | Date       | Name | Description of Changes  |
|-------------|------------|------|---|
| 1.0         | 02/15/2002 | TAF  | Initial FDS.  |
| 1.1         | 02/18/2002 | TAF  | General changes to accommodate keeping ENTRELT and MATRELT as is. Modified UI.<br>Add storyboards.<br>Completed the use cases.<br>General screen updates, and clarifications. |
| 1.2         | 02/21/2002 | TAF  | Comments and suggestions from Ricky.  |

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# Related Entities • Functional Design Specifications

## 1. Scope of Function Design Specification

### 1.1. 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
- 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

### 1.2. Definition of Project

Andes:Salado is a general clean-up of defects in Practice Manager, based on the PM8.6 SP-2 code set.

### 1.3. Scope of Document

This document specifically addresses the functionality of Related Entities. Numerous issues existed with respect to Related Entities, and the decision was made to do a complete overall of this functionality to make it consistent, fully functional, and more user-friendly.

## 2. Design Assumptions

### 2.1. What are relationships?

1. Related Entities are two entities that have been manually related to each other, and the nature of their relationship definition defined.
2. Relationships can be entity-specific (global) or matter-specific.
3. Only one global relationship can exist between two entities.
4. Each matter can have only one matter-specific relationship between two **assigned entities – both entities must be assigned to the matter in order to establish a relationship**, based on the role of the entities. *The matter-specific Related Entity listing, however, will combine these assignments into a consolidated view so that all relationships for an entity can be viewed (see Section 3).*
5. Two entities can have relationships defined for one or more matters.
6. For the purposes of clarity, the term “Entity 1” is used to define the currently active or selected entity, and “Entity 2” is used to define the entity being related to Entity 1. This terminology does

not, however, suggest that one entity is superior to the other, as in a parent-child relationship. The relationship is completely reciprocal. If focus were reversed, so would the relationships.

## 2.2. What does reciprocal mean?

1. Basically, reciprocal means the relationship goes both ways. When a relationship is established, each entity appears on the other's related entity listing.
2. Continuing the reciprocal nature of the relation, it is necessary in some cases to define the relationship for each entity from the perspective of the other. For example, if Entity 1 is the father and Entity 2 is the daughter, then two relationships need to be established – Entity 2's relationship to Entity 1, and Entity 1's relationship to Entity 2. This way, when viewed, the relationship descriptions are appropriate. When the user is viewing the Related Entities for the father (Entity 1), they will see the daughter (Entity 2) listed with the appropriate relationship description, and vice versa.

## 2.3. Indirect Relationships

Indirect Relationships are those relationships where two entities are related to a common record, but not necessarily to each other. For example, two entities may be related to the same matter, entity, document, note or workflow item, a direct entity relationship has not been established between the two.

There have been several requests to include functionality within Practice Manager that would list or somehow represent these relationships, other than through the common record, itself. This specification does not attempt to address that functionality at this time. This functionality may be addressed in a future release of Practice Manager as demand warrants its inclusion.

## 3. Outstanding Issues

### 3.1. Saga/Litigation Screens

Within the litigation screens, there is a lot of logic associated with the MATRELT table, that would require more work than can be carried out in the Salado project.

The primary issue is that many DE forms actually create entries in both the ASSIGN and MATRELT tables. In some cases, the user is prompted to carryout these actions; while, in others, the action is carried out automatically. In some areas, the **Relationship** field is defined on the DE form; while in others, the definition is hard-coded, and still in others, it is non-existent.

A secondary issue is that these forms also support allowing multiple relationships between two entities in the same matter, delineated only by role. This is due to the fact that MATRELT uses the ASSIGNIDs instead of the ENTITYIDs when testing for uniqueness. The original goal of this FDS was to eliminate this kind of functionality, and consolidate it within a common method and interface. Unfortunately, this size effort is not practical within the scope and timeframe of Salado.

### 3.2. Short-term Solution

For the reasons described in Section 3.1, we must leave the MATRELT functionality in tact until we can revisit the entire Entity Assignment and Entity Relationship models in an upcoming release. Extensive changes to this functionality could result in defects in other parts of the program.

In Salado, we will make every attempt to unify the UI, however, we are not going to be able to view both the Entity-specific and Matter-specific Entity Relationships on the same listing. We will offer

the option of switching between the two from within the same window, just to make things a bit easier for the user.

### 3.3. Long Term Solution

The entire Entity Assignment and Entity Relationship models need to be reviewed in an upcoming release, with a focus on unifying these into a single model with a single logic that can be easily differentiated in the data, allowing the user to work with entity-specific, matter-specific or all entity relationships in a single view.

## 4. Conversion Considerations

### 4.1. Relationship Field

In earlier version of Practice Manager, there was only one Relationship field. If the relationship was first defined for Entity 1, Entity 2's relationship would have been entered as "Daughter." The problem would have been when viewing the Related Entities for Entity 2. That listing would have shown Entity 2 – the father – with the relationship description of "Daughter," which would have been incorrect.

The above defined design assumption resolves this issue; however, there is now a conversion issue. The best solution is to only populate the first definition – What is Entity 2's relationship to Entity – which is how the definition was probably established in the first place. The reciprocal relationships will have to manually entered by the user.

## 5. Security Considerations

### 5.1. Functional Security

***Note:** There is currently a function called “View Entity Contact Listing.” The Entity Contact Listing is now becoming the Entity – Related Entities listing. If the developer wants to rename this one “View Entity Relationships Listing” and then use it where indicated, that would be acceptable.*

**NEW** – This list contains new functional security operations that need to be added as a result of the functionality defined in this FDS for Related Entities (these should also be added to the central Security FDS):

| Security Function Label     | Impact on User Account when this function is assigned  | Impact on User Account when this function is not assigned        | Not In PMPProf? | Not In PMLite? |
|-----------------------------|--|--|-----------------|----------------|
| Add New Entity Relationship | The user can add a new entity relationship.<br>Requires View Related Entities Listing in order to access the Related Entities window from which adds are carried out.<br>Requires View Entity Listing in order to carry out the entity lookup.<br>Requires View Matter Listing in order to create a matter-specific relationship.                          | The user cannot add a new entity relationship.                   |                 |                |
| Open Entity Relationship    | The user can open and modify an existing entity relationship.<br>Requires View Related Entities Listing in order to access the Related Entities window from which opens/edits are carried out.<br>Requires View Entity Listing in order to carry out the entity lookup.<br>Requires View Matter Listing in order to create a matter-specific relationship. | The user cannot open and modify an existing entity relationship. |                 |                |
| Remove Entity Relationships | The user can remove an existing entity relationship.<br>Requires View Related Entities Listing in order to access the Related Entities window from which removes are carried out.  | The user cannot remove an existing entity relationship.          |                 |                |

| Security Function Label           | Impact on User Account when this function is assigned   | Impact on User Account when this function is not assigned | Not In PMPProf? | Not In PMLite? |
|-----------------------------------|---|---|-----------------|----------------|
| View Entity Relationships Listing | The user can view the Related Entities Listing.<br>One of the following securities functions must be available to the user in order to access the Related Entities Listing:<br>1. Create New Entity<br>2. Open Entity Information<br>3. View Global Entities Listing<br>4. View Matter Entities Listing | The user cannot view the Related Entities Listing.        |                 |                |

**EXISTING** – This list contains existing functional security operations that have been previously added and will be utilized as a result of the functionality defined in this FDS for Related Entities (these should also be included to the central Security FDS):

| Security Function Label    | Impact on User Account when this function is assigned  | Impact on User Account when this function is not assigned  | Not In PMPProf? | Not In PMLite? |
|----------------------------|--|--|-----------------|----------------|
| Create New Entity          | The user can create a new entity, thereby accessing the Related Entities tab if they have View Related Entities Listing.   | The user cannot create a new entity, and may not be able to access the Related Entities tab, even if they have View Related Entities Listing.  |                 |                |
| Open Entity Information    | The user can open an existing entity, thereby accessing the Related Entities tab if they have View Related Entities Listing.   | The user cannot open an existing entity, and may not be able to access the Related Entities tab, even if they have View Related Entities Listing.  |                 |                |
| View Global Entity Listing | The user can view a list of entities, thereby accessing the Related Entities window if they have View Related Entities Listing.<br>The can also select an Entity to populate the Entity 2 field. | The user can view a list of entities, and will not be able to access the Related Entities window, even if they have View Related Entities Listing.<br>They will also not be able to populate the Entity 2 field. |                 |                |
| View Global Matter Listing | The user can view a list of matters, thereby allowing them to create a matter-specific entity relationship.  | The user cannot view a list of matters, so they will not be able to create a matter-specific entity relationship.  |                 |                |

| Security Function Label      | Impact on User Account when this function is assigned  | Impact on User Account when this function is not assigned   | Not In PMProf? | Not In PMLite? |
|------------------------------|--|---|----------------|----------------|
| View Matter Entities Listing | The user can view the list of matter-specific entities, thereby accessing the Related Entities window through a matter if they have View Related Entities Listing. | The user cannot view the list of matter-specific entities, and may not be able to create a matter-specific entity relationship. |                |                |

5.2. Site Security

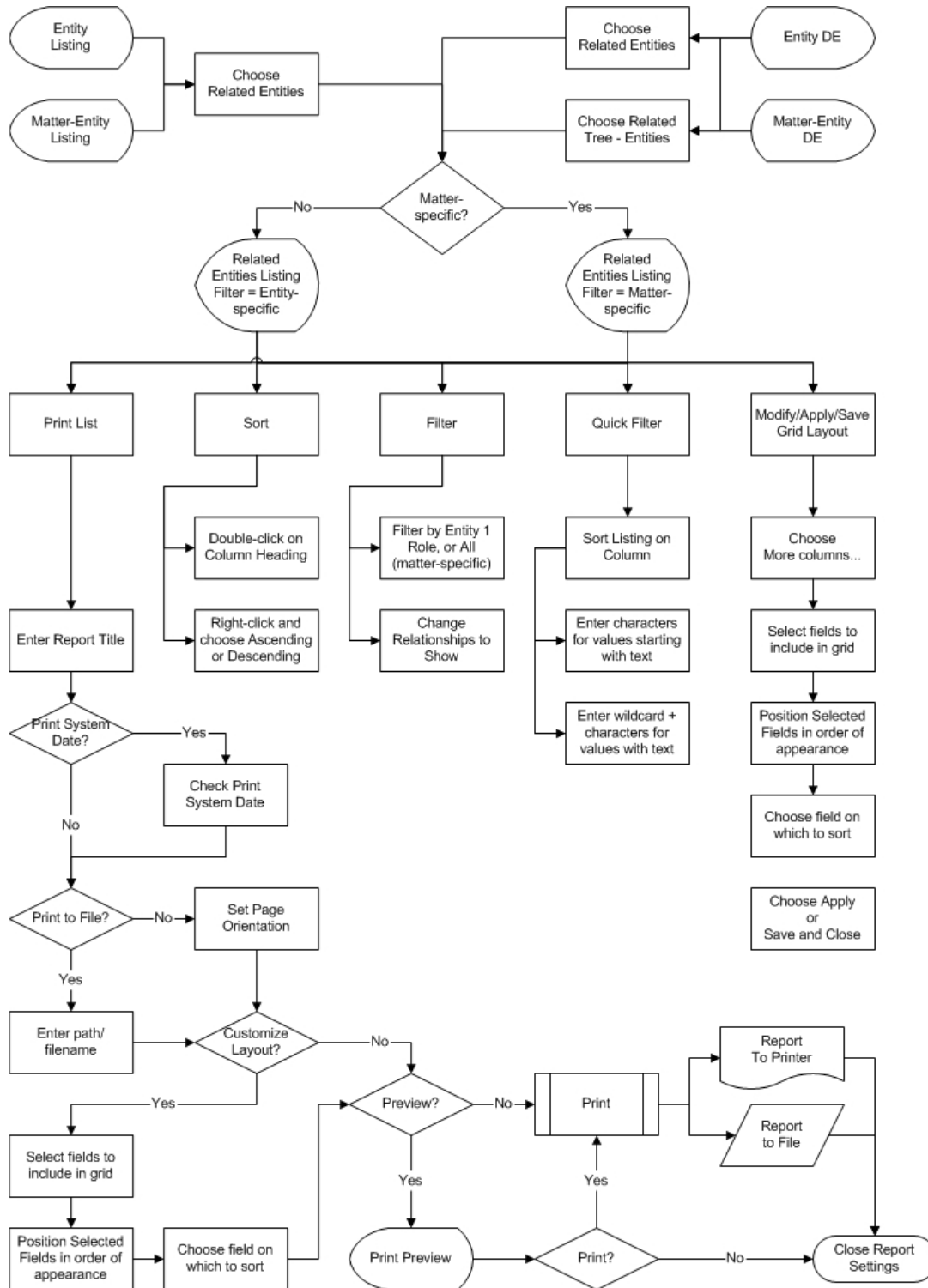
- 5.2.1. The Related Entities listing must respect Site Security, only displaying those entities with relationships with entities the user is allowed to access for matters they are allowed to access.
- 5.2.2. The Entity Lookup on the Relationship Properties window must respect Site Security.
- 5.2.3. The Matter Lookup on the Relationship Properties window must respect Site Security.

5.3. Matter Security

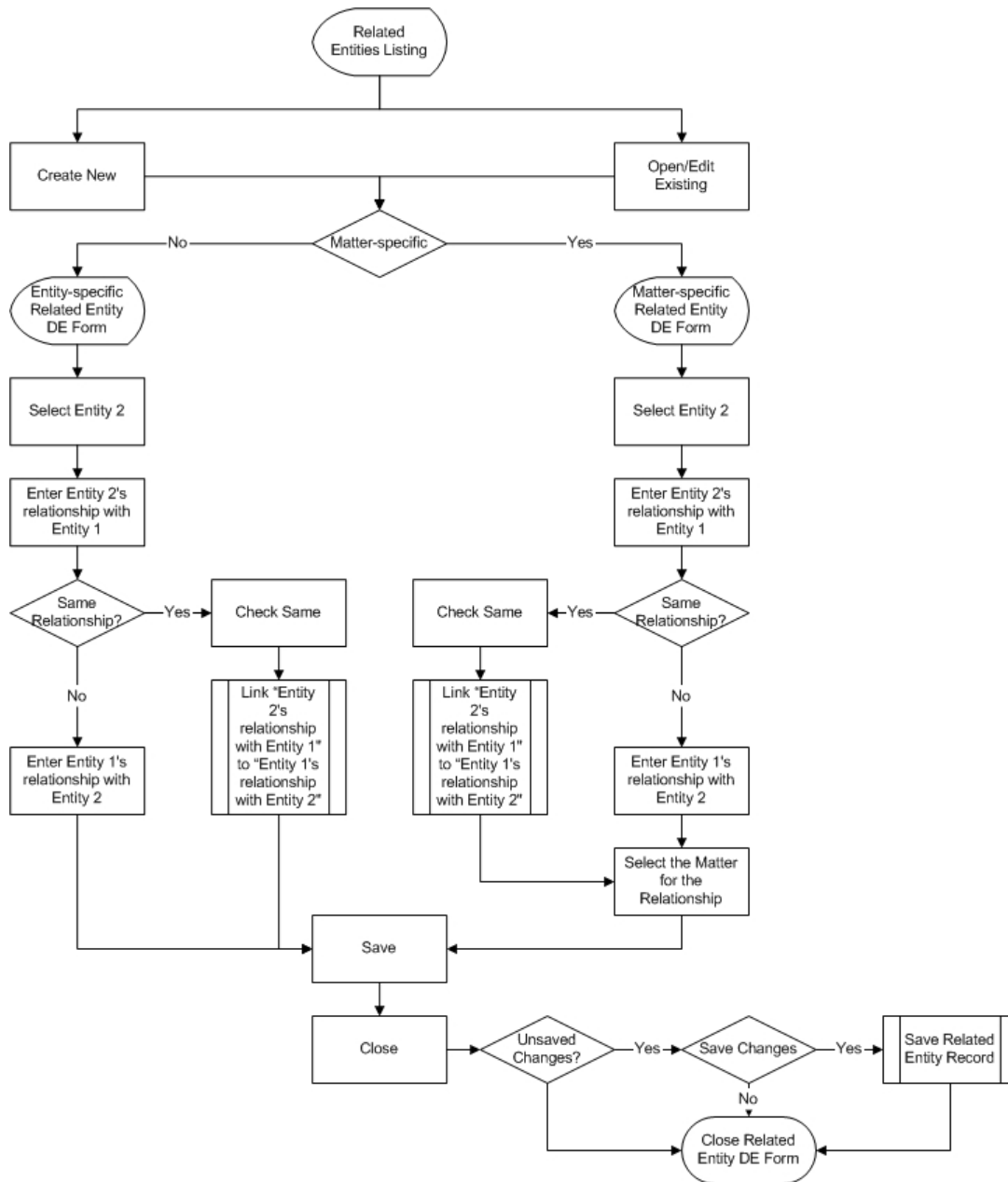
- 5.3.1. The Related Entities listing must respect Matter Security, only displaying those matter-specific entity relationships for matters the user is allowed to access.
- 5.3.2. The Matter Lookup on the Relationship Properties window must respect Site Security.

