

Andes:Riobamba Functional Design Specification v1.20 Summary

Internet Portal Integration

Created on July 15, 2003
by Thomas A. Foley

Revision No. 2

Last Saved on **July 15, 2003**
By Thomas A. Foley

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Change History

Version No.	Date	Name	Description of Changes
1.00 through 1.09	02/26/2002 through 03/10/2002	TAF	Original mockups, with iterative reviews, updates and edits.
1.10	03/18/2002	TAF	Final Version for Development Review and Development
1.11	03/26/2002	TAF	Added phase indicators to all mockup and use case headings – [Ph1], [Ph2], and [Ph3].
Summary	05/15/2002	TAF	Removed All Sections after #4 in order to create a summary document. Locked all images.

Comments

With version 1.10, the following items were not included:

1. Storyboards – These will be added in a future update of this FDS.
2. Mockups of the web representations of matters, entities, documents profiles, notes, workflow items, and timeslips. These will be added in a future update of this FDS.
3. Mockups of the reports generated by the new Portal Integration-related listins.

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Internet Portal Integration

This FDS needs to be updated with the following additional functionality:

1. *Ability to link reports*
2. *Link of the intake Module*
3. *Link of the matter view*
4. *Use of the authentication service*
5. *Link of the back end profiling object*
6. *Hyperlink support for opening DE screens associated with a record in PMWIN-Portal via an OLE link*
7. *Add Groupware to all forms.*

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:

1. Mockups of the various UI screen components, including controls, menus, pages, forms and dialog boxes
2. Use cases that describe low-level detail of the workflow

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

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

1.2. Definition of Project

The Andes:Riobmamba project is a multi-phased integration of tools that will allow Practice Manager to serve as the source data repository for Web-based portals. The project, itself, consists of three page components:

1. A **Publishing** component, which takes data from Practice Manager and publishes it, thereby make it available for use on portals.
2. A **Management** and **Subscription** component, which is used to define one or more portal and how they will be presented on the Web, as well as what information can be viewed through that portal.
3. A **Settings** component, which is used to define general portal parameters, as well as supporting elements for portals, such as footers, headers, images, styles, supporting pages, and themes.

1.3. Phasing of Project

Because the Andes:Riobamba project is so large, it is necessary to phase in the various elements, with emphasis being on the “need-to-haves,” followed by the “nice-to-haves.” A general breakdown is as follows:

1.3.1. Phase 1 Portal Integration Development

1.3.1.1. General Scope

1. Portal Management (includes subscription)
 - a. Base forms
 - b. All custom settings (no lookups for footers, headers, images, styles, supporting pages, and themes)
 - c. Support for inheritance of presentation from parent.
2. Portal Publishing
 - a. Base forms
 - b. All custom settings (no lookups for images)
3. Portal Settings
 - a. General Properties Only

1.3.1.2. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Management

1.3.1.3. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Publishing

1.3.1.4. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Settings

1.3.1.5. Detailed Scope – Forms, Listings and Dialog Boxes – Portal General

1.3.1.6. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Presentation

1.3.1.7. Detailed Scope – Use Cases

1.3.2. Phase 2 Portal Integration Development

1.3.2.1. General Scope

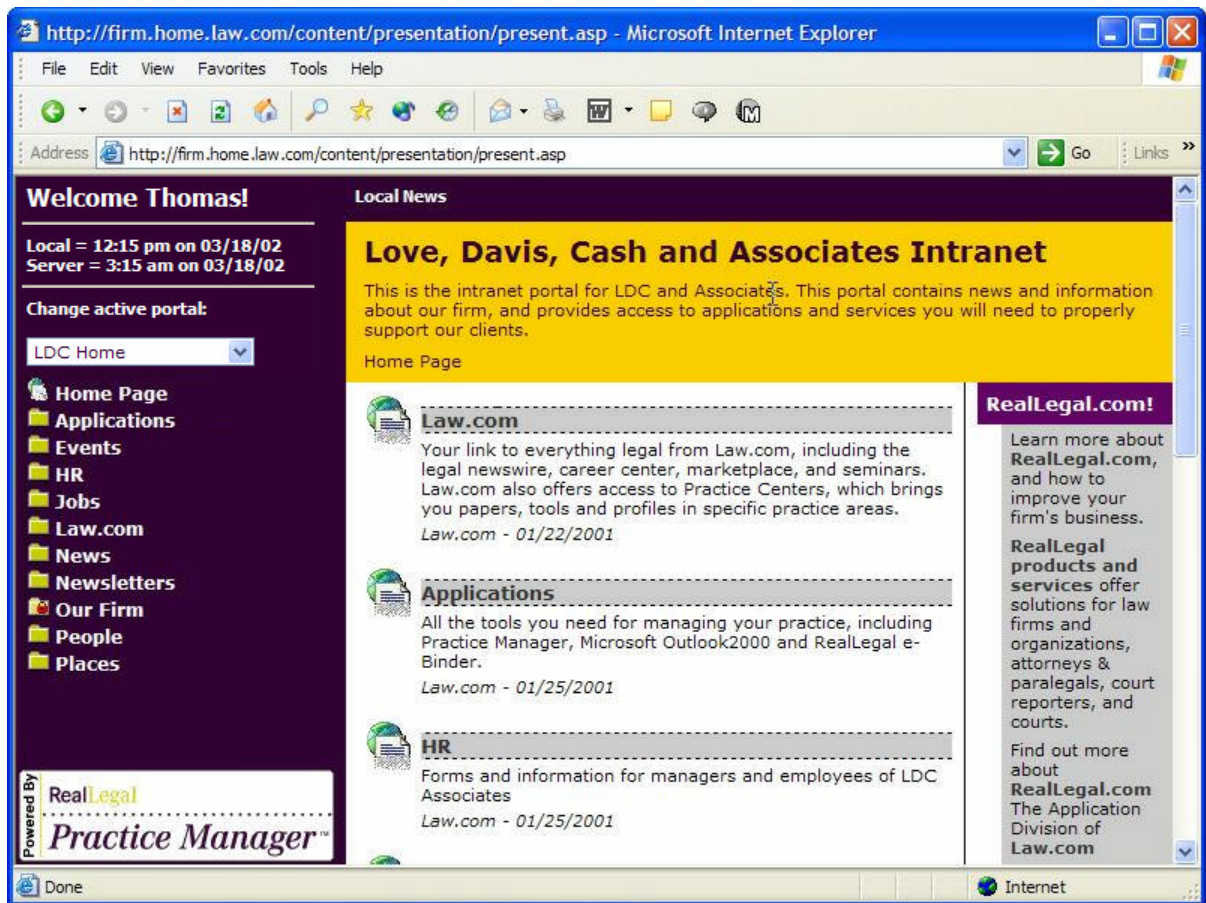
1. Portal Settings
 - a. Addition of footers, headers, images, styles, supporting pages, and themes
2. Portal Management
 - a. Addition of lookups for footers, headers, images, styles, supporting pages, and themes
 - b. Expansion of presentation inheritance to support themes and like selections

- 3. Portal Publishing
 - a. Addition of lookups for images
- 1.3.2.2. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Settings
- 1.3.2.3. Detailed Scope – Use Cases
- 1.3.3. Phase 3 Portal Integration Development
 - 1.3.3.1. General Scope
 - 1. Portal Settings
 - a. Add listings to assignment windows
 - b. Add filters to applicable listings
 - c. Add reporting
 - 2. Portal Management
 - a. Add listings to assignment windows
 - b. Add filters to applicable listings
 - c. Add reporting
 - 3. Portal Publishing
 - a. No changes.
 - 1.3.3.2. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Management
 - 1.3.3.3. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Settings
 - 1.3.3.4. Detailed Scope – Use Cases
- 1.4. Scope of Document

This document is complete in its scope for Portal Integration. It is written to serve as the complete specification. Where applicable, phasing notes have been added to storyboards, mockups, and use cases.

2. Design Assumptions

2.1. What is a portal?



By definition for this specification, a portal is a Web presentation of selected data from Practice Manager, that is organized into logical Web sites – or portals.

Any matter, entity, document, note, workflow or timeslip information in Practice Manager can be presented on a Web portal.