## 6. Storyboards

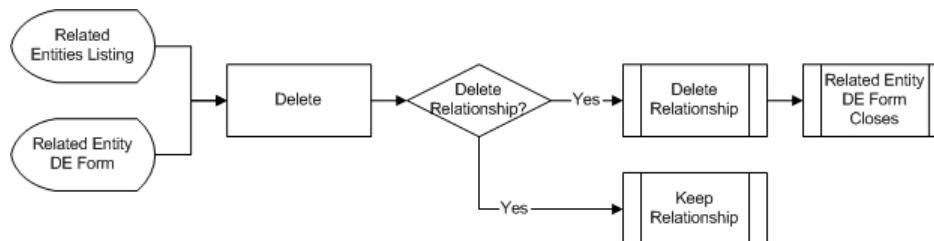
### 6.1. Listing Entity Relationships



### 6.2. Working with Entity Relationships



### 6.3. Removing Entity Relationships





## 7. Mockups

### 7.1. Related Entities Listing – Opened from Global Entity Listing

Related Entities for [entity.name.here]

Entity 1

Name  Entity Type

Phone  Ext  Organization

Phone 2  Ext  Department

Related Entities

Relationships to Show:  Entity-specific Only  Matter-specific Only

| RELATED ENTITIES GRID<br>ENTITY-SPECIFIC ONLY  | RELATED ENTITIES GRID<br>MATTER-SPECIFIC ONLY  |
|--|--|
| <p><u>Default Visible Columns:</u></p> <ul style="list-style-type: none"> <li>Name</li> <li>Entity Type (description)</li> <li>Organization</li> <li>Department</li> <li>Phone / Ext</li> <li>Phone 2 / Ext</li> <li>Relationship</li> </ul> <p><u>Optional Columns</u></p> <ul style="list-style-type: none"> <li>Creation Date</li> <li>Creator Code / Name</li> <li>Reviser Code / Name</li> <li>Revision Date</li> </ul> | <p><u>Default Visible Columns:</u></p> <ul style="list-style-type: none"> <li>Name</li> <li>Matter Name</li> <li>Entity Role (description)</li> <li>Organization</li> <li>Department</li> <li>Phone / Ext</li> <li>Phone 2 / Ext</li> <li>Relationship</li> </ul> <p><u>Optional Columns</u></p> <ul style="list-style-type: none"> <li>Creation Date</li> <li>Creator Code / Name</li> <li>Entity Type (description)</li> <li>Reviser Code / Name</li> <li>Revision Date</li> </ul> |

Sort Ascending  
Sort Descending

- Name
- Entity Type
- Matter
- Entity Role
- Organization
- Department
- Phone / Ext
- Phone 2 / Ext
- Relationship

More Columns...

Save Grid Layout

|            |           |
|------------|-----------|
| New        | Ctrl+N    |
| Open       | Ctrl+O    |
| Delete     | Ctrl+D    |
| Print List | Ctrl+P    |
| Close      | Ctrl + F4 |

| General    | Description  |
|------------|--|
| Help ID    | Entity.RelatedEntities   |
| Title      | Related Entities for [Entity.Name.Here]  |
| Usage      | Displays a list of related entities for a selected entity on the Global Entity Listing   |
| Type       | Modal Window – Designed at 640 x 480   |
| Open Focus | Close Button   |
| Tab Order  | <ol style="list-style-type: none"> <li>1. Entity-specific Only</li> <li>2. Matter-specific Only</li> <li>3. Grid</li> <li>4. New</li> <li>5. Print List</li> <li>6. Delete</li> <li>7. Open</li> <li>8. Close</li> </ol> |
| Use Cases  | 8.1.1, 8.2.1, 8.2.2, and 8.2.3   |

| Buttons    | Function / Action  | HelpID                           | Hot Key |
|------------|--|----------------------------------|---------|
| New        | Creates a new Related Entity assignment to the active entity.                                    | Entity.RelatedEntities.New       |         |
| Print List | Prints the list of Related Entities – to file or printer – as they are displayed in the listing. | Entity.RelatedEntities.PrintList |         |
| Delete     | Deletes the Related Entity assignment from the active entity.                                    | Entity.RelatedEntities.Delete    |         |
| Open       | Opens the Relationship Properties window.  | Entity.RelatedEntities.Open      |         |
| Close      | Closes the Related Entities window.  | Entity.RelatedEntities.Close     |         |

| Rules and Clarifications |  |
|--------------------------|--|
| 1.                       | The Entity 1 fields are populated with the data for the selected entity on the entity listing.   |
| 2.                       | The default filter is "Entity-specific Relationships Only"   |
| 3.                       | The value in the relationship column is from the "What is Entity 2's relationship with Entity 1?" field.   |
| 4.                       | When "Matter-specific Only" is selected, the Matter Name column appears and is populated with the Search Matter Name of the matter for which the relationship was established.   |
| 5.                       | Each matter-specific relationship is listed when "Matter-specific Only" is selected. This means that Entity 2 can be listed multiple times for Entity 1 – once for each matter where they are related, each differentiated only by matter and roles. |
| 6.                       | When the user clicks Delete, a confirmation dialog box appears, giving the user the opportunity to continue removing the relationship or keep it.  |
| 7.                       | The grid should support hiding/showing columns, sorting by a single column, and quick filter. Advanced filtering and querying do not need to be supported in this release.   |

| Field Label                                  | Definition  | Properties                                | Default | UI Reqd | db Reqd | Help ID                                    | Hot Key |
|--|---|---|---------|---------|---------|--|---------|
| Entity 1 – Department                        | This is the department of Entity 1.   | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Department   |         |
| Entity 1 – Entity Type                       | This is the description from the Entity Type for Entity 1.                    | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Type         |         |
| Entity 1 – Name                              | This is the name of Entity 1.   | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Name         |         |
| Entity 1 – Organization                      | This is the parent organization of Entity 1.                                  | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Organization |         |
| Entity 1 – Phone 1                           | This is Phone 1 from Entity 1's Primary Address.                              | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Phone        |         |
| Entity 1 – Phone 2                           | This is the second phone number from Entity 1's primary address.              | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Phone2       |         |
| Entity 1 – Phone 2 Ext                       | This is the extension from Phone 2.   | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Ext2         |         |
| Entity 1 – Phone Ext                         | This is the extension from Phone 1.   | Read Only                                 | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Ext          |         |
| Relationships to Show – Entity-specific Only | When selected, displays all entity-specific entity relationships for Entity1. | Option in the "Relationships to Show" set | Yes     | n/a     | n/a     | Entity.RelatedEntities.ShowEntityOnly      |         |
| Relationships to Show – Matter-specific Only | When selected, displays all matter-specific entity relationships for Entity1. | Option in the "Relationships to Show" set | n/a     | n/a     | n/a     | Entity.RelatedEntities.ShowMatterOnly      |         |

| Column Heading | Definition  | HelpID                                   | Hot Key |
|----------------|---|--|---------|
| Creation Date  | This is the date/time the relationship was created.                                     | Entity.RelatedEntities.CreationDate      |         |
| Creator Code   | This is the Code of the user who created the relationship record.                       | Entity.RelatedEntities.CreatorCode       |         |
| Creator Name   | This is the full Name (composite form) of the user who created the relationship record. | Entity.RelatedEntities.CreatorName       |         |
| Department     | This is the Department from Entity 2.   | Entity.RelatedEntities.Entity2Department |         |

| Column Heading | Definition  | HelpID                                     | Hot Key |
|----------------|---|--|---------|
| Entity Role    | This is the role of the entity in the selected matter. This column is only available if Matter-specific is selected.                    | Entity.RelatedEntities.Entity2EntityRole   |         |
| Entity Type    | This is the description from the Entity Type for Entity 2.  | Entity.RelatedEntities.Entity2EntityType   |         |
| Matter Name    | This is the name of the matter from matter-specific entity relationships. This column is only available if Matter-specific is selected. | Entity.RelatedEntities.Entity2Matter       |         |
| Name           | This is the name of Entity 2.   | Entity.RelatedEntities.Entity2Name         |         |
| Organization   | This is the parent organization of Entity 2.  | Entity.RelatedEntities.Entity2Organization |         |
| Phone / Ext    | This is the Phone and Extension from Primary Address for Entity 2.  | Entity.RelatedEntities.Entity2Phone        |         |
| Phone 2 / Ext  | This is Phone 2 and Extension from Primary Address for Entity 2.  | Entity.RelatedEntities.Entity2Phone2       |         |
| Relationship   | This is the value from the "What is Entity 2's relationship with Entity 1?" field.  | Entity.RelatedEntities.Relationship        |         |
| Reviser Code   | This is the Code of the user who last revised the relationship record.  | Entity.RelatedEntities.ReviserCode         |         |
| Reviser Name   | This is the full Name (composite form) of the user who last revised the relationship record.  | Entity.RelatedEntities.ReviserName         |         |
| Revision Date  | This is the date/time the relationship record was last revised.   | Entity.RelatedEntities.RevisionDate        |         |

| Rev No. | Rev Date   | Rev By | Revision Description   |
|---------|------------|--------|--|
| 1.1     | 02/18/2002 | TAF    | Add short-cut menus to graphic.<br>Changed Add to New.<br>Changed Remove to Delete.<br>Added additional fields/columns for Creation and Revision.<br>Removed ability to view all relationships at once due to issues with data structure and litigation screen logic.<br>Added Entity Role to columns. |
|         |            |        |  |

7.2. Related Entities Listing – Opened from Matter Entity Listing

Related Entities for [entity.name.here]

Entity 1

Name  Entity Role

Phone  Ext  Organization

Phone 2  Ext  Department

Related Entities

Relationships to Show:  Entity-specific Only  Matter-specific Only  Active Matter Only

| RELATED ENTITIES GRID<br>ENTITY-SPECIFIC ONLY  | RELATED ENTITIES GRID<br>MATTER-SPECIFIC ONLY  |
|--|--|
| <p><u>Default Visible Columns:</u></p> <ul style="list-style-type: none"> <li>Name</li> <li>Entity Type (description)</li> <li>Organization</li> <li>Department</li> <li>Phone / Ext</li> <li>Phone 2 / Ext</li> <li>Relationship</li> </ul> <p><u>Optional Columns</u></p> <ul style="list-style-type: none"> <li>Creation Date</li> <li>Creator Code / Name</li> <li>Reviser Code / Name</li> <li>Revision Date</li> </ul> | <p><u>Default Visible Columns:</u></p> <ul style="list-style-type: none"> <li>Name</li> <li>Matter Name</li> <li>Entity Role (description)</li> <li>Organization</li> <li>Department</li> <li>Phone / Ext</li> <li>Phone 2 / Ext</li> <li>Relationship</li> </ul> <p><u>Optional Columns</u></p> <ul style="list-style-type: none"> <li>Creation Date</li> <li>Creator Code / Name</li> <li>Entity Type (description)</li> <li>Reviser Code / Name</li> <li>Revision Date</li> </ul> |

Sort Ascending  
Sort Descending

- Name
- Entity Type
- Matter
- Entity Role
- Organization
- Department
- Phone / Ext
- Phone 2 / Ext
- Relationship

More Columns...

Save Grid Layout

|            |           |
|------------|-----------|
| New        | Ctrl+N    |
| Open       | Ctrl+O    |
| Delete     | Ctrl+D    |
| Print List | Ctrl+P    |
| Close      | Ctrl + F4 |

| General    | Description   |
|------------|---|
| Help ID    | MatterEntity.RelatedEntities  |
| Title      | Related Entities for [Entity.Name.Here]   |
| Usage      | Displays a list of related entities for a selected entity on the Matter Entity Listing  |
| Type       | Modal Window – Designed at 640 x 480  |
| Open Focus | Role (field)  |
| Tab Order  | 1. Entity Role – ALL (button)<br>2. Entity-specific Only<br>3. Matter-specific Only<br>4. Active Matter Only<br>5. Grid<br>6. New<br>7. Print List<br>8. Delete<br>9. Open<br>10. Close<br>11. Entity |
| Use Cases  | 8.1.2, 8.2.1, 8.2.2, and 8.2.3  |

| Buttons           | Function / Action  | HelpID                                 | Hot Key |
|-------------------|--|--|---------|
| Close             | Closes the Related Entities window.  | Entity.RelatedEntities.Close           |         |
| Delete            | Deletes the Related Entity assignment from the active entity.                    | Entity.RelatedEntities.Delete          |         |
| Entity Role – All | When selected, displays relationships for all of Entity 1's roles in the matter. | Entity.RelatedEntities.EntityRoles.All |         |
| New               | Creates a new Related Entity assignment to the active entity.                    | Entity.RelatedEntities.New             |         |

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| Buttons    | Function / Action  | HelpID                           | Hot Key |
|------------|--|----------------------------------|---------|
| Open       | Opens the Relationship Properties window.  | Entity.RelatedEntities.Open      |         |
| Print List | Prints the list of Related Entities – to file or printer – as they are displayed in the listing. | Entity.RelatedEntities.PrintList |         |

| Rules and Clarifications  |
|---|
| 1. The Entity 1 fields are populated with the data for the selected entity on the matter-entity listing.  |
| 2. If Entity 1 has more than one role in the matter, the user can select which role to show relationships for, or choose ALL to show all relationships within the matter. ALL is selected by default  |
| 3. If Entity-specific is selected or "Active Matter Only" is not checked, Entity Role – ALL is selected by default, and cannot be changed.  |
| 4. Each matter can have only one matter-specific relationship between two entities for each role.   |
| 5. Two entities can have relationships defined for one or more matters.   |
| 6. When "Matter-specific Only" is selected, the Matter Name column appears and is populated with the Search Matter Name of the matter for which the relationship was established.   |
| 7. When "Matter-specific Only" is selected, "Active Matter Only" field is enabled.  |
| 8. If "Active Matter Only" is checked, the list is filtered to only show relationships from the active matter from which this window was opened for the selected entity (Entity 1).   |
| 9. Each matter-specific relationship is listed when "Matter-specific Only" is selected. This means that Entity 2 can be listed multiple times for Entity 1 – once for each matter where they are related, each differentiated only by matter and roles. |
| 10. When the user clicks Delete, a confirmation dialog box appears, giving the user the opportunity to continue removing the relationship or keep it.   |
| 11. The grid should support hiding/showing columns, sorting by a single column, and quick filter. Advanced filtering and querying do not need to be supported in this release.  |

| Field Label             | Definition   | Properties | Default | UI Reqd | db Reqd | HelpID                                     | Hot Key |
|-------------------------|--|------------|---------|---------|---------|--|---------|
| Entity 1 – Department   | This is the department of Entity 1.                              | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Department   |         |
| Entity 1 – Entity Type  | This is the description from the Entity Type for Entity 1.       | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Type         |         |
| Entity 1 – Name         | This is the name of Entity 1.                                    | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Name         |         |
| Entity 1 – Organization | This is the parent organization of Entity 1.                     | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Organization |         |
| Entity 1 – Phone 1      | This is Phone 1 from Entity 1's Primary Address.                 | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Phone        |         |
| Entity 1 – Phone 1 Ext  | This is the extension from Phone 1.                              | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Ext          |         |
| Entity 1 – Phone 2      | This is the second phone number from Entity 1's primary address. | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Phone2       |         |
| Entity 1 – Phone 2 Ext  | This is the extension from Phone 2.                              | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Ext2         |         |

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| Field Label                    | Definition   | Properties   | Default | UI Reqd | db Reqd | HelpID                                     | Hot Key |
|--------------------------------|--|--|---------|---------|---------|--|---------|
| Entity 1 – Role                | This is a list of each role Entity 1 is assigned into the matter. The selection filters the listing to only show assignments related to that role. If ALL is selected, then all relationships are displayed, and the words "All Assigned Roles" appear in the field as read-only text. | Drop-down list   | ALL     | n/a     | n/a     | Entity.RelatedEntities.Entity1Roles        |         |
| Include – Active Matter Only   | When checked, the list is filtered to only show relationships from the active matter from which this window was opened for the selected entity (Entity 1).   | Checkbox – Enabled if All or Matter-specific Only is selected. | Yes     | N       | N       | Entity.RelatedEntities.IncludeActiveMatter |         |
| Include – Entity-specific Only | When selected, displays all entity-specific entity relationships for Entity1.  | Option in the "Include" set                                    | n/a     | n/a     | n/a     | Entity.RelatedEntities.IncludeEntityOnly   |         |
| Include – Matter-specific Only | When selected, displays all matter-specific entity relationships for Entity1.  | Option in the "Include" set                                    | Yes     | n/a     | n/a     | Entity.RelatedEntities.IncludeMatterOnly   |         |