From a data structure and functionality standpoint, a portal is nothing more than a special type of matter that has additional functionality and data associated with it. All portal-specific date and functionality for a portal resides within the General tab of a portal matter. All other matter tabs, including Entities, Documents, Notes, Groupware, Workflow, Issues, Timeslips and Security, function just as they would in a regular matter. In fact, it is this functionality that allows items to be created specifically for a portal.

A firm can have many portals. What distinguishes a portal matter from any other matter is that the site for which the portal is created is of a specific user-defined site type. That site type tells the portal presentation engine which matters are portals, and which ones are not. Only matters created for sites of that site type can be portals.

2.2. What is a **publication**?

A publication can be either of the following:

1. A Practice Manager data record which has been expressly designated as being available for presentation on one or more portals.

In order for a Practice Manager data record to be presented on the portal, the **Creator** or last **Revisor** of the data record must first publish it.

2. A Web-link to an external file that is not a Practice Manager data record, such as a Web site, page or application.

There are two primary steps to publishing a data record:

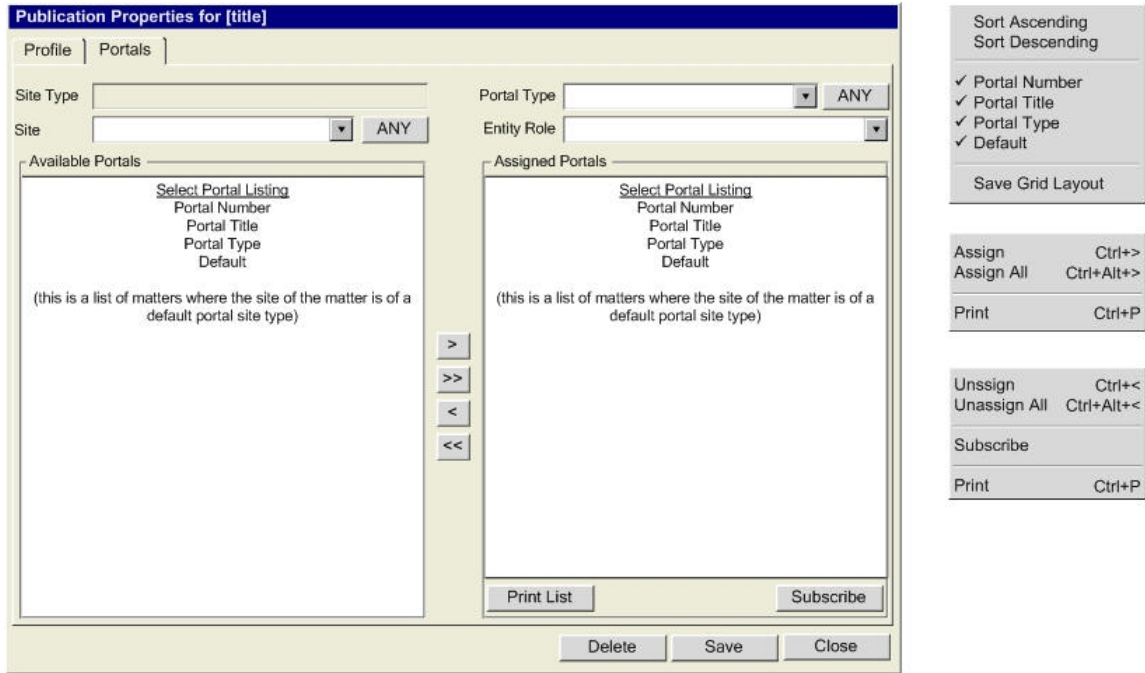
3. Creating a publication record for the item.

This publication record provides data fields for defining a publication title, summary, representative image – logo and icon, and an availability date range for the publication.

Each data record has only one publication record.

There are options within the Portal Integration for linking the publication dat directly to the source data record for ease of maintenance and updating.

4. Assigning the publication to one or more portals.



Only those portals to which the item is assigned can present the publication.

To simplify publishing, there are options within the Portal Integration for auto-publishing items as they are assigned to a portal using default publishing rules.

Future Considerations

Web-links could be extended to allow for publications from an external database to be added into the firm’s Practice Manager. This would allow for auto-publishing of content.

Likewise,

This could be a strong marketing point, and the Web site would also show our “dedication” to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

We could add an import utility that allows the user to go to a Web site (portal?), click on a link, download a file, run that file, and have it automatically create new Web-link publications for use in the Portal Integration.

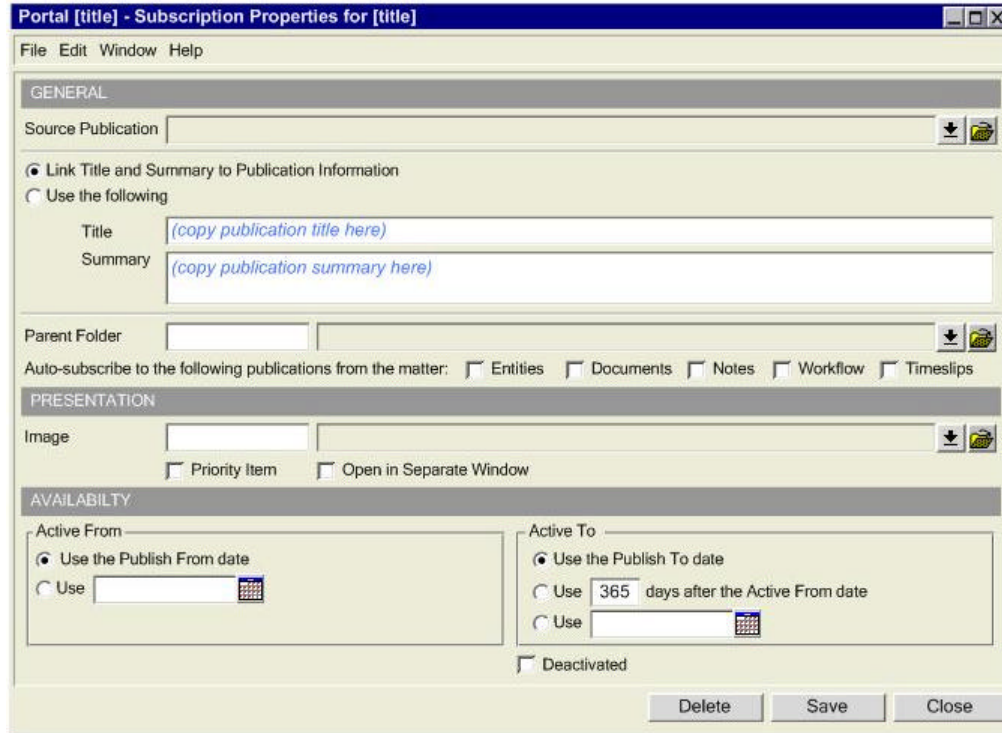
This could be a strong marketing point, and the Web site would also show our “dedication” to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

2.3. What is a **subscription**?

Just because a data record or Web-link has been published to a portal, it does not mean it will appear on the portal.

In order to appear on a portal, a publication must be subscribed to. The subscription process consists of two steps:

1. Creating a subscription record for the item.



This subscription record provides data fields for defining a title, summary, representative image – logo and icon, and an availability date range for the subscription.

A subscription can also be designated as a priority item, give the user the option of displaying it in a special section on the home or folder summary page.

There are options within the Portal Integration for linking the subscription data directly to the publication data for ease of maintenance and updating.

2. Assigning the subscription to a folder – or menu – on the portal.

To simplify subscribing, there are options within the Portal Integration for auto-subscribing items as they are assigned to a portal using default publishing rules.

2.4. What is a **folder**?

A folder is a placeholder for subscriptions.

In the portal presentation, there are two representations for a folder:

1. As nodes on an expandible/collapsible menu.
2. As entries on the home page and folder summary pages.

Each folder has a corresponding summary page which lists the subfolders and subscriptions contained within that folder.

Creating a folder is a three-step process.