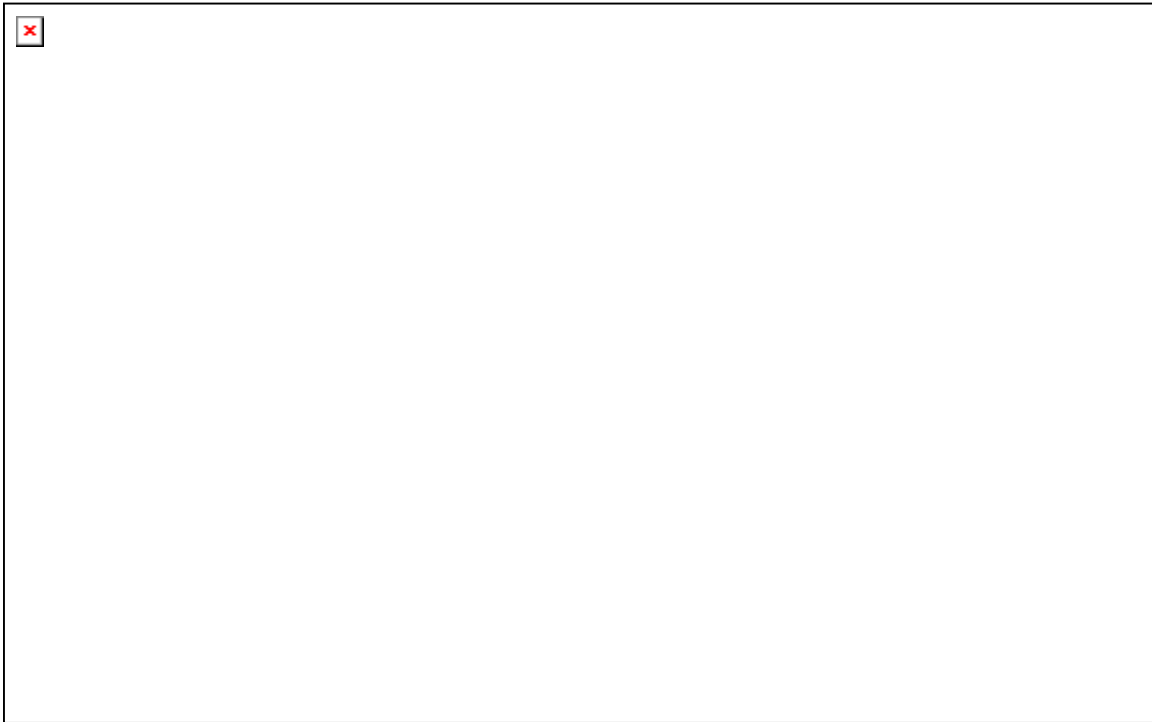
| Column Heading         | Definition  | HelpID                                      | Hot Key |
|------------------------|---|---|---------|
| Creation Date          | This is the date/time the relationship was created.   | Entity.RelatedEntities.CreationDate         |         |
| Creator Code           | This is the Code of the user who created the relationship record.   | Entity.RelatedEntities.CreatorCode          |         |
| Creator ID             | This is the ID of the user who created the relationship record.   | Entity.RelatedEntities.CreatorID            |         |
| Creator Name           | This is the full Name (composite form) of the user who created the relationship record.   | Entity.RelatedEntities.CreatorName          |         |
| Department             | This is the Department from Entity 2.   | Entity.RelatedEntities.Entity2Department    |         |
| Entity Relationship ID | This is the identifier of the relationship record.  | Entity.RelatedEntities.EntityRelationshipID |         |
| Entity Role            | This is the role of the entity in the selected matter. This column is only available if Matter-specific is selected.                    | Entity.RelatedEntities.Entity2EntityRole    |         |
| Entity Type            | This is the description from the Entity Type for Entity 2.  | Entity.RelatedEntities.Entity2EntityType    |         |
| Matter Name            | This is the name of the matter from matter-specific entity relationships. This column is only available if Matter-specific is selected. | Entity.RelatedEntities.Entity2Matter        |         |
| Name                   | This is the name of Entity 2.   | Entity.RelatedEntities.Entity2Name          |         |

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| Column Heading | Definition   | HelpID                                     | Hot Key |
|----------------|--|--|---------|
| Organization   | This is the parent organization of Entity 2.   | Entity.RelatedEntities.Entity2Organization |         |
| Phone / Ext    | This is the Phone and Extension from Primary Address for Entity 2.                           | Entity.RelatedEntities.Entity2Phone        |         |
| Phone 2 / Ext  | This is Phone 2 and Extension from Primary Address for Entity 2.                             | Entity.RelatedEntities.Entity2Phone2       |         |
| Relationship   | This is the value from the "What is Entity 2's relationship with Entity 1?" field.           | Entity.RelatedEntities.Relationship        |         |
| Reviser Code   | This is the Code of the user who last revised the relationship record.                       | Entity.RelatedEntities.ReviserCode         |         |
| Reviser ID     | This is the ID of the user who last revised the relationship record.                         | Entity.RelatedEntities.ReviserID           |         |
| Reviser Name   | This is the full Name (composite form) of the user who last revised the relationship record. | Entity.RelatedEntities.ReviserName         |         |
| Revision Date  | This is the date/time the relationship record was last revised.                              | Entity.RelatedEntities.RevisionDate        |         |

| Rev No. | Rev Date   | Rev By | Revision Description  |
|---------|------------|--------|---|
| 1.1     | 02/18/2002 | TAF    | Changed Add to New.<br>Changed Remove to Delete.<br>Added additional fields/columns for Creation and Revision.<br>Removed ability to view all relationships at once due to issues with data structure and litigation screen logic.<br>Added Entity Role to columns.<br>Change Entity 1 Role to a lookup with a ALL button, for filtering. |
|         |            |        |   |

7.3. Entity DE - Related Entities Listing



| General    | Description  |
|------------|--|
| Help ID    | EntityDE.RelatedEntities   |
| Title      | Entity - [Entity.Name.Here] (window title) / Related Entities (tab)  |
| Usage      | Displays a list of related entities for the active entity.   |
| Type       | Tab  |
| Open Focus | Entity-specific Only   |
| Tab Order  | 1. Matter-specific Only<br>2. Active Matter Only (only visible if Entity DE was opened from the Matter-Entity Listing)<br>3. Entity Role<br>4. Entity Role - ALL<br>5. Grid<br>6. New<br>7. Delete<br>8. Open<br>9. Entity-specific Only |
| Use Cases  | 8.1.3, 8.1.4, 8.2.1, 8.2.2, and 8.2.3  |

| Buttons           | Function / Action  | HelpID                                 | Hot Key |
|-------------------|--|--|---------|
| Delete            | Deletes the Related Entity assignment from the active entity.                    | EntityDE.RelatedEntities.Delete        |         |
| Entity Role – All | When selected, displays relationships for all of Entity 1's roles in the matter. | Entity.RelatedEntities.EntityRoles.All |         |
| New               | Creates a new Related Entity assignment to the active entity.                    | EntityDE.RelatedEntities.New           |         |
| Open              | Opens the Relationship Properties window.  | EntityDE.RelatedEntities.Open          |         |



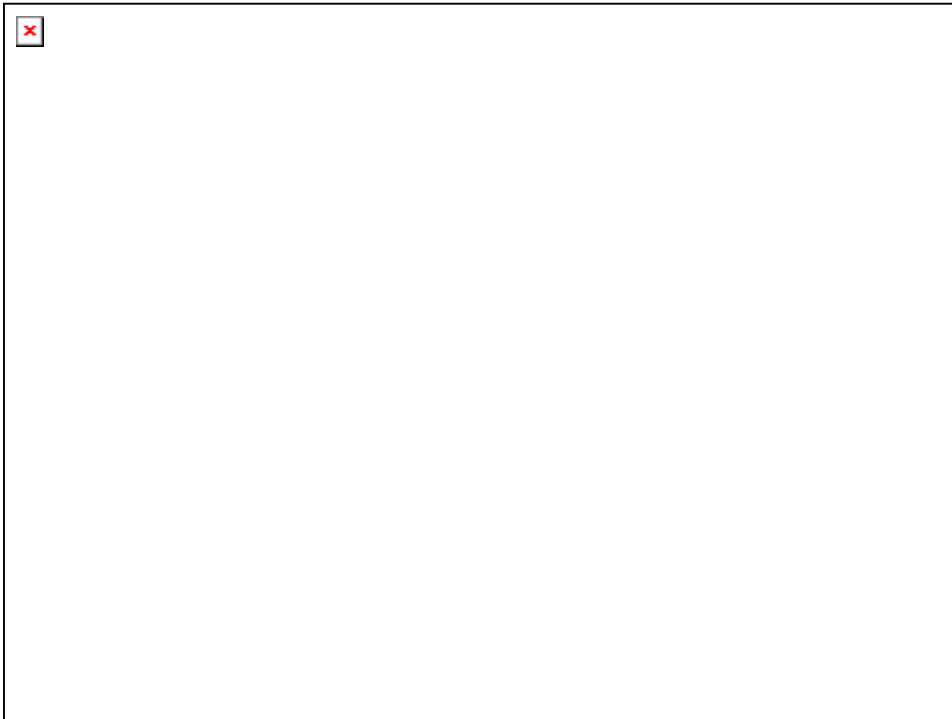
| Rules and Clarifications |   |
|--------------------------|---|
| 1.                       | The default filters (include) are as follows: <ul style="list-style-type: none"> <li>• If the Entity DE was opened from the Global Entity Listing, use "Entity-specific Only"</li> <li>• If the Entity DE was opened from the Matter-Entity Listing, use "Matter-specific Only" with "Active Matter Only" checked.</li> </ul> |
| 2.                       | If Entity 1 has more than one role in the matter, the user can select which role to show relationships for, or choose ALL to show all relationships within the matter.  |
| 3.                       | If Entity-specific is selected or "Active Matter Only" is not checked, Entity Role – ALL is selected by default, and cannot be changed.   |
| 4.                       | The value in the relationship column is from the "What is Entity 2's relationship with Entity 1?" field.  |
| 5.                       | When "Matter-specific Only" is selected, the Matter Name column appears and is populated with the Search Matter Name of the matter for which the relationship was established.  |
| 6.                       | When "Matter-specific Only" is selected, "Active Matter Only" field is enabled.   |
| 7.                       | If "Active Matter Only" is checked, the list is filtered to only show relationships from the active matter from which this window was opened for the selected entity (Entity 1).  |
| 8.                       | Each matter-specific relationship is listed when "Matter-specific Only" is selected. This means that Entity 2 can be listed multiple times for Entity 1 – once for each matter where they are related, each differentiated only by matter and roles.  |
| 9.                       | When the user clicks Delete, a confirmation dialog box appears, giving the user the opportunity to continue deleting the relationship or keep it.   |
| 10.                      | The grid should support hiding/showing columns, sorting by a single column, and quick filter. Advanced filtering and querying do not need to be supported in this release.  |

| Field Label                                  | Definition   | Properties  | Default | UI Reqd | db Reqd | HelpID                                    | Hot Key |
|--|--|---|---------|---------|---------|---|---------|
| Entity 1 – Role                              | This is a list of each role Entity 1 is assigned into the matter. The selection filters the listing to only show assignments related to that role. If ALL is selected, then all relationships are displayed, and the words "All Assigned Roles" appear in the field as read-only text. | Drop-down list  | ALL     | n/a     | n/a     | Entity.RelatedEntities.Entity1Roles       |         |
| Relationships to Show – Active Matter Only   | When checked, the list is filtered to only show relationships from the active matter from which this window was opened for the selected entity (Entity 1).   | Checkbox – Enabled if Matter-specific Only is selected. | Yes     | N       | N       | EntityDE.RelatedEntities.ShowActiveMatter |         |
| Relationships to Show – Entity-specific Only | When selected, displays all entity-specific entity relationships for Entity1.  | Option in the "Relationships to Show " set              | n/a     | n/a     | n/a     | EntityDE.RelatedEntities.ShowEntityOnly   |         |
| Relationships to Show – Matter-specific Only | When selected, displays all matter-specific entity relationships for Entity1.  | Option in the "Relationships to Show " set              | Yes     | n/a     | n/a     | EntityDE.RelatedEntities.ShowMatterOnly   |         |

| Column Heading | Definition  | Help ID                                      | Hot Key |
|----------------|---|--|---------|
| Creation Date  | This is the date/time the relationship was created.   | Entity.RelatedEntities.CreationDate          |         |
| Creator Code   | This is the Code of the user who created the relationship record.   | Entity.RelatedEntities.CreatorCode           |         |
| Creator Name   | This is the full Name (composite form) of the user who created the relationship record.   | Entity.RelatedEntities.CreatorName           |         |
| Department     | This is the Department from Entity 2.   | EntityDE.RelatedEntities.Entity2Department   |         |
| Entity Role    | This is the role of the entity in the selected matter. This column is only available if Matter-specific is selected.                    | EntityDE.RelatedEntities.Entity2EntityRole   |         |
| Entity Type    | This is the description from the Entity Type for Entity 2.  | EntityDE.RelatedEntities.Entity2EntityType   |         |
| Matter Name    | This is the name of the matter from matter-specific entity relationships. This column is only available if Matter-specific is selected. | EntityDE.RelatedEntities.Entity2Matter       |         |
| Name           | This is the name of Entity 2.   | EntityDE.RelatedEntities.Entity2Name         |         |
| Organization   | This is the parent organization of Entity 2.  | EntityDE.RelatedEntities.Entity2Organization |         |
| Phone / Ext    | This is the Phone and Extension from Primary Address for Entity 2.  | EntityDE.RelatedEntities.Entity2Phone        |         |
| Phone 2 / Ext  | This is Phone 2 and Extension from Primary Address for Entity 2.  | EntityDE.RelatedEntities.Entity2Phone2       |         |
| Relationship   | This is the value from the "What is Entity 2's relationship with Entity 1?" field.  | EntityDE.RelatedEntities.Relationship        |         |
| Reviser Code   | This is the Code of the user who last revised the relationship record.  | Entity.RelatedEntities.ReviserCode           |         |
| Reviser ID     | This is the ID of the user who last revised the relationship record.  | Entity.RelatedEntities.ReviserID             |         |
| Reviser Name   | This is the full Name (composite form) of the user who last revised the relationship record.  | Entity.RelatedEntities.ReviserName           |         |
| Revision Date  | This is the date/time the relationship record was last revised.   | Entity.RelatedEntities.RevisionDate          |         |

| Rev No. | Rev Date   | Rev By | Revision Description  |
|---------|------------|--------|---|
| 1.1     | 02/18/2002 | TAF    | Changed Add to New.<br>Changed Remove to Delete.<br>Added additional fields/columns for Creation and Revision.<br>Removed ability to view All relationships at once due to issues with data structure and litigation screen logic.<br>Added Entity Role to columns. |
|         |            |        |   |