1. Creating a folder **Profile**.

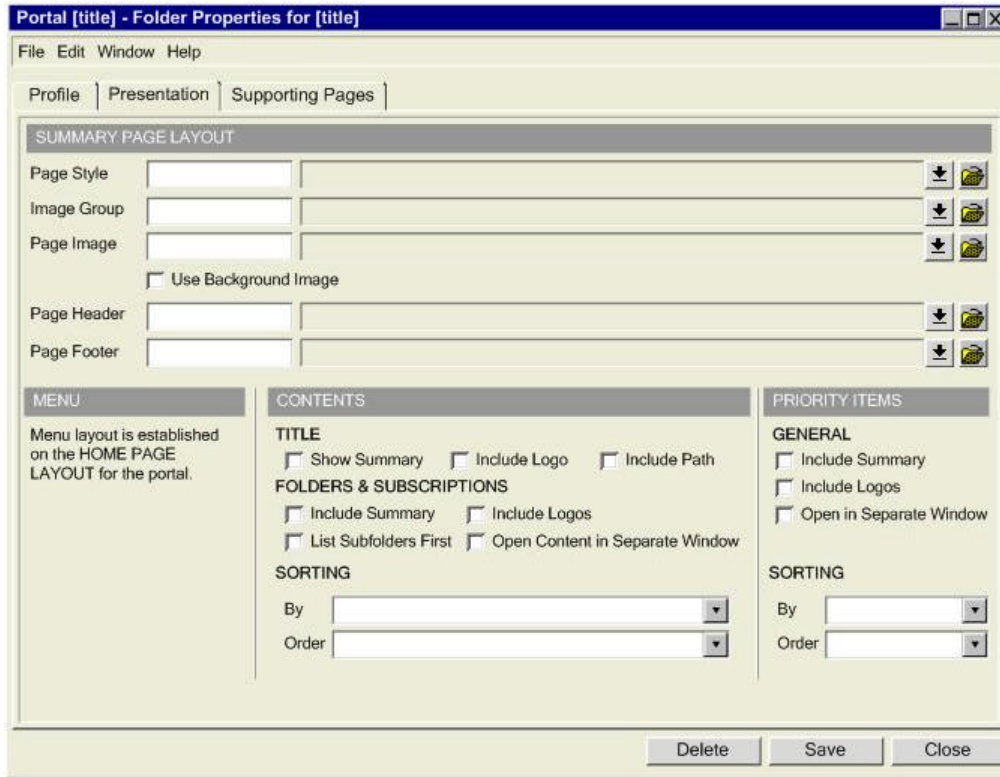
The screenshot shows a 'Folder Properties' dialog box with the following sections:

- GENERAL**: Title, Summary, Parent Folder (dropdown with icons), Folder Label.
- SUMMARY PAGE PRESENTATION OPTIONS**:
 - Use the home page settings
 - Use the parent folder settings
 - Use theme [dropdown]
 - Use custom settings - Copy Settings from existing [dropdown] [text field]
- AVAILABILITY**: Active From [calendar icon] To [calendar icon] Deactivated

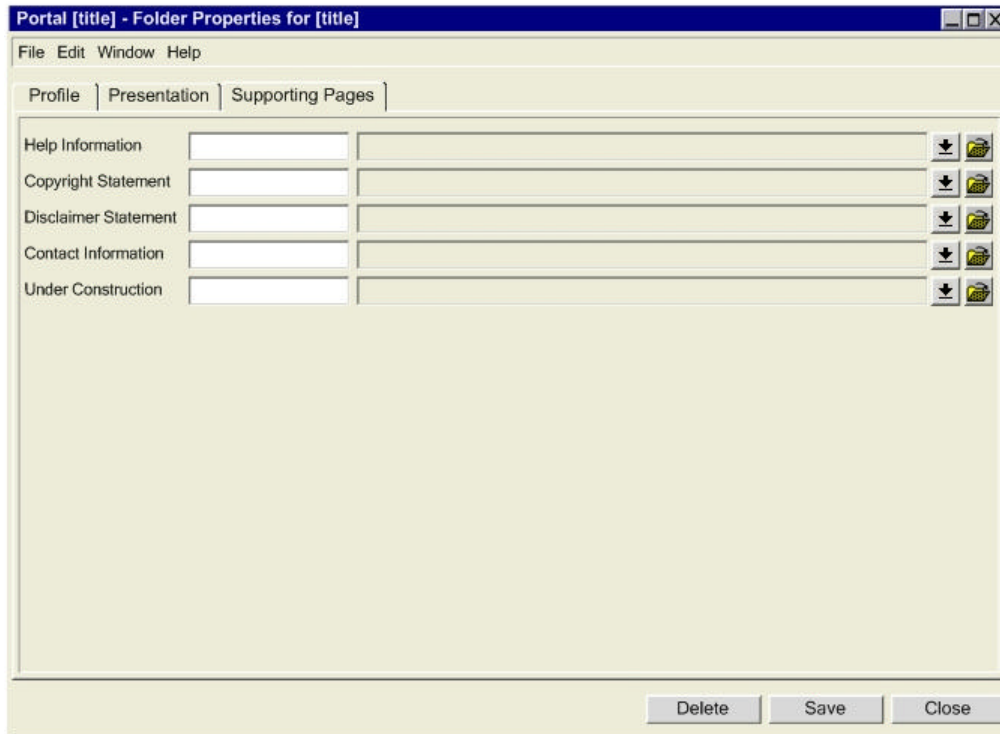
Buttons at the bottom: Delete, Save, Close.

Each folder record provides data fields for defining a title, label, summary, representative image – logo and icon, and an availability date range for the folder.

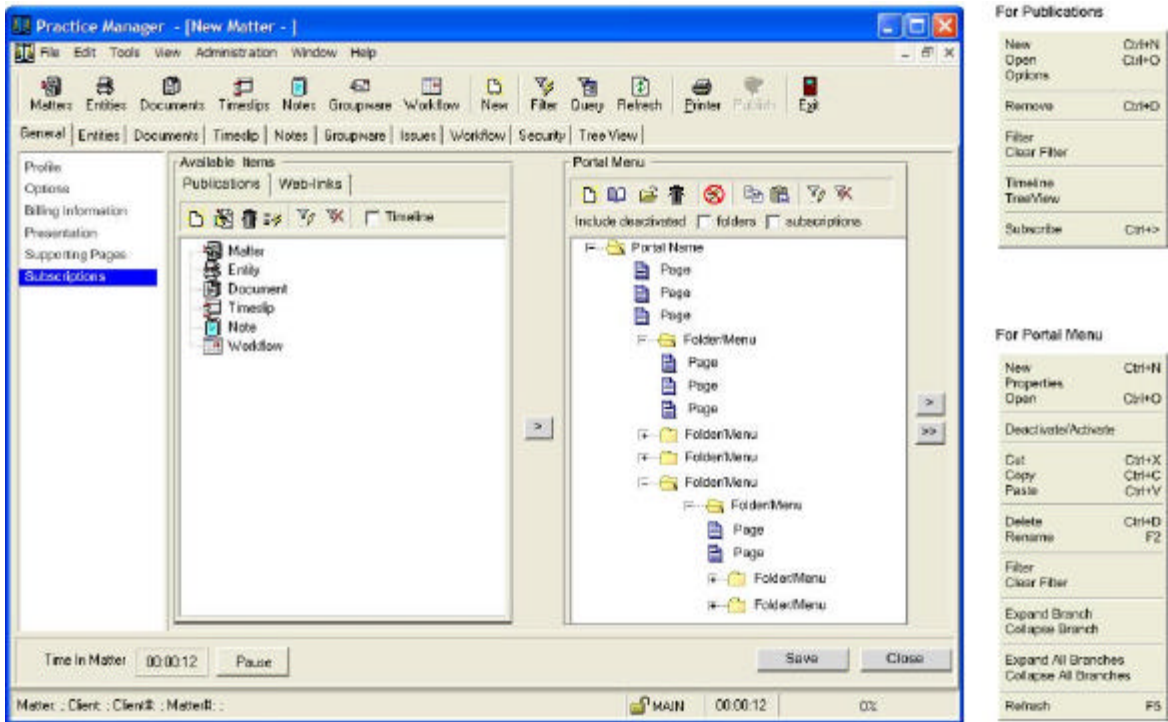
2. Defining **Presentation** options for the folder summary page.



3. Selecting **Summary Pages** for the folder summary page.



To simplify working with folders for a site, the representation in the Portal Integration is that of a tree, much like the Windows Explorer folder tree. The tree supports copying and moving of folders through both DE forms and drag'n'drop.



Entire folder structures can be copied from one parent folder to another, including the subscriptions within that folder (optional). In the future, the option of copy an entire folder and subscription branch from one portal to another will be added.