7.4. Entity DE - Related Tree - Entities



| General    | Description  |
|------------|--|
| Help ID    | EntityDE.RelatedTree.Entities  |
| Title      | Entity - [Entity.Name.Here] (window title) / Related Tree (tab) / Entities (branch)  |
| Usage      | Displays a list of related entities for the active entity.   |
| Type       | Tree Branch  |
| Open Focus | Timeline   |
| Tab Order  | <ol style="list-style-type: none"> <li>1. Entity-specific Only</li> <li>2. Matter-specific Only</li> <li>3. Active Matter Only (only visible if Entity DE was opened from the Matter-Entity Listing)</li> <li>4. Role (field)</li> <li>5. Role – ALL (button)</li> <li>6. Tree</li> <li>7. Letterhead</li> <li>8. Notes</li> <li>9. Save</li> <li>10. Close</li> <li>11. Related Tree (tab)</li> <li>12. Timeline</li> </ol> |
| Use Cases  | 8.1.5, 8.1.6, 8.2.1, 8.2.2, and 8.2.3  |

| Buttons      | Function / Action  | HelpID                                    | Hot Key |
|--------------|--|---|---------|
| Add          | Adds a new Related Entity assignment to the active entity.   | EntityDE.RelatedTree.Entities.Add         |         |
| Clear Filter | Clears any filter applied to the tree, and resets the defaults. This functionality, however, is not fully supported by the Related Entities Listing. | EntityDE.RelatedTree.Entities.ClearFilter |         |

| Buttons           | Function / Action  | HelpID                                 | Hot Key |
|-------------------|--|--|---------|
| Entity Role – All | When selected, displays relationships for all of Entity 1's roles in the matter.   | Entity.RelatedEntities.EntityRoles.All |         |
| Filter            | Displays the Entity Filter. This functionality, however, is not fully supported by the Related Entities Listing.                         | EntityDE.RelatedTree.Entities.Filter   |         |
| Open              | Opens the Relationship Properties window.  | EntityDE.RelatedTree.Entities.Open     |         |
| Options           | Displays the Sort and Grouping window for the tree. This functionality, however, is not fully supported by the Related Entities Listing. | EntityDE.RelatedTree.Entities.Options  |         |
| Remove            | Remove the Related Entity assignment from the active entity.   | EntityDE.RelatedTree.Entities.Remove   |         |

| Rules and Clarifications   |
|--|
| 1. The default filters (include) are as follows: <ul style="list-style-type: none"> <li>• If the Entity DE was opened from the Global Entity Listing, use "Entity-specific Only"</li> <li>• If the Entity DE was opened from the Matter-Entity Listing, use "Matter-specific Only" with "Active Matter Only" checked.</li> </ul> |
| 2. If Entity 1 has more than one role in the matter, the user can select which role to show relationships for, or choose ALL to show all relationships within the matter.  |
| 3. If Entity-specific is selected or "Active Matter Only" is not checked, Entity Role – ALL is selected by default, and cannot be changed.   |
| 4. The value in the relationship column is from the "What is Entity 2's relationship with Entity 1?" field.  |
| 5. When "Matter-specific Only" is selected, the Matter Name column appears and is populated with the Search Matter Name of the matter for which the relationship was established.  |
| 6. When "Matter-specific Only" is selected, "Active Matter Only" field is enabled.   |
| 7. If "Active Matter Only" is checked, the list is filtered to only show relationships from the active matter from which this window was opened for the selected entity (Entity 1).  |
| 8. Each matter-specific relationship is listed when "Matter-specific Only" is selected. This means that Entity 2 can be listed multiple times for Entity 1 – once for each matter where they are related, each differentiated only by matter and roles.  |
| 9. When the user clicks Delete, a confirmation dialog box appears, giving the user the opportunity to continue deleting the relationship or keep it.   |
| 10. The grid should support hiding/showing columns, sorting by a single column, and quick filter. Advanced filtering and querying do not need to be supported in this release.   |

| Field Label     | Definition   | Properties     | Default | UI Reqd | db Reqd | HelpID                              | Hot Key |
|-----------------|--|----------------|---------|---------|---------|-------------------------------------|---------|
| Entity 1 – Role | This is a list of each role Entity 1 is assigned into the matter. The selection filters the listing to only show assignments related to that role. If ALL is selected, then all relationships are displayed, and the words "All Assigned Roles" appear in the field as read-only text. | Drop-down list | ALL     | n/a     | n/a     | Entity.RelatedEntities.Entity1Roles |         |

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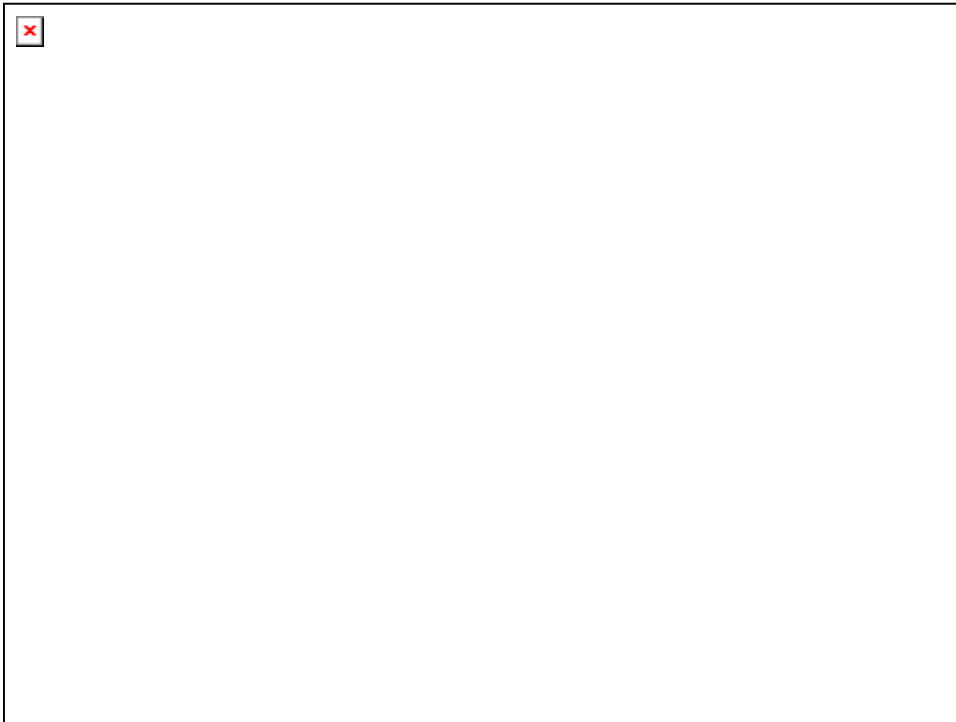
| Field Label                                  | Definition   | Properties  | Default | UI Reqd | db Reqd | HelpID   | Hot Key |
|--|--|---|---------|---------|---------|--|---------|
| Relationships to Show – Active Matter Only   | Appears only when Entities is selected. When checked, the list is filtered to only show relationships from the active matter from which this window was opened for the selected entity (Entity 1). | Checkbox – Enabled if Matter-specific Only is selected. | Yes     | N       | N       | EntityDE.RelatedTree.Entities.ShowActiveMatter |         |
| Relationships to Show – Entity-specific Only | Appears only when Entities is selected. When selected, displays all entity-specific entity relationships for Entity1.  | Option in the "Relationships to Show " set              | n/a     | n/a     | n/a     | EntityDE.RelatedTree.Entities.ShowEntityOnly   |         |
| Relationships to Show – Matter-specific Only | Appears only when Entities is selected. When selected, displays all matter-specific entity relationships for Entity1.  | Option in the "Relationships to Show " set              | Yes     | n/a     | n/a     | EntityDE.RelatedTree.Entities.ShowMatterOnly   |         |
| Timeline                                     | Displays the related tree as a timeline, instead of a tree.  | Checkbox  |         |         |         | EntityDE.RelatedTree.Timeline                  |         |

| Column Heading | Definition  | HelpID  | Hot Key |
|----------------|---|---|---------|
| Creation Date  | This is the date/time the relationship was created.   | EntityDE.RelatedTree.Entities.CreationDate      |         |
| Creator Code   | This is the Code of the user who created the relationship record.   | EntityDE.RelatedTree.Entities.CreatorCode       |         |
| Creator Name   | This is the full Name (composite form) of the user who created the relationship record.   | EntityDE.RelatedTree.Entities.CreatorName       |         |
| Department     | This is the Department from Entity 2.   | EntityDE.RelatedTree.Entities.Entity2Department |         |
| Entity Role    | This is the role of the entity in the selected matter. This column is only available if Matter-specific is selected.                    | EntityDE.RelatedTree.Entities.Entity2EntityRole |         |
| Entity Type    | This is the description from the Entity Type for Entity 2.  | EntityDE.RelatedTree.Entities.Entity2EntityType |         |
| Matter Name    | This is the name of the matter from matter-specific entity relationships. This column is only available if Matter-specific is selected. | EntityDE.RelatedTree.Entities.Entity2Matter     |         |
| Name           | This is the name of Entity 2.   | EntityDE.RelatedTree.Entities.Entity2Name       |         |

| Column Heading | Definition   | HelpID  | Hot Key |
|----------------|--|---|---------|
| Organization   | This is the parent organization of Entity 2.   | EntityDE.RelatedTree.Entities.Entity2Organization |         |
| Phone / Ext    | This is the Phone and Extension from Primary Address for Entity 2.                           | EntityDE.RelatedTree.Entities.Entity2Phone        |         |
| Phone 2 / Ext  | This is Phone 2 and Extension from Primary Address for Entity 2.                             | EntityDE.RelatedTree.Entities.Entity2Phone2       |         |
| Relationship   | This is the value from the "What is Entity 2's relationship with Entity 1?" field.           | EntityDE.RelatedTree.Entities.Relationship        |         |
| Reviser Code   | This is the Code of the user who last revised the relationship record.                       | EntityDE.RelatedTree.Entities.ReviserCode         |         |
| Reviser ID     | This is the ID of the user who last revised the relationship record.                         | EntityDE.RelatedTree.Entities.ReviserID           |         |
| Reviser Name   | This is the full Name (composite form) of the user who last revised the relationship record. | EntityDE.RelatedTree.Entities.ReviserName         |         |
| Revision Date  | This is the date/time the relationship record was last revised.                              | EntityDE.RelatedTree.Entities.RevisionDate        |         |

| Rev No. | Rev Date   | Rev By | Revision Description |
|---------|------------|--------|----------------------|
| 1.1     | 02/18/2002 | TAF    | New                  |
|         |            |        |                      |

7.5. Relationship Properties DE Form – Entity-specific Relationships



| General    | Description  |
|------------|--|
| Help ID    | Entity.RelatedEntities.Properties  |
| Title      | Relationship Properties  |
| Usage      | Used to define an entity-specific relationship   |
| Type       | Modal Window – Designed at 640 x 480   |
| Open Focus | Entity 2 – Name  |
| Tab Order  | 11. What is Entity 2's relationship to Entity 1<br>12. Same<br>13. What is Entity 1's relationship to Entity 2 (if Same is not checked)<br>14. Save<br>15. Close<br>16. Delete<br>17. Name |
| Use Cases  | 8.2.1, 8.2.2, and 8.2.3  |

| Buttons | Function / Action  | HelpID                                   | Hot Key |
|---------|--|--|---------|
| Close   | Closes the Related Entities window.<br>If unsaved changes existing, prompt           | Entity.RelatedEntities.Properties.Close  |         |
| Delete  | Deletes the Related Entity assignment from the active entity, and closes the window. | Entity.RelatedEntities.Properties.Delete |         |
| Save    | Saves the record.  | Entity.RelatedEntities.Properties.Save   |         |

| Rules and Clarifications   |
|--|
| 1. The Entity 1 fields are populated with the data for the selected entity on the entity listing.  |
| 2. The Entity 2 fields are populated with the data for the selected entity in the Entity 2 Name field.   |
| 3. If "Same" is checked, the text from "What is Entity 2's relationship to Entity 1" is copied to the "What is Entity 1's relationship to Entity 2" field, and the "What is Entity 1's relationship to Entity 2" field is set to read-only.  |
| 4. If "Same" is checked, any changes in "What is Entity 2's relationship to Entity 1" automatically change the value in the "What is Entity 1's relationship to Entity 2" field.   |
| 5. Upon save, if a global relationship already exists between the two entities, display a message asking the user if they want to overwrite the existing record. Yes overwrites the record. No returns the user to the Relationship Properties window with the Entity 2 Name field cleared and in focus. |
| 6. When the user clicks Delete, a confirmation dialog box appears, giving the user the opportunity to continue removing the relationship or keeping it.  |
| 7. When the user clicks Close, if there are unsaved changes, a dialog box appears giving them the opportunity to save the changes, discard the changes and continue closing, or canceling and returning to the form without saving the changes.  |

| Field Label             | Definition   | Properties | Default | UI Reqd | db Reqd | HelpID   | Hot Key |
|-------------------------|--|------------|---------|---------|---------|--|---------|
| Entity 1 – Department   | This is the department of Entity 1.                              | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity1 Department   |         |
| Entity 1 – Entity Type  | This is the description from the Entity Type for Entity 1.       | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity1 Type         |         |
| Entity 1 – Name         | This is the name of Entity 1.                                    | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity1 Name         |         |
| Entity 1 – Organization | This is the parent organization of Entity 1.                     | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity1 Organization |         |
| Entity 1 – Phone 1      | This is Phone 1 from Entity 1's Primary Address.                 | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Phone                    |         |
| Entity 1 – Phone 1 Ext  | This is the extension from Phone 1.                              | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity1 Ext          |         |
| Entity 1 – Phone 2      | This is the second phone number from Entity 1's primary address. | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Entity1Phone2                   |         |
| Entity 1 – Phone 2 Ext  | This is the extension from Phone 2.                              | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity1 Ext2         |         |
| Entity 2 – Department   | This is the department of Entity 2.                              | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity2 Department   |         |
| Entity 2 – Entity Type  | This is the description from the Entity Type for Entity 2.       | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity2 Type         |         |
| Entity 2 – Name         | This is the name of Entity 2.                                    | Look-up    | null    | Y       | Y       | Entity.RelatedEntities.Properties.Entity2 Name         |         |
| Entity 2 – Organization | This is the parent organization of Entity 2.                     | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity2 Organization |         |

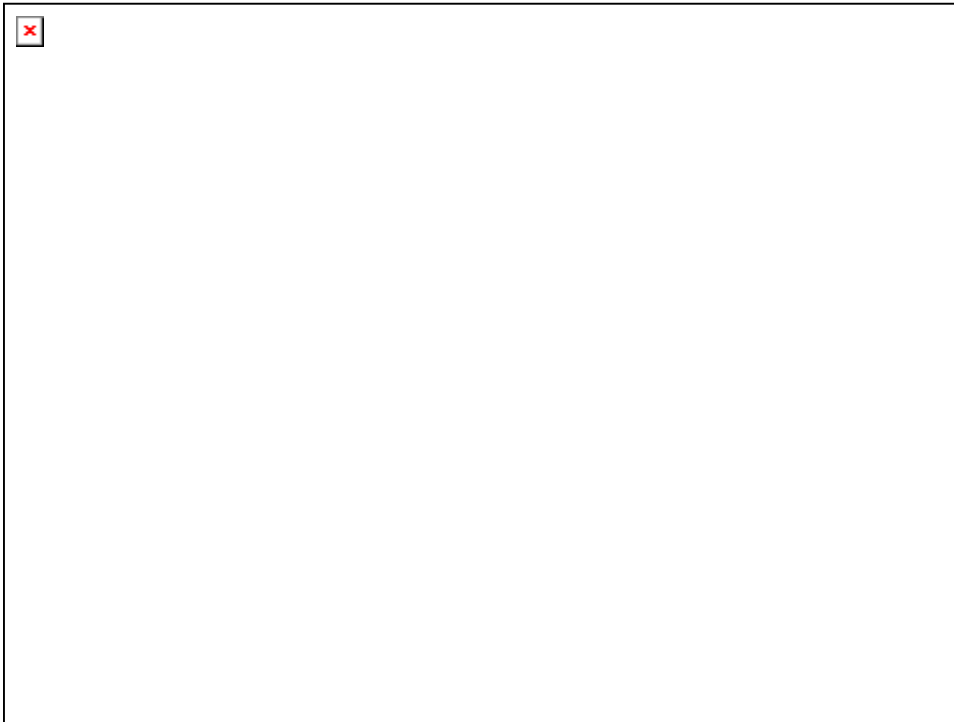


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| Field Label                                  | Definition  | Properties | Default                               | UI Reqd | db Reqd | HelpID  | Hot Key |
|--|---|------------|---------------------------------------|---------|---------|---|---------|
| Entity 2 – Phone 1                           | This is Phone 2 from Entity 2's Primary Address.                              | Read Only  | n/a                                   | n/a     | n/a     | Entity.RelatedEntities.Entity2Phone           |         |
| Entity 2 – Phone 1 Ext                       | This is the extension from Phone 2.   | Read Only  | n/a                                   | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity2Ext  |         |
| Entity 2 – Phone 2                           | This is the second phone number from Entity 2's primary address.              | Read Only  | n/a                                   | n/a     | n/a     | Entity.RelatedEntities.Entity2Phone2          |         |
| Entity 2 – Phone 2 Ext                       | This is the extension from Phone 2.   | Read Only  | n/a                                   | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity2Ext2 |         |
| Same   | If checked, the relationship from the perspective of each entity is the same. | Checkbox   | Null                                  | N       | N       | Entity.RelatedEntities.Same                   |         |
| What is Entity 1's Relationship to Entity 2? | This is the relationship to Entity 1 from the perspective of Entity 2?        | Text(252)  | Null                                  | N       | N       | Entity.RelatedEntities.Entity1Relatio         |         |
| What is Entity 2's Relationship to Entity 1? | This is the relationship to Entity 2 from the perspective of Entity 1?        | Text(252)  | Null<br>Read-Only if Same is checked. | N       | N       | Entity.RelatedEntities.Entity2Relatio         |         |

| Rev No. | Rev Date   | Rev By | Revision Description  |
|---------|------------|--------|---|
| 1.1     | 02/18/2002 | TAF    | Changed Remove to Delete.<br>Removed matter-specific fields, and made this form entity-specific so it can easily respect the ENTRELT table. |