2.5. Configuring Practice Manager to allow Portal Presentation of Data

Once the Portal Integration software has been installed and a Web server configured for the organization, **General Defaults** must be defined in **Portal Settings**:

1. What site type will be used for sites that will store portal matters?

This is what will tell the Portal Presentation Engine which matters should be presented as portals.

It is highly recommended that a specific Site Type is defined, and at least one Site is created with that Site Type.

Using the default Practice Manager Site Type for portals is not recommended, as it could result in data being presented that should not be presented. There is no limitation, however, on this. If a firm wants to use their default Practice Manager Site Type for portals, they can.

2. When is the base domain name of the portal?

This is the URL the user will enter to access the portal **Log In** page.

3. Which portal will serve as the default portal?

This is the portal that will open when the user logs in. If the user does not have permission to access the default portal, they cannot access any other portals, even if they do have permission.

It is recommended that one, simple, firm-wide portal first be created and all users assigned to it. The portal should be “thin” on content and structure so that it will load quickly across slower Internet connections. Once loaded, the user can switch to other portals to access more specific content, such as matter portals, department portals, office portals, client portals, etc.

Additional settings can be established that make creating portals, menus, subscriptions, and publications much easier:

1. Defaults can be defined for matters, entities, documents, notes, workflow items, and timeslips, making the publication and subscription to these items much faster.
2. **Styles** can be defined which include stylesheet code for controlling the appearance of the portal, including the colors, fonts, and positioning of Web page objects. By simply selecting a different style for the portal or a folder, the resulting page on the portal will instantly be refreshed.

Future Considerations

The currently interface for styles is basically to present a text box which can contain the appropriate style code for the portal or folder.

Now, it is anticipated that most of our users will not know how to manipulate stylesheet code in order to produce the appropriate effects on their portals.

The solution to this would be to provide a Web site (a portal?) that contains stylesheet code, organized in logical schemes, that the user could simply copy and paste from the site, and then manipulate as needed (or not). If they mess up the code, they can just copy and paste it again.

Likewise, Portal Integration should ship with generic default values for each stylesheet object.

We could add an import utility that allows the user to go to the Web site, click on a link, download a file, run that file, and have it automatically create new styles for use in the Portal Integration.

This could be a strong marketing point, and the Web site would also show our “dedication” to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

3. **Headers** can be defined which include text and code that, when rendered, produces the header for a page. Headers can include text, nested apps for marguis, banners, or any other HTML-compliant code. Each summary page on a portal, including the home page, can have its own header, or can inherit from the portal or parent folder summary page.

Future Considerations

The currently interface for header is basically to present a text box which can contain the appropriate HTML code.

Now, it is anticipated that most of our users will not know how to manipulate HTML code in order to produce the headers they want to use on the portal.

The solution to this would be to provide a Web site (a portal?) that contains header code text, organized in logical schemes, that the user could simply copy and paste from the site, and then manipulate as needed (or not). If they mess up the code, they can just copy and paste it again.

Likewise, Portal Integration should ship with generic default values for the header.

We could add an import utility that allows the user to go to the Web site, click on a link, download a file, run that file, and have it automatically create new headers for use in the Portal Integration.

This could be a strong marketing point, and the Web site would also show our “dedication” to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

4. **Footers** can be defined which include text and code that, when rendered, produces the footer for a page. Footers can include text, nested apps for marguis, banners, or any other HTML-compliant code. Each summary page on a portal, including the home page, can have its own footer, or can inherit from the portal or parent folder summary page.

Future Considerations

The currently interface for footer is basically to present a text box which can contain the appropriate HTML code.

Now, it is anticipated that most of our users will not know how to manipulate HTML code in order to produce the footers they want to use on the portal.

The solution to this would be to provide a Web site (a portal?) that contains footer code text, organized in logical schemes, that the user could simply copy and paste from the site, and then manipulate as needed (or not). If they mess up the code, they can just copy and paste it again.

Likewise, Portal Integration should ship with generic default values for the footer.

We could add an import utility that allows the user to go to the Web site, click on a link, download a file, run that file, and have it automatically create new footers for use in the Portal Integration.

This could be a strong marketing point, and the Web site would also show our “dedication” to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

- 5. **Images** can be defined for use in representing objects on portals. Each image consists of an icon-version (used for the menu), small-, medium- and large-logo versions (used in some presentation conditions), a background version (a watermark or a background on which the image looks good).