7.6. Relationship Properties DE Form – Matter-specific Relationship



| General    | Description  |
|------------|--|
| Help ID    | MatterEntity.RelatedEntities.Properties  |
| Title      | Relationship Properties  |
| Usage      | Used to define a matter-specific entity relationship.  |
| Type       | Modal Window – Designed at 640 x 480   |
| Open Focus | Entity 2 – Name  |
| Tab Order  | 1. What is Entity 2's relationship to Entity 1<br>2. Same<br>3. What is Entity 1s relationship to Entity 2<br>4. This relationship is specific for this matter)<br>5. Save<br>6. Close<br>7. Delete<br>8. Name |
| Use Cases  | 8.2.1, 8.2.2, and 8.2.3  |

| Buttons | Function / Action  | HelpID   | Hot Key |
|---------|--|--|---------|
| Close   | Closes the Related Entities window.<br>If unsaved changes existing, prompt           | MatterEntity.RelatedEntities.Properties.Close  |         |
| Delete  | Deletes the Related Entity assignment from the active entity, and closes the window. | MatterEntity.RelatedEntities.Properties.Delete |         |
| Save    | Saves the record.  | MatterEntity.RelatedEntities.Properties.Save   |         |

| Rules and Clarifications   |
|--|
| 1. The Entity 1 fields are populated with the data for the selected entity on the entity listing.      |
| 2. The Entity 2 fields are populated with the data for the selected entity in the Entity 2 Name field. |

| Rules and Clarifications   |
|--|
| 3. If "Same" is checked, the text from "What is Entity 2's relationship to Entity 1" is copied to the "What is Entity 1's relationship to Entity 2" field, and the "What is Entity 1's relationship to Entity 2" field is set to read-only.  |
| 4. If "Same" is checked, any changes in "What is Entity 2's relationship to Entity 1" automatically change the value in the "What is Entity 1's relationship to Entity 2" field.   |
| 5. When adding a relationship from within the Matter-Entity Listing, the Matter field is populated with the active (parent) matter (by default).   |
| 6. Upon save, if a relationship already exists between the two entities for the selected matter with the same roles, display a message asking the user if they want to overwrite the existing record. Yes overwrites the record. No returns the user to the Relationship Properties window with the Matter field cleared and in focus. |
| 7. When the user clicks Delete, a confirmation dialog box appears, giving the user the opportunity to continue removing the relationship or keeping it.  |
| 8. When the user clicks Close, if there are unsaved changes, a dialog box appears giving them the opportunity to save the changes, discard the changes and continue closing, or canceling and returning to the form without saving the changes.  |

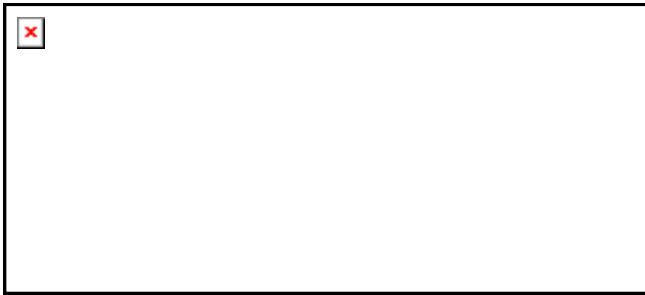
| Field Label             | Definition   | Properties | Default | UI Reqd | db Reqd | HelpID  | Hot Key |
|-------------------------|--|------------|---------|---------|---------|---|---------|
| Entity 1 – Department   | This is the department of Entity 1.  | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity1Department         |         |
| Entity 1 – Entity Role  | This is the description from the Role for Entity 1 in the selected matter. | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Properties.Entity1Role         |         |
| Entity 1 – Name         | This is the name of Entity 1.  | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Properties.Entity1Name         |         |
| Entity 1 – Organization | This is the parent organization of Entity 1.                               | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Properties.Entity1Organization |         |
| Entity 1 – Phone        | This is Phone 1 from Entity 1's Primary Address.                           | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Entity1Phone                   |         |
| Entity 1 – Phone 1 Ext  | This is the extension from Phone 1.  | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Properties.Entity1Ext          |         |
| Entity 1 – Phone 2      | This is the second phone number from Entity 1's primary address.           | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Entity1Phone2                  |         |
| Entity 1 – Phone 2 Ext  | This is the extension from Phone 2.  | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Properties.Entity1Ext2         |         |
| Entity 2 – Department   | This is the department of Entity 2.  | Read Only  | n/a     | n/a     | n/a     | Entity.RelatedEntities.Properties.Entity2Department         |         |
| Entity 2 – Entity Role  | This is the description from the Role for Entity 1 in the selected matter. | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Properties.Entity2Role         |         |
| Entity 2 – Name         | This is the name of Entity 2.  | Look-up    | null    | Y       | Y       | MatterEntity.RelatedEntities.Properties.Entity2Name         |         |
| Entity 2 – Organization | This is the parent organization of Entity 2.                               | Read Only  | n/a     | n/a     | n/a     | MatterEntity.RelatedEntities.Properties.Entity2Organization |         |

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| Field Label                                   | Definition  | Properties | Default                               | UI Reqd      | db Reqd | HelpID  | Hot Key |
|---|---|------------|---------------------------------------|--------------|---------|---|---------|
| Entity 2 – Phone                              | This is Phone 2 from Entity 2's Primary Address.                              | Read Only  | n/a                                   | n/a          | n/a     | MatterEntity.RelatedEntities.Entity2Phone           |         |
| Entity 2 – Phone 1 Ext                        | This is the extension from Phone 2.   | Read Only  | n/a                                   | n/a          | n/a     | MatterEntity.RelatedEntities.Properties.Entity2Ext  |         |
| Entity 2 – Phone 2                            | This is the second phone number from Entity 2's primary address.              | Read Only  | n/a                                   | n/a          | n/a     | MatterEntity.RelatedEntities.Entity2Phone2          |         |
| Entity 2 – Phone 2 Ext                        | This is the extension from Phone 2.   | Read Only  | n/a                                   | n/a          | n/a     | MatterEntity.RelatedEntities.Properties.Entity2Ext2 |         |
| Same  | If checked, the relationship from the perspective of each entity is the same. | Checkbox   | Null                                  | N            | N       | MatterEntity.RelatedEntities.Same                   |         |
| This relationship is specific for this matter | This is the matter for which the relationship is defined.                     | Lookup     | Active (Parent) Matter                | Y if active. | N       | MatterEntity.RelatedEntities.Matter                 |         |
| What is Entity 1's Relationship to Entity 2?  | This is the relationship to Entity 1 from the perspective of Entity 2?        | Text(252)  | Null                                  | N            | N       | MatterEntity.RelatedEntities.Entity1Relatio         |         |
| What is Entity 2's Relationship to Entity 1?  | This is the relationship to Entity 2 from the perspective of Entity 1?        | Text(252)  | Null<br>Read-Only if Same is checked. | N            | N       | MatterEntity.RelatedEntities.Entity2Relatio         |         |

| Rev No. | Rev Date   | Rev By | Revision Description  |
|---------|------------|--------|---|
| 1.1     | 02/18/2002 | TAF    | Changed Remove to Delete.<br>Removed entity-specific fields, and made this form matter-specific so it can easily respect the MATRELT table. |
|         |            |        |   |

7.7. Related Entities – Dialog Box – Confirm Delete



| General    | Description   |
|------------|---|
| Help ID    | RelatedEntities.Dialog.DeleteConfirmation   |
| Title      | Delete Confirmation   |
| Usage      | Allows the user to either confirm deleting an entity relationship, or terminate the action. |
| Type       | Modal dialog box  |
| Open Focus | No  |
| Tab Order  | 1. Yes<br>2. No   |
| Use Cases  | 8.2.3   |

| Buttons | Function / Action  | HelpID                                   | Hot Key |
|---------|--|--|---------|
| No      | Terminates removing the relationship, closing the dialog box, and returning the user to the window from which the dialog box was opened. | RelatedEntities.Dialog.ConfirmRemove.No  |         |
| Yes     | Closes the dialog box and removes the relationship. If the Relationship Properties DE form was open, it is closed, as well.              | RelatedEntities.Dialog.ConfirmRemove.Yes |         |

| Rev No. | Rev Date   | Rev By | Revision Description     |
|---------|------------|--------|--------------------------|
| 1.1     | 02/18/2002 | TAF    | Change Remove to Delete. |
|         |            |        |                          |

7.8. Related Entities – Dialog Box – Relationship Exists – Entity-specific



| General    | Description   |
|------------|---|
| Help ID    | RelatedEntities.Dialog.RelationshipExists.Entity  |
| Title      | Confirm Remove  |
| Usage      | Allows the user to either confirm removing of an existing entity relationship, or terminate the action. |
| Type       | Modal dialog box  |
| Open Focus | Cancel  |
| Tab Order  | 1. Yes<br>2. No<br>3. Cancel  |
| Use Cases  | 8.2.1 and 8.2.2   |

| Buttons | Function / Action  | HelpID  | Hot Key |
|---------|--|---|---------|
| Cancel  | Returns the user to the Relationship Properties DE without overwriting the record.   | RelatedEntities.Dialog.RelationshipExists.Entity.Cancel |         |
| No      | Closes the dialog box without overwriting the existing relationship.<br>If this was the result of clicking Save, the Relationship Properties DE appears.<br>If this was the result of clicking Close and then saving unsaved changes, the Relationship Properties DE closes, and the Related Entities listing appears. | RelatedEntities.Dialog.RelationshipExists.Entity.No     |         |
| Yes     | Closes the dialog box and overwrites the existing relationship.<br>If this was the result of clicking Save, the Relationship Properties DE appears.<br>If this was the result of clicking Close and then saving unsaved changes, the Relationship Properties DE closes, and the Related Entities listing appears.      | RelatedEntities.Dialog.RelationshipExists.Entity.Yes    |         |

| Rev No. | Rev Date | Rev By | Revision Description |
|---------|----------|--------|----------------------|
|         |          |        |                      |
|         |          |        |                      |

7.9. Related Entities – Dialog Box – Relationship Exists – Matter-specific



| General    | Description   |
|------------|---|
| Help ID    | RelatedEntities.Dialog.RelationshipExists.Matter  |
| Title      | Confirm Remove  |
| Usage      | Allows the user to either confirm removing of an existing entity relationship, or terminate the action. |
| Type       | Modal dialog box  |
| Open Focus | Cancel  |
| Tab Order  | 1. Yes<br>2. No<br>3. Cancel  |
| Use Cases  | 8.2.1 and 8.2.2   |

| Buttons | Function / Action  | HelpID  | Hot Key |
|---------|--|---|---------|
| Cancel  | Returns the user to the Relationship Properties DE without overwriting the record.   | RelatedEntities.Dialog.RelationshipExists.Matter.Cancel |         |
| No      | Closes the dialog box without overwriting the existing relationship.<br>If this was the result of clicking Save, the Relationship Properties DE appears.<br>If this was the result of clicking Close and then saving unsaved changes, the Relationship Properties DE closes, and the Related Entities listing appears. | RelatedEntities.Dialog.RelationshipExists.Matter.No     |         |
| Yes     | Closes the dialog box and overwrites the existing relationship.<br>If this was the result of clicking Save, the Relationship Properties DE appears.<br>If this was the result of clicking Close and then saving unsaved changes, the Relationship Properties DE closes, and the Related Entities listing appears.      | RelatedEntities.Dialog.RelationshipExists.Matter.Yes    |         |

| Rev No. | Rev Date | Rev By | Revision Description |
|---------|----------|--------|----------------------|
|         |          |        |                      |
|         |          |        |                      |

7.10. Related Entities – Dialog Box – Unsaved Changes



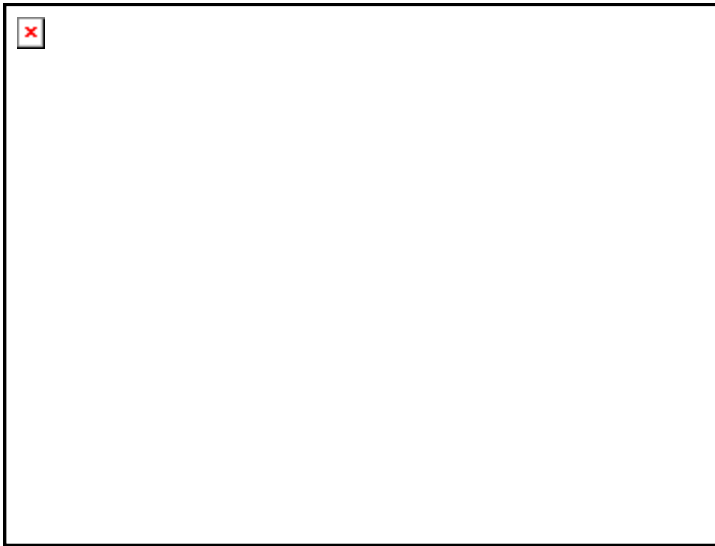
| General    | Description  |
|------------|--|
| Help ID    | RelatedEntities.Dialog.UnsavedChangesExist   |
| Title      | Unsaved Changes Exist  |
| Usage      | Warns the user that they are closing Related Entities form without saving all changes. |
| Type       | Modal dialog box   |
| Open Focus | Yes  |
| Tab Order  | 1. No<br>2. Cancel<br>3. Yes   |
| Use Cases  | 8.2.1 and 8.2.2  |

| Buttons | Function / Action  | HelpID  | Hot Key |
|---------|--|---|---------|
| Cancel  | Closes the dialog box and returns the user to the Relationship Properties form without saving or losing the changes. | RelatedEntities.Dialog.UnsavedChangesExist.Cancel |         |
| No      | Closes the dialog box, and continues closing the Relationship Properties DE form without saving the changes.         | RelatedEntities.Dialog.UnsavedChangesExist.No     |         |
| Yes     | Closes the dialog box, saves the changes, and continues closing the Relationship Properties DE form.                 | RelatedEntities.Dialog.UnsavedChangesExist.Yes    |         |

| Rev No. | Rev Date | Rev By | Revision Description |
|---------|----------|--------|----------------------|
|         |          |        |                      |
|         |          |        |                      |



7.11. Dialog Box – Grid Layout Properties



| General    | Description   |
|------------|---|
| Help ID    | RelatedEntities.Dialog.GridLayoutProperties   |
| Title      | Grid Layout Properties  |
| Usage      | Allows the user to modify and save the grid layout  |
| Type       | Modal dialog box  |
| Open Focus | Close   |
| Tab Order  | 1. Available Fields – Table<br>2. ><br>3. >><br>4. Available Fields listing<br>5. <<br>6. <<<br>7. Move - Up<br>8. Move - Down<br>9. Sort - Asc<br>10. Sort - Desc<br>11. Reset<br>12. Save<br>13. Apply<br>14. Close |
| Use Cases  | 8.1.1, 8.1.2, 8.1.3, and 8.1.4  |

| Buttons | Function / Action  | HelpID  | Hot Key |
|---------|--|---|---------|
| <       | Moves the selected Visible Field to the Available Fields pane.             | RelatedEntities.Dialog.GridLayoutProperties.Unassign    |         |
| <<      | Moves all Visible Fields to the Available Fields pane.                     | RelatedEntities.Dialog.GridLayoutProperties.UnassignAll |         |
| >       | Moves the selected Available Field to the Visible Fields pane.             | RelatedEntities.Dialog.GridLayoutProperties.Assign      |         |
| >>      | Moves all Available Fields to the Visible Fields pane.                     | RelatedEntities.Dialog.GridLayoutProperties.AssignAll   |         |
| Apply   | Closes the window and applies the grid layout without saving the settings. | RelatedEntities.Dialog.GridLayoutProperties.Apply       |         |

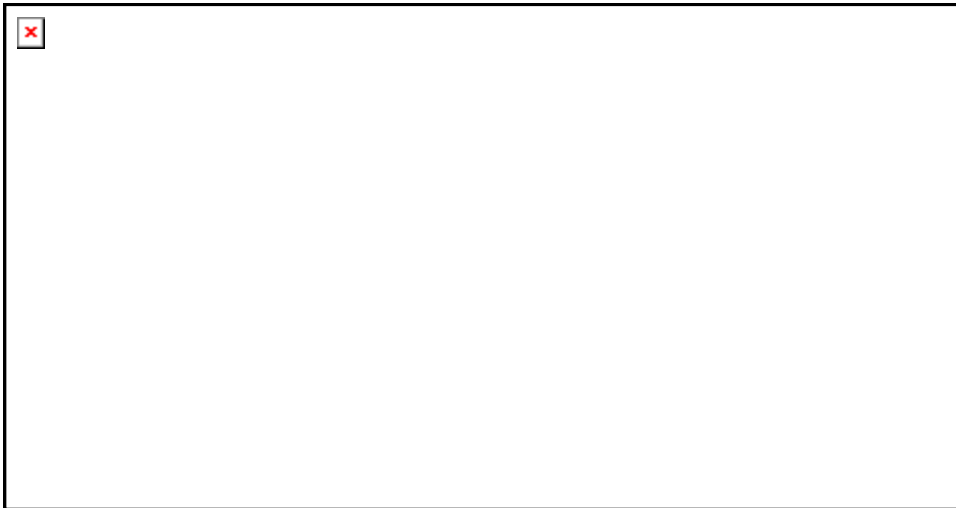
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| Buttons     | Function / Action  | HelpID   | Hot Key |
|-------------|--|--|---------|
| Close       | Closes the Grid Layout Properties.<br>If the settings have been saved, the saved settings are applied. | RelatedEntities.Dialog.GridLayoutProperties.Close    |         |
| Move - Down | Moves the selected Visible Field down (right) in the column order.                                     | RelatedEntities.Dialog.GridLayoutProperties.MoveDown |         |
| Move - Up   | Moves the selected Visible Field up (left) in the column order.  | RelatedEntities.Dialog.GridLayoutProperties.MoveUp   |         |
| Reset       | Resets the Grid Layout Properties to the last saved settings.  | RelatedEntities.Dialog.GridLayoutProperties.Reset    |         |
| Save        | Saves the grid layout.   | RelatedEntities.Dialog.GridLayoutProperties.Save     |         |
| Sort - Asc  | Sorts the grid by the selected Visible Field in ascending order.                                       | RelatedEntities.Dialog.GridLayoutProperties.SortAsc  |         |
| Sort - Desc | Sorts the grid by the selected Visible Field in descending order.                                      | RelatedEntities.Dialog.GridLayoutProperties.SortDesc |         |

| Field Label              | Definition   | Properties          | Default | UI Reqd | db Reqd | HelpID   | Hot Key |
|--------------------------|--|---------------------|---------|---------|---------|--|---------|
| Available Fields - Table | Allows you to filter the list of Available Fields by one of the tables appropriate for the listing.<br>This field does not have to contain the same value as the Visible Fields - Table field. | Drop-down list      | All     | n/a     | n/a     | RelatedEntities.Dialog.GridLayoutProperties.AvailableFieldsTable |         |
| Available Fields         | These are the fields that are available for displaying on the grid, but are currently not visible.   | Scrollable list box | n/a     | n/a     | n/a     | RelatedEntities.Dialog.GridLayoutProperties.AvailableFields      |         |
| Visible Fields - Table   | Allows you to filter the list of Visible Fields by one of the tables appropriate for the listing.<br>This field does not have to contain the same value as the Available Fields - Table field. | Drop-down list      | All     | n/a     | n/a     | RelatedEntities.Dialog.GridLayoutProperties.VisibleFieldsTable   |         |
| Visible Fields           | These are the fields that are currently visible on the grid, in the order they are displayed from left to right (top to bottom on the listing).  | Scrollable list box | n/a     | n/a     | n/a     | RelatedEntities.Dialog.GridLayoutProperties.VisibleFields        |         |

| Rev No. | Rev Date   | Rev By | Revision Description   |
|---------|------------|--------|--|
| 1.1     | 02/18/2002 | TAF    | Modified Move and Sort Buttons to match Report Settings look n'feel. |

7.12. Report Settings – General (tab)



| General    | Description   |
|------------|---|
| Help ID    | RelatedEntities.ReportSettings.General  |
| Title      | Report Settings (window) – General (tab)  |
| Usage      | Allows the user to define the report settings for printing the list of related entities to a file or printer.   |
| Type       | Modal Window – Tab  |
| Open Focus | Report Title  |
| Tab Order  | <ol style="list-style-type: none"> <li>1. Print System Date</li> <li>2. Print</li> <li>3. File</li> <li>4. File (field – if enabled)</li> <li>5. Save To (if enabled)</li> <li>6. Portrait</li> <li>7. Landscape</li> <li>8. Preview</li> <li>9. Print</li> <li>10. Cancel</li> <li>11. Report Title</li> </ol> |
| Use Cases  | 8.1.1, 8.1.2, 8.1.3, and 8.1.4  |

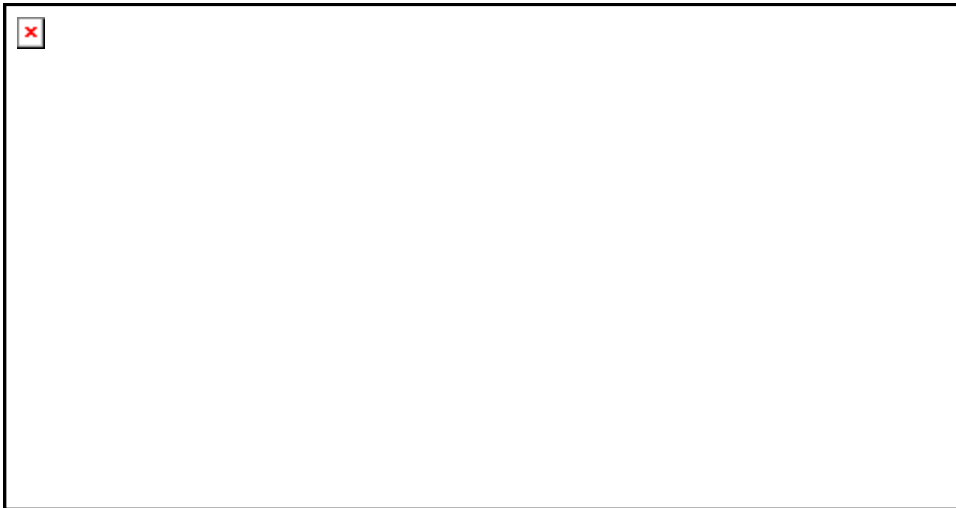
| Buttons | Function / Action  | HelpID  | Hot Key |
|---------|--|---|---------|
| Close   | Closes the Report Settings window.   | RelatedEntities.ReportSettings.Close          |         |
| Preview | Displays a preview of the report.  | RelatedEntities.ReportSettings.Preview        |         |
| Print   | Prints the report to the file or printer, as selected.<br>If Printer is selected as the Print To destination, the Windows Print dialog box appears.              | RelatedEntities.ReportSettings.Print          |         |
| Save To | Displays a dialog, allow the user to choose a folder where the report is to be saved.<br>This button is enabled if File is selected as the Print To destination. | RelatedEntities.ReportSettings.General.SaveTo |         |

| Rules and Clarifications   |
|--|
| 1. If the listing is entity-specific, the default title is "Related Entities Listing for [entityname.here]"                      |
| 2. If the listing is entity-specific, the default file name is "RelEnt_for_[lastname][firstname].txt"                            |
| 3. If the listing is entity-specific, the default title is "Related Entities Listing for [entityname.here] on [mattername.here]" |
| 4. If the listing is entity-specific, the default file name is "RelEnt_for_[lastname][firstname]_on_[matter#].txt"               |

| Field Label     | Definition   | Properties                          | Default                             | UI Reqd | db Reqd | HelpID   | Hot Key |
|-----------------|--|-------------------------------------|-------------------------------------|---------|---------|--|---------|
| File            | Saves the report in the designated file upon clicking Print.   | Optional field in the Print To set. |                                     | n/a     | n/a     | RelatedEntities.ReportSettings.General.File        |         |
| File (filename) | This is the path and filename where the report will be saved. This field is enabled if File is selected as the Print To destination. |                                     | PMROOT + RelatedEntitiesListing.txt | If File | n/a     | RelatedEntities.ReportSettings.General.Filename    |         |
| Printer         | Sends the report to a printer upon clicking Print.   | Optional field in the Print To set. | Selected                            | n/a     | n/a     | RelatedEntities.ReportSettings.General.Printer     |         |
| Report Title    | This is the title of the report as it will appear in the file or printout.   | Text                                | Related Entities Listing            | Y       | n/a     | RelatedEntities.ReportSettings.General.ReportTitle |         |

| Rev No. | Rev Date   | Rev By | Revision Description |
|---------|------------|--------|----------------------|
| 1.1     | 02/18/2002 | TAF    | New.                 |
|         |            |        |                      |

7.13. Report Settings – Custom (tab)



| General    | Description   |
|------------|---|
| Help ID    | RelatedEntities.ReportSettings.Custom   |
| Title      | Report Settings (window) – Custom (tab)   |
| Usage      | Allows the user to customize the column layout for the report. The default layout is the same as that on the listing, but can be changed without changing the listing itself.   |
| Type       | Modal Window – Tab  |
| Open Focus | Show – All  |
| Tab Order  | <ol style="list-style-type: none"> <li>1. Show – Selected Fields</li> <li>2. Available Fields</li> <li>3. &gt;</li> <li>4. &gt;&gt;</li> <li>5. Selected Fields</li> <li>6. &lt;</li> <li>7. &lt;&lt;</li> <li>8. Move – Up</li> <li>9. Move – Down</li> <li>10. Sort – Asc</li> <li>11. Sort – Desc</li> <li>12. Preview</li> <li>13. Print</li> <li>14. Cancel</li> <li>15. Show – All</li> </ol> |
| Use Cases  | 8.1.1, 8.1.2, 8.1.3, and 8.1.4  |

| Buttons | Function / Action   | HelpID  | Hot Key |
|---------|---|---|---------|
| <       | Moves the highlighted Selected Fields to the Available Fields panel, removing them from the report.   | RelatedEntities.ReportSettings.Custom.Unassign    |         |
| <<      | Moves all Selected Fields to the Available Fields panel, removing all from the report.                | RelatedEntities.ReportSettings.Custom.UnassignAll |         |
| >       | Moves the highlighted Available Fields to the Selected Fields panel, making it visible on the report. | RelatedEntities.ReportSettings.Custom.Assign      |         |
| >>      | Moves all Available Fields to the Selected Fields panel, making all fields visible on the report.     | RelatedEntities.ReportSettings.Custom.AssignAll   |         |

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| Buttons     | Function / Action   | HelpID   | Hot Key |
|-------------|---|--|---------|
| Close       | Closes the Report Settings window.  | RelatedEntities.ReportSettings.Close           |         |
| Move – Down | Moves the Selected Field down the list, which translates to right in the column listings.   | RelatedEntities.ReportSettings.Custom.MoveDown |         |
| Move – Up   | Moves the Selected Field up the list, which translates to left in the column listings.  | RelatedEntities.ReportSettings.Custom.MoveUp   |         |
| Preview     | Displays a preview of the report.   | RelatedEntities.ReportSettings.Preview         |         |
| Print       | Prints the report to the file or printer, as selected.<br>If Printer is selected as the Print To destination, the Windows Print dialog box appears. | RelatedEntities.ReportSettings.Print           |         |
| Sort – Asc  | Sorts the list in ascending order by the values in the selected field.  | RelatedEntities.ReportSettings.Custom.SortAsc  |         |
| Sort – Desc | Sorts the list in descending order by the values in the selected field.   | RelatedEntities.ReportSettings.Custom.SortDesc |         |

| Field Label      | Definition  | Properties                      | Default  | UI Reqd | db Reqd | HelpID   | Hot Key |
|------------------|---|---------------------------------|--|---------|---------|--|---------|
| Available Fields | These are the fields which are part of the Related Entities data set, but are currently not included in the report. |                                 |  |         |         | RelatedEntities.ReportSettings.Custom.Available    |         |
| Selected Fields  | These are the fields which are part of the Related Entities data set, that are currently included in the report.    |                                 | By default, this field is populated with the currently selections on the Related Entities listing. |         |         | RelatedEntities.ReportSettings.Custom.Selected     |         |
| Show – All       | When selected, shows all available fields.  | Optional field in the Show set. | Selected   | n/a     | n/a     | RelatedEntities.ReportSettings.Custom.ShowAll      |         |
| Show – Selected  | When selected, only shows those fields which are currently visible on the Related Entities listing.                 | Optional field in the Show set. |  | n/a     | n/a     | RelatedEntities.ReportSettings.Custom.ShowSelected |         |

| Rev No. | Rev Date   | Rev By | Revision Description |
|---------|------------|--------|----------------------|
| 1.1     | 02/18/2002 | TAF    | New                  |
|         |            |        |                      |

7.14. Related Entities Reporting Settings – Dialog Box – Save Report (lookup)

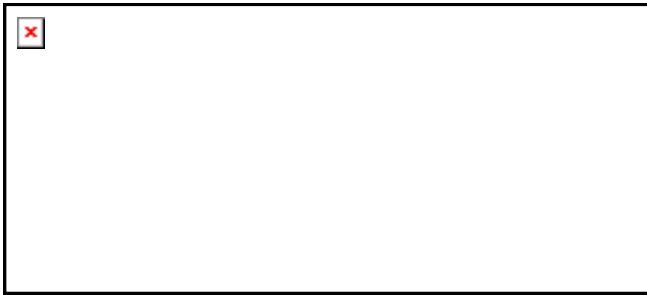


| General    | Description   |
|------------|---|
| Help ID    | RelatedEntities.ReportSettings.Dialog.SaveReportLookup  |
| Title      | Save Report   |
| Usage      | Allows the user to choose the folder and enter a file name for the report. The selections in this window populate the File field on the Report Settings – General tab.  |
| Type       | Modal dialog box  |
| Open Focus | File name   |
| Tab Order  | <ol style="list-style-type: none"> <li>1. File name</li> <li>2. Save as type</li> <li>3. Save</li> <li>4. Cancel</li> <li>5. Save in</li> <li>6. Toolbar</li> <li>7. Folder/File listing</li> <li>8. File name</li> </ol> |
| Use Cases  | 8.1.1, 8.1.2, 8.1.3, and 8.1.4  |

| Buttons    | Function / Action  | HelpID  | Hot Key |
|------------|--|---|---------|
| Cancel     | Cancel the save report function.   | RelatedEntities.ReportSettings.Dialog.SaveReport.Cancel     |         |
| New Folder | Creates a new folder in the current Save in location.                          | RelatedEntities.ReportSettings.Dialog.SaveReport.NewFolder  |         |
| Save       | Saves the report in the selected Save in folder with the designated File name. | RelatedEntities.ReportSettings.Dialog.SaveReport.Save       |         |
| Up Folder  | Moves up one folder level in the Save in location path.                        | RelatedEntities.ReportSettings.Dialog.SaveReport.UpFolder   |         |
| View       | Changes the appearance of the Folder/File listing.                             | RelatedEntities.ReportSettings.Dialog.SaveReport.FolderView |         |

| Rev No. | Rev Date   | Rev By | Revision Description |
|---------|------------|--------|----------------------|
| 1.1     | 02/18/2002 | TAF    | New                  |

7.15. Related Entities Reporting Settings – Dialog Box – Save Report



| General    | Description  |
|------------|--|
| Help ID    | RelatedEntities.ReportSettings.Dialog.SaveReport   |
| Title      | Save Report  |
| Usage      | Advises the user that the target file already exists, and gives them the option of overwriting it or return to the Report Settings window where they can enter a new name. |
| Type       | Modal dialog box   |
| Open Focus | No   |
| Tab Order  | 1. Yes<br>2. No  |
| Use Cases  | 8.1.1, 8.1.2, 8.1.3, and 8.1.4   |

| Buttons | Function / Action  | HelpID   | Hot Key |
|---------|--|--|---------|
| No      | Terminates saving the file, closes the dialog box, and returns the user to the Report Settings window. | RelatedEntities.ReportSettings.Dialog.SaveReport.No  |         |
| Yes     | Closes the dialog box and allows the existing file to be overwritten.                                  | RelatedEntities.ReportSettings.Dialog.SaveReport.Yes |         |

| Rev No. | Rev Date   | Rev By | Revision Description |
|---------|------------|--------|----------------------|
| 1.1     | 02/18/2002 | TAF    | New                  |
|         |            |        |                      |



7.16. Related Entities Reporting Settings – Dialog Box – Save Report – Success



| General    | Description  |
|------------|--|
| Help ID    | RelatedEntities.ReportSettings.Dialog.SaveReport.Success |
| Title      | Success!   |
| Usage      | Advises the user that the report was successfully saved. |
| Type       | Modal dialog box   |
| Open Focus | OK   |
| Tab Order  | 1. OK  |
| Use Cases  | 8.1.1, 8.1.2, 8.1.3, and 8.1.4                           |

| Buttons | Function / Action  | HelpID  | Hot Key |
|---------|--|---|---------|
| OK      | Closes the dialog box and returns the user to the Related Entities Listing | RelatedEntities.ReportSettings.Dialog.SaveReport.Success.OK |         |

| Rev No. | Rev Date   | Rev By | Revision Description |
|---------|------------|--------|----------------------|
| 1.1     | 02/18/2002 | TAF    | New                  |
|         |            |        |                      |

## 8. Use Cases

### 8.1. List Related Entities

List Related Entities use cases include the following subvariations extensions as a matter of convenience in preparing this FDS:

1. Sorting
2. Filtering
3. Modify/Applying/Saving the Grid Layout
4. Print Listing

It is recommended that the product documentation not take such approach, and create individual procedures for each of the above.

#### 8.1.1. List Related Entities from the Global Entity Listing

|                       |  |
|-----------------------|--|
| Goal in Context       | List Related Entities for a selected entity on the Global Entity Listing   |
| Scope & Level         | Same   |
| Preconditions         | The Global Entity Listing is displayed, and the user has the appropriate permissions to display the Entity Relationships.  |
| Success End Condition | The Related Entities window appears for the selected entity with all applicable entity relationships listed.   |
| Failed End Condition  | The Related Entities window does not appear.<br>The Related Entities window appears, but does not display a list of related entities.<br>The Related Entities window appears displaying a list of related entities, but the list is not correct.<br>The Related Entities window appears displaying a list of related entities, but matter or site security is not respected. |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.   |
| Secondary Actors      | None.  |
| Trigger               | The user highlights an entity on the Global Entity Listing, and then chooses to view related entities for that entity.   |

#### STEPS, EXTENSIONS AND SUBVARIATIONS

1. Highlight an entity on the **Global Entity Listing**.
2. Choose Related Entities.
  - a. Right-click, and choose **Related Entities** from the short-cut menu.
  - b. Choose **Related Entities** from the **View** menu.
3. The **Related Entities** window appears.

- a. The **Entity 1** fields are populated with values from the selected entity.
  - b. The **Related Entities** listing is filtered to include **Entity-specific Only** relationships.
  - c. The **Close** button is in focus.
4. Proceed as follows:
- a. Sort the list as needed.
    - i. Double-click on any column heading to sort by the column. Double-click again to reverse the sort order.
    - ii. Right-click on any column heading, and choose **Sort Ascending** or **Sort Descending**.
  - b. Filter the list as needed.
    - i. Use one of the **Relationships to Show** filters:
      - (1) **Entity-specific Only** displays those relationships between two entities that are not matter-specific.
      - (2) **Matter-specific Only** displays those relationship between two entities that are matter-specific.
    - ii. Quick filter on values in the column on which the list is currently filtered:
      - (1) To find values beginning with specific characters, type the characters. As characters are added, the list is further filtered by those characters.
      - (2) To find values containing specific characters, first type an asterisk (\*) or percentage sign (%), followed by the characters. As characters are added, the list is further filtered by those characters.
  - c. Modify the grid layout as needed:
    - i. Right click on any column heading, and choose **More columns**. The **Grid Layout Properties** window appears.
    - ii. Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
    - iii. Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
    - iv. To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
    - v. To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
    - vi. Click **Apply** to close the **Grid Layout Properties** window, displaying the list with the selected grid properties.
    - vii. Click **Save** to save the selections on the **Grid Layout Properties** window, making those selections the default settings for when the grid is opened.
    - viii. Click **Close** to close the window without applying to the grid any changes made the **Grid Layout Properties**. The list appears either with the last saved or last applied settings, whichever was carried out last.
  - d. To quick-save the Grid Layout, right click on any column heading, and choose **Save Grid Layout** from the pop-up menu.
  - e. To print the contents of the grid, click the **Print List** button. The **Report Settings** window appears with the **General** tab active.

- i. Enter a **Report Title**, or accept the default value of "Related Entities Listing for [entity1.name.here]."
- ii. Check **Print System Date** if you want the date to appear on the report.
- iii. Choose a **Print to** destination:
  - (1) To print to a printer, choose **Printer**.
  - (2) To print to a file, choose **File**. The **File** field and **Save To** button are each activated.
    - (a) Enter the path and filename for the resulting report file, or accept the default path and file name.
    - (b) Alternately, you can click **Save To** and choose the path and enter a file name in the **Save Report** window.
- iv. Select a **Page Orientation**, or accept the default orientation as indicated.
- v. Optionally, you can modify the report layout by clicking the **Custom** tab.
  - (1) Click **All** to show all available related entity fields, or click **Selected Fields** to filter the lists by only those fields which were selected for use on the **Related Entities** grid.
  - (2) Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
  - (3) Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
  - (4) To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
  - (5) To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
- vi. Proceed as follows:
  - (1) To preview the report before printing, click **Preview**. The **Report Preview** window appears.
  - (2) To print the report using the specified report settings, click **Print**.
    - (a) If the destination is **Printer**, the Window **Print** dialog box appears.
    - (b) If the destination if **File**, Practice Manager checks to see if the file exists.
      - (i) If the file exists, a message displays allowing the user to overwrite the file or return to the Report Settings window to enter a new file path and name.
      - (ii) If the file does not exist, the report file is created, and a dialog box displays indicating the report was successfully saved.
- vii. After printing, the **Report Settings** window closes.

**RELATED INFORMATION**

|             |   |
|-------------|---|
| Priority    | High  |
| Performance | All operations should take less than 15 seconds from the time the user requests the action. |
| Frequency   | Average   |

|                               |   |
|-------------------------------|---|
| Channels to Actors            | Dialog boxes  |
| Open Issues                   | The current data structure and assignment logic does not allow for both entity-specific and matter-specific entities to appear on the same listing without substantial development effort, and a potential negative impact on performance. For now, the resolution is to at least be able to switch between the two listings from within the same window. |
| Due Date                      | With Salado.  |
| Other Management Information. | None.   |
| Superordinates                | None.   |
| Subordinates                  | 8.2.1, 8.2.2, and 8.2.3   |
| Related Storyboards           | 6.1   |

8.1.2. List Related Entities from the Matter-Entity Listing

|                       |  |
|-----------------------|--|
| Goal in Context       | List Related Entities for a selected entity on the Matter Entity Listing   |
| Scope & Level         | Same   |
| Preconditions         | The Matter Entity Listing is displayed, and the user has the appropriate permissions to display the Entity Relationships.  |
| Success End Condition | The Related Entities window appears for the selected entity with all applicable entity relationships listed.   |
| Failed End Condition  | The Related Entities window does not appear.<br>The Related Entities window appears, but does not display a list of related entities.<br>The Related Entities window appears displaying a list of related entities, but the list is not correct.<br>The Related Entities window appears displaying a list of related entities, but matter or site security is not respected. |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.   |
| Secondary Actors      | None.  |
| Trigger               | The user highlights an entity on the Matter Entity Listing, and then chooses to view related entities for that entity.   |

**STEPS, EXTENSIONS AND SUBVARIATIONS**

1. Highlight an entity on the **Matter-Entity Listing**.
2. Choose Related Entities.
  - a. Right-click, and choose **Related Entities** from the short-cut menu.
  - b. Choose **Related Entities** from the **View** menu.

3. The **Related Entities** window appears.
  - a. The **Entity 1** fields are populated with values from the selected entity.
  - b. The **Related Entities** listing is filtered to include **Matter-specific Only** relationships, with **Active Matter Only** checked.
  - c. The **Entity Role** look-up is in focus.
4. Proceed as follows:
  - a. Sort the list as needed.
    - i. Double-click on any column heading to sort by the column. Double-click again to reverse the sort order.
    - ii. Right-click on any column heading, and choose **Sort Ascending** or **Sort Descending**.
  - b. Filter the list as needed.
    - i. Display entity relationships for all Entity 1's role assignments, or select a specific role assignment.
    - ii. Use one of the **Relationships to Show** filters:
      - (1) **Entity-specific Only** displays those relationships between two entities that are not matter-specific.
      - (2) **Matter-specific Only** displays those relationship between two entities that are matter-specific.
      - (3) Checking **Active Matter Only** displays just those related entities for the matter from which the **Related Entities** window was opened.
    - iii. Quick filter on values in the column on which the list is currently filtered:
      - (1) To find values beginning with specific characters, type the characters. As characters are added, the list is further filtered by those characters.
      - (2) To find values containing specific characters, first type an asterisk (\*) or percentage sign (%), followed by the characters. As characters are added, the list is further filtered by those characters.
  - c. Modify the grid layout as needed:
    - i. Right click on any column heading, and choose **More columns**. The **Grid Layout Properties** window appears.
    - ii. Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
    - iii. Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
    - iv. To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
    - v. To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
    - vi. Click **Apply** to close the **Grid Layout Properties** window, displaying the list with the selected grid properties.
    - vii. Click **Save** to save the selections on the **Grid Layout Properties** window, making those selections the default settings for when the grid is opened.
    - viii. Click **Close** to close the window without applying to the grid any changes made the **Grid Layout Properties**. The list appears either with the last saved or last applied settings, whichever was carried out last.

- d. To quick-save the Grid Layout, right click on any column heading, and choose **Save Grid Layout** from the pop-up menu.
- e. To print the contents of the grid, click the **Print List** button. The **Report Settings** window appears with the **General** tab active.
  - i. Enter a **Report Title**, or accept the default value of "Related Entities Listing for [entity1.name.here]."
  - ii. Check **Print System Date** if you want the date to appear on the report.
  - iii. Choose a **Print to** destination:
    - (1) To print to a printer, choose **Printer**.
    - (2) To print to a file, choose **File**. The **File** field and **Save To** button are each activated.
      - (a) Enter the path and filename for the resulting report file, or accept the default path and file name.
      - (b) Alternately, you can click **Save To** and choose the path and enter a file name in the **Save Report** window.
  - iv. Select a **Page Orientation**, or accept the default orientation as indicated.
  - v. Optionally, you can modify the report layout by clicking the **Custom** tab.
    - (1) Click **All** to show all available related entity fields, or click **Selected Fields** to filter the lists by only those fields which were selected for use on the **Related Entities** grid.
    - (2) Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
    - (3) Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
    - (4) To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
    - (5) To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
  - vi. Proceed as follows:
    - (1) To preview the report before printing, click **Preview**. The **Report Preview** window appears.
    - (2) To print the report using the specified report settings, click **Print**.
      - (a) If the destination is **Printer**, the Window **Print** dialog box appears.
      - (b) If the destination is **File**, Practice Manager checks to see if the file exists.
        - (i) If the file exists, a message displays allowing the user to overwrite the file or return to the Report Settings window to enter a new file path and name.
        - (ii) If the file does not exist, the report file is created, and a dialog box displays indicating the report was successfully saved.
  - vii. After printing, the **Report Settings** window closes.

**RELATED INFORMATION**

|                               |   |
|-------------------------------|---|
| Priority                      | High  |
| Performance                   | All operations should take less than 15 seconds from the time the user requests the action.   |
| Frequency                     | Average   |
| Channels to Actors            | Dialog boxes  |
| Open Issues                   | The current data structure and assignment logic does not allow for both entity-specific and matter-specific entities to appear on the same listing without substantial development effort, and a potential negative impact on performance. For now, the resolution is to at least be able to switch between the two listings from within the same window. |
| Due Date                      | With Salado.  |
| Other Management Information. | None.   |
| Superordinates                | None.   |
| Subordinates                  | 8.2.1, 8.2.2, and 8.2.3   |
| Related Storyboards           | 6.1   |

8.1.3. List Related Entities from Global Entity DE

|                       |   |
|-----------------------|---|
| Goal in Context       | List Related Entities from within an active Entity DE form opened from the Global Entity Listing.   |
| Scope & Level         | Same  |
| Preconditions         | The Entity DE form is active, and was opened from the Global Entity Listing.  |
| Success End Condition | The Related Entities tab appears for the selected entity with all applicable entity relationships listed.   |
| Failed End Condition  | The Related Entities tab appears, but does not display a list of related entities.<br>The Related Entities tab appears displaying a list of related entities, but the list is not correct.<br>The Related Entities tab appears displaying a list of related entities, but matter or site security is not respected. |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.  |
| Secondary Actors      | None.   |
| Trigger               | The user opens an Entity DE form from the Global Entity Listing, and then chooses to view related entities for that entity.   |



## STEPS, EXTENSIONS AND SUBVARIATIONS

1. Highlight an entity on the **Global Entity Listing**, and open it.
2. Click on the **Related Entities** tab.
3. The **Related Entities** window appears.
  - a. The **Related Entities** listing is filtered to include **Entity-specific Only** relationships.
  - b. **Entity-specific Only** is in focus.
4. Proceed as follows:
  - a. Sort the list as needed.
    - i. Double-click on any column heading to sort by the column. Double-click again to reverse the sort order.
    - ii. Right-click on any column heading, and choose **Sort Ascending** or **Sort Descending**.
  - b. Filter the list as needed.
    - i. Use one of the **Relationships to Show** filters:
      - (1) **Entity-specific Only** displays those relationships between two entities that are not matter-specific.
      - (2) **Matter-specific Only** displays those relationships between two entities that are matter-specific.
    - ii. Quick filter on values in the column on which the list is currently filtered:
      - (1) To find values beginning with specific characters, type the characters. As characters are added, the list is further filtered by those characters.
      - (2) To find values containing specific characters, first type an asterisk (\*) or percentage sign (%), followed by the characters. As characters are added, the list is further filtered by those characters.
  - c. Modify the grid layout as needed:
    - i. Right click on any column heading, and choose **More columns**. The **Grid Layout Properties** window appears.
    - ii. Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
    - iii. Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
    - iv. To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
    - v. To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
    - vi. Click **Apply** to close the **Grid Layout Properties** window, displaying the list with the selected grid properties.
    - vii. Click **Save** to save the selections on the **Grid Layout Properties** window, making those selections the default settings for when the grid is opened.
    - viii. Click **Close** to close the window without applying to the grid any changes made the **Grid Layout Properties**. The list appears either with the last saved or last applied settings, whichever was carried out last.

- d. To quick-save the Grid Layout, right click on any column heading, and choose **Save Grid Layout** from the pop-up menu.
- e. To print the contents of the grid, click the **Print List** button. The **Report Settings** window appears with the **General** tab active.
  - i. Enter a **Report Title**, or accept the default value of "Related Entities Listing for [entity1.name.here]."
  - ii. Check **Print System Date** if you want the date to appear on the report.
  - iii. Choose a **Print to** destination:
    - (1) To print to a printer, choose **Printer**.
    - (2) To print to a file, choose **File**. The **File** field and **Save To** button are each activated.
      - (a) Enter the path and filename for the resulting report file, or accept the default path and file name.
      - (b) Alternately, you can click **Save To** and choose the path and enter a file name in the **Save Report** window.
  - iv. Select a **Page Orientation**, or accept the default orientation as indicated.
  - v. Optionally, you can modify the report layout by clicking the **Custom** tab.
    - (1) Click **All** to show all available related entity fields, or click **Selected Fields** to filter the lists by only those fields which were selected for use on the **Related Entities** grid.
    - (2) Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
    - (3) Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
    - (4) To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
    - (5) To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
  - vi. Proceed as follows:
    - (1) To preview the report before printing, click **Preview**. The **Report Preview** window appears.
    - (2) To print the report using the specified report settings, click **Print**.
      - (a) If the destination is **Printer**, the Window **Print** dialog box appears.
      - (b) If the destination is **File**, Practice Manager checks to see if the file exists.
        - (i) If the file exists, a message displays allowing the user to overwrite the file or return to the Report Settings window to enter a new file path and name.
        - (ii) If the file does not exist, the report file is created, and a dialog box displays indicating the report was successfully saved.
  - vii. After printing, the **Report Settings** window closes.

**RELATED INFORMATION**

|                               |   |
|-------------------------------|---|
| Priority                      | High  |
| Performance                   | All operations should take less than 15 seconds from the time the user requests the action.   |
| Frequency                     | Average   |
| Channels to Actors            | Dialog boxes  |
| Open Issues                   | The current data structure and assignment logic does not allow for both entity-specific and matter-specific entities to appear on the same listing without substantial development effort, and a potential negative impact on performance. For now, the resolution is to at least be able to switch between the two listings from within the same window. |
| Due Date                      | With Salado.  |
| Other Management Information. | None.   |
| Superordinates                | None.   |
| Subordinates                  | 8.2.1, 8.2.2, and 8.2.3   |
| Related Storyboards           | 6.1   |

8.1.4. List Related Entities from the Matter-Entity DE

|                       |   |
|-----------------------|---|
| Goal in Context       | List Related Entities from within an active Entity DE form opened from the Matter Entity Listing.   |
| Scope & Level         | Same  |
| Preconditions         | The Entity DE form is active, and was opened from the Matter Entity Listing.  |
| Success End Condition | The Related Entities tab appears for the selected entity with all applicable entity relationships listed.   |
| Failed End Condition  | The Related Entities tab appears, but does not display a list of related entities.<br>The Related Entities tab appears displaying a list of related entities, but the list is not correct.<br>The Related Entities tab appears displaying a list of related entities, but matter or site security is not respected. |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.  |
| Secondary Actors      | None.   |
| Trigger               | The user opens an Entity DE form from the Matter Entity Listing, and then chooses to view related entities for that entity.   |

## STEPS, EXTENSIONS AND SUBVARIATIONS

1. Highlight an entity on the **Matter-Entity Listing**, and open it.
2. Click on the **Related Entities** tab.
3. The **Related Entities** window appears.
  - a. The **Related Entities** listing is filtered to include **Matter-specific Only** relationships, with **Active Matter Only** checked.
  - b. **Entity-specific Only** is in focus, but not selected.
4. Proceed as follows:
  - a. Sort the list as needed.
    - i. Double-click on any column heading to sort by the column. Double-click again to reverse the sort order.
    - ii. Right-click on any column heading, and choose **Sort Ascending** or **Sort Descending**.
  - b. Filter the list as needed.
    - i. Display entity relationships for all Entity 1's role assignments, or select a specific role assignment.
    - ii. Use one of the **Relationships to Show** filters:
      - (1) **Entity-specific Only** displays those relationships between two entities that are not matter-specific.
      - (2) **Matter-specific Only** displays those relationships between two entities that are matter-specific.
      - (3) Checking **Active Matter Only** displays just those related entities for the matter from which the **Entity** DE window was opened.
    - iii. Quick filter on values in the column on which the list is currently filtered:
      - (1) To find values beginning with specific characters, type the characters. As characters are added, the list is further filtered by those characters.
      - (2) To find values containing specific characters, first type an asterisk (\*) or percentage sign (%), followed by the characters. As characters are added, the list is further filtered by those characters.
  - c. Modify the grid layout as needed:
    - i. Right click on any column heading, and choose **More columns**. The **Grid Layout Properties** window appears.
    - ii. Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
    - iii. Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
    - iv. To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
    - v. To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
    - vi. Click **Apply** to close the **Grid Layout Properties** window, displaying the list with the selected grid properties.
    - vii. Click **Save** to save the selections on the **Grid Layout Properties** window, making those selections the default settings for when the grid is opened.

viii. Click **Close** to close the window without applying to the grid any changes made the **Grid Layout Properties**. The list appears either with the last saved or last applied settings, whichever was carried out last.

- d. To quick-save the Grid Layout, right click on any column heading, and choose **Save Grid Layout** from the pop-up menu.
- e. To print the contents of the grid, click the **Print List** button. The **Report Settings** window appears with the **General** tab active.
  - i. Enter a **Report Title**, or accept the default value of "Related Entities Listing for [entity1.name.here]."
  - ii. Check **Print System Date** if you want the date to appear on the report.
  - iii. Choose a **Print to** destination:
    - (1) To print to a printer, choose **Printer**.
    - (2) To print to a file, choose **File**. The **File** field and **Save To** button are each activated.
      - (a) Enter the path and filename for the resulting report file, or accept the default path and file name.
      - (b) Alternately, you can click **Save To** and choose the path and enter a file name in the **Save Report** window.
  - iv. Select a **Page Orientation**, or accept the default orientation as indicated.
  - v. Optionally, you can modify the report layout by clicking the **Custom** tab.
    - (1) Click **All** to show all available related entity fields, or click **Selected Fields** to filter the lists by only those fields which were selected for use on the **Related Entities** grid.
    - (2) Move fields (columns) from the **Available Fields** panel to the **Selected Fields** panel to add them to the grid.
    - (3) Move fields (columns) from the **Selected Fields** panel to the **Available Fields** panel to remove them from the grid.
    - (4) To change the position of a **Selected Field** on the grid, highlight the field label, and click **Move Up** or **Move Down** to move the field (column) left or right, respectively, in the grid.
    - (5) To sort the list by one of the field, highlight the field label in the **Selected Fields** panel and choose **Sort Asc** or **Sort Desc**.
  - vi. Proceed as follows:
    - (1) To preview the report before printing, click **Preview**. The **Report Preview** window appears.
    - (2) To print the report using the specified report settings, click **Print**.
      - (a) If the destination is **Printer**, the Window **Print** dialog box appears.
      - (b) If the destination if **File**, Practice Manager checks to see if the file exists.
        - (i) If the file exists, a message displays allowing the user to overwrite the file or return to the Report Settings window to enter a new file path and name.
        - (ii) If the file does not exist, the report file is created, and a dialog box displays indicating the report was successfully saved.
  - vii. After printing, the **Report Settings** window closes.

**RELATED INFORMATION**

|                               |   |
|-------------------------------|---|
| Priority                      | High  |
| Performance                   | All operations should take less than 15 seconds from the time the user requests the action.   |
| Frequency                     | Average   |
| Channels to Actors            | Dialog boxes  |
| Open Issues                   | The current data structure and assignment logic does not allow for both entity-specific and matter-specific entities to appear on the same listing without substantial development effort, and a potential negative impact on performance. For now, the resolution is to at least be able to switch between the two listings from within the same window. |
| Due Date                      | With Salado.  |
| Other Management Information. | None.   |
| Superordinates                | None.   |
| Subordinates                  | 8.2.1, 8.2.2, and 8.2.3   |
| Related Storyboards           | 6.1   |

8.1.5. List Related Entities from the Global Entity DE in TreeView

|                       |  |
|-----------------------|--|
| Goal in Context       | List Related Entities from within an active Entity DE form opened from the Global Entity Listing using the Related Treeview.   |
| Scope & Level         | Same   |
| Preconditions         | The Entity DE form is active, and was opened from the Global Entity Listing.   |
| Success End Condition | The Related Tree appears for the selected entity, the Entities branch is expanded, all applicable entity relationships are listed.   |
| Failed End Condition  | The Related Tree appears, but Entities does not contain any values.<br>The Related Tree appears, but Entities does contain a list of related entities, but the list is not correct.<br>The Related Tree appears, but Entities does contain a list of related entities, but matter or site security is not respected. |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.   |
| Secondary Actors      | None.  |
| Trigger               | The user opens an Entity DE form from the Global Entity Listing, and then chooses to view related entities for that entity using the treeview.   |

**STEPS, EXTENSIONS AND SUBVARIATIONS**

1. Highlight an entity on the **Global Entity Listing**, and open it.
2. Click on the **Related Tree** tab. The tree appears with a plus sign (+) next to **Entities**.
3. Placing focus on the **Entities** branch displays quick filter options on the tree toolbar.
4. Expand the Entities branch.
  - a. The **Related Entities** listing appears, filtered to include **Entity-specific Only** relationships.
  - b. **Entity-specific Only** is in focus.
5. Proceed as follows:
  - a. Filter the list as needed.
    - i. Use one of the **Relationships to Show** filters:
      - (1) **Entity-specific Only** displays those relationships between two entities that are not matter-specific.
      - (2) **Matter-specific Only** displays those relationships between two entities that are matter-specific.
    - ii. Click Filter to carry out filtering on Entity 2 properties.
  - b. Click **Options** to sort and group the list as needed.
  - c. Click **Options** to modify the grid layout as needed.

**RELATED INFORMATION**

|                               |   |
|-------------------------------|---|
| Priority                      | High  |
| Performance                   | All operations should take less than 15 seconds from the time the user requests the action.   |
| Frequency                     | Average   |
| Channels to Actors            | Dialog boxes  |
| Open Issues                   | The current data structure and assignment logic does not allow for both entity-specific and matter-specific entities to appear on the same listing without substantial development effort, and a potential negative impact on performance. For now, the resolution is to at least be able to switch between the two listings from within the same window. |
| Due Date                      | With Salado.  |
| Other Management Information. | None.   |
| Superordinates                | None.   |
| Subordinates                  | 8.2.1, 8.2.2, and 8.2.3   |
| Related Storyboards           | 6.1   |

## 8.1.6. List Related Entities from the Matter-Entity DE in TreeView

|                       |  |
|-----------------------|--|
| Goal in Context       | List Related Entities from within an active Entity DE form opened from the Matter Entity Listing using the Related Treeview.   |
| Scope & Level         | Same   |
| Preconditions         | The Entity DE form is active, and was opened from the Matter Entity Listing.   |
| Success End Condition | The Related Tree appears for the selected entity, the Entities branch is expanded, all applicable entity relationships are listed.   |
| Failed End Condition  | The Related Tree appears, but Entities does not contain any values.<br>The Related Tree appears, but Entities does contain a list of related entities, but the list is not correct.<br>The Related Tree appears, but Entities does contain a list of related entities, but matter or site security is not respected. |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.   |
| Secondary Actors      | None.  |
| Trigger               | The user opens an Entity DE form from the Matter-Entity Listing, and then chooses to view related entities for that entity, using the treeview.  |

**STEPS, EXTENSIONS AND SUBVARIATIONS**

1. Highlight an entity on the **Matter Entity Listing**, and open it.
2. Click on the **Related Tree** tab. The tree appears with a plus sign (+) next to **Entities**.
3. Placing focus on the **Entities** branch displays quick filter options on the tree toolbar.
4. Expand the Entities branch.
  - a. The **Related Entities** listing appears, filtered to include **Matter-specific Only** relationships, with **Active Matter Only** checked.
  - b. **Entity-specific Only** is in focus.
5. Proceed as follows:
  - a. Filter the list as needed.
    - i. Display entity relationships for all Entity 1's role assignments, or select a specific role assignment.
    - ii. Use one of the **Relationships to Show** filters:
      - (1) **Entity-specific Only** displays those relationships between two entities that are not matter-specific.
      - (2) **Matter-specific Only** displays those relationships between two entities that are matter-specific.
      - (3) Checking **Active Matter Only** displays just those related entities for the matter from which the **Entity** DE window was opened.
    - iii. Click Filter to carry out filtering on Entity 2 properties.
  - b. Click **Options** to sort and group the list as needed.



c. Click **Options** to modify the grid layout as needed.

### RELATED INFORMATION

|                               |   |
|-------------------------------|---|
| Priority                      | High  |
| Performance                   | All operations should take less than 15 seconds from the time the user requests the action.   |
| Frequency                     | Average   |
| Channels to Actors            | Dialog boxes  |
| Open Issues                   | The current data structure and assignment logic does not allow for both entity-specific and matter-specific entities to appear on the same listing without substantial development effort, and a potential negative impact on performance. For now, the resolution is to at least be able to switch between the two listings from within the same window. |
| Due Date                      | With Salado.  |
| Other Management Information. | None.   |
| Superordinates                | None.   |
| Subordinates                  | 8.2.1, 8.2.2, and 8.2.3   |
| Related Storyboards           | 6.1   |

8.2. Working with Related Entities

8.2.1. Create New Entity Relationship

|                       |  |
|-----------------------|--|
| Goal in Context       | Create a new entity relationship.  |
| Scope & Level         | Same   |
| Preconditions         | A Related Entities listing appears for a selected entity.                      |
| Success End Condition | The relationship is added to the related entities listing.                     |
| Failed End Condition  | The relationship is not added to the related entities listing.                 |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance. |
| Secondary Actors      | None.  |
| Trigger               | The user chooses to create a new entity relationship for a selected entity.    |

**STEPS, EXTENSIONS AND SUBVARIATIONS**

1. On the **Related Entities** listing, click **New** (this is **Add** on the **Related Tree - Entities** branch).
  - a. If **Entity-specific Only** is selected as the filter for the **Related Entities** listing, the **Entity Relationship** DE form that appears is for an entity-specific relationship. The **Entity 1** fields are populated with values from the active entity.
  - b. If **Matter-specific Only** is selected as the filter for the **Related Entities** listing, the **Entity Relationship** DE form that appears is for a matter-specific relationship. The **Entity 1** fields are populated with values from the active entity, and the **Matter** field is populated with the name of the active matter.
2. Choose **Entity 2**.
3. Describe the relationship between the two entities:
  - a. Complete both the **What is Entity 2’s relationship with Entity 1** and **What is Entity 1’s relationship with Entity 2** fields. For example, if Entity 1 is the father and Entity 2 is the daughter, enter “Daughter” in the **What is Entity 2’s relationship with Entity 1** field and “Father” in the **What is Entity 1’s relationship with Entity 2** field.
  - b. If this is an entity-specific relationship and the relationship between the two entities is the same (e.g., “co-worker), complete the **What is Entity 2’s relationship with Entity 1** field and then check **Same**.
4. If this a matter-specific relationship, verify that the matter in the **This relationship is specific for this matter** field is correct, or select a different matter.
5. Click **Save**.
  - a. If an entity-specific relationship already exists for the selected entities, display a message offering the user the opportunity to overwrite the relationship or return to the **Relationship Properties** window and select a new **Entity 2.zzz**
6. and then **Close**.

**RELATED INFORMATION**

|                               |  |
|-------------------------------|--|
| Priority                      | High   |
| Performance                   | All operations should take less than 1 minute from the time the user initiates the action.   |
| Frequency                     | Average  |
| Channels to Actors            | Dialog boxes   |
| Open Issues                   | Many screens that create entity relationships do not respect the reciprocal arrangement for defining the relationship between the entities. They only produce a single relationship definition.<br><br>For the purposes of Salado, we will only populate the <b>What is Entity 2's relationship with Entity 1</b> field with these kinds of relationships. |
| Due Date                      | With Salado.   |
| Other Management Information. | None.  |
| Superordinates                | 8.1.1, 8.1.2, 8.1.3, 8.1.4, 8.1.5, and 8.1.6   |
| Subordinates                  | None   |
| Related Storyboards           | 6.2  |

8.2.2. Open/Edit an Existing Entity Relationship

|                       |   |
|-----------------------|---|
| Goal in Context       | Open/Edit an existing entity relationship.  |
| Scope & Level         | Same  |
| Preconditions         | An Related Entities listing appears for a selected entity.                                    |
| Success End Condition | The relationship is added to the related entities listing.                                    |
| Failed End Condition  | The relationship is not added to the related entities listing.                                |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.                |
| Secondary Actors      | None.   |
| Trigger               | The user chooses to open and/or edit an existing entity relationship for the selected entity. |

**STEPS, EXTENSIONS AND SUBVARIATIONS**

1. On the **Related Entities** listing, highlight the relationship to be opened and/or edited, and click **Open**.
  - a. If **Entity-specific Only** is selected as the filter for the **Related Entities** listing, the **Entity Relationship** DE form that appears is for an entity-specific relationship. The **Entity 1** fields are populated with values from the active entity.

b. If **Matter-specific Only** is selected as the filter for the **Related Entities** listing, the **Entity Relationship** DE form that appears is for a matter-specific relationship. The **Entity 1** fields are populated with values from the active entity, and the **Matter** field is populated with the name of the active matter.

2. Modify the fields as needed.
3. When finished, click **Save**, and then **Close**.

**RELATED INFORMATION**

|                               |  |
|-------------------------------|--|
| Priority                      | High   |
| Performance                   | All operations should take less than 1 minute from the time the user initiates the action.   |
| Frequency                     | Average  |
| Channels to Actors            | Dialog boxes   |
| Open Issues                   | Many screens that create entity relationships do not respect the reciprocal arrangement for defining the relationship between the entities. They only produce a single relationship definition.<br><br>For the purposes of Salado, we will only populate the <b>What is Entity 2's relationship with Entity 1</b> field with these kinds of relationships. |
| Due Date                      | With Salado.   |
| Other Management Information. | None.  |
| Superordinates                | 8.1.1, 8.1.2, 8.1.3, 8.1.4, 8.1.5, and 8.1.6   |
| Subordinates                  | None   |
| Related Storyboards           | 6.2  |

8.2.3. Delete an Existing Entity Relationship

|                       |   |
|-----------------------|---|
| Goal in Context       | Delete an existing entity relationship.   |
| Scope & Level         | Same  |
| Preconditions         | A Related Entities listing or the Entity Relationship DE appears for a selected entity. |
| Success End Condition | The relationship is deleted from the related entities listing.                          |
| Failed End Condition  | The relationship is not deleted from the related entities listing.                      |
| Primary Actors        | Novice, Intermediate and Advanced Users<br>Requires proper security clearance.          |
| Secondary Actors      | None.   |

|         |  |
|---------|--|
| Trigger | The user chooses to delete an existing entity relationship from the selected entity. |
|---------|--|

**STEPS, EXTENSIONS AND SUBVARIATIONS**

1. Choose the record to delete:
  - a. On the **Related Entities** listing, highlight the relationship to be deleted, and click **Delete**.
  - b. If the **Entity Relationship DE** for the relationship you want to delete is already open, click **Delete**.
2. A Delete Confirmation message appears.
  - a. Click **Yes** to delete the entity relationship. The relationship is deleted and the Related Entities listing appears.
  - b. Click **No** to delete the entity relationship.
    - i. If **Delete** was clicked on the **Related Entities** listing, that listing appears.
    - ii. If **Delete** was clicked on the **Entity Relationship DE** form, that form appears.

**RELATED INFORMATION**

|                               |   |
|-------------------------------|---|
| Priority                      | High  |
| Performance                   | All operations should take less than 1 minute from the time the user initiates the action.  |
| Frequency                     | Average   |
| Channels to Actors            | Dialog boxes  |
| Open Issues                   | <p>Many screens that create entity relationships do not respect the reciprocal arrangement for defining the relationship between the entities. They only produce a single relationship definition.</p> <p>For the purposes of Salado, we will only populate the <b>What is Entity 2's relationship with Entity 1</b> field with these kinds of relationships.</p> |
| Due Date                      | With Salado.  |
| Other Management Information. | None.   |
| Superordinates                | 8.1.1, 8.1.2, 8.1.3, 8.1.4, 8.1.5, and 8.1.6  |
| Subordinates                  | None  |
| Related Storyboards           | 6.2   |

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