Images can be collected into **Image Groups** that are of like design and style. This helps ensure consistency across the portal.

Future Considerations
We could add an import utility that allows the user to go to the Web site, click on a link, download a file, run that file, and have it automatically create new image groups, with supporting images, in the Portal Integration.
This could be a strong marketing point, and the Web site would also show our “dedication” to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

- 6. **Supporting Pages** can be defined for use on portals.

There are currently five types of supporting pages defined – Help Information, Contact Information, Copyright Statement, Disclaimer Statement, and Under Construction.

Each summary page on the portal, including the home page, can have its own set of supporting pages that are accessible through links on the header or footer. There are also options to use the same supporting page on each portal page. For example, the portal administrator may want each summary page to use the same Contact Information, Copyright Statement, Disclaimer Statement, and Under Construction supporting pages, but want each Help Information page to be unique.

Supporting pages can be files or links to other Web pages created outside of the portal, such as a custom **Request for Information** page.

- 7. **Themes** can be defined for use on portals.

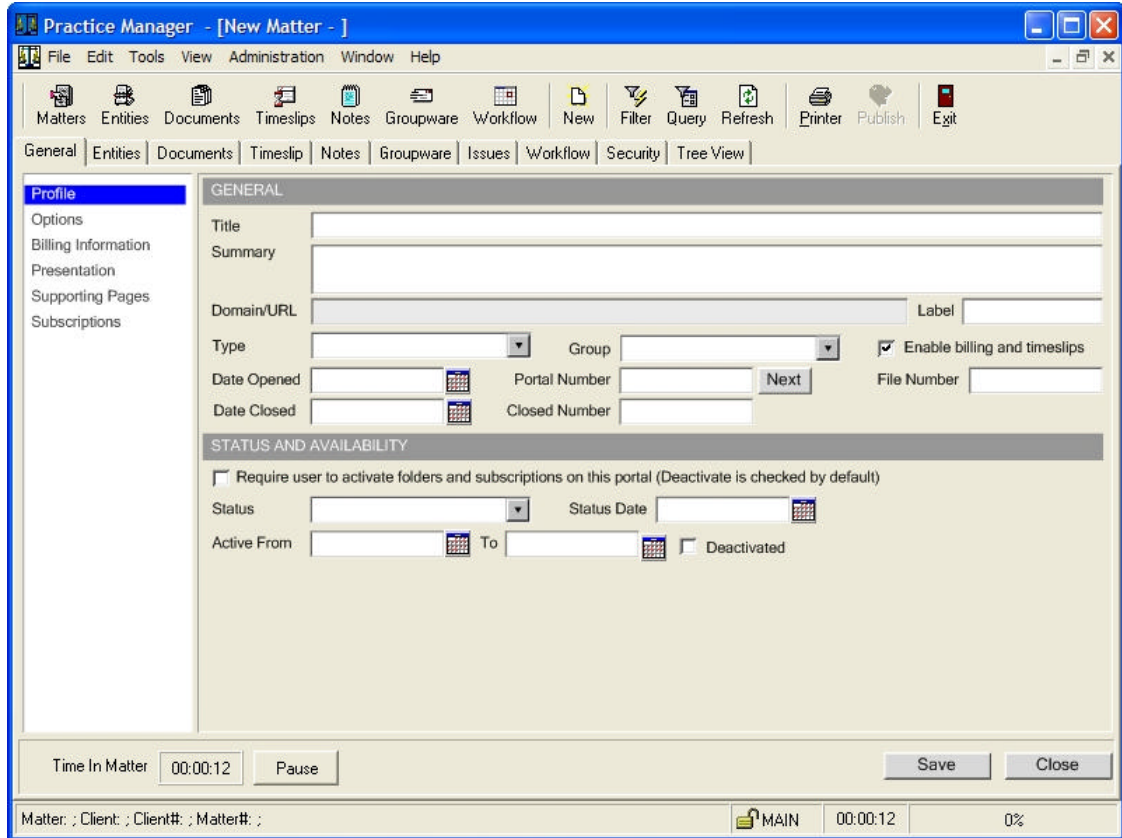
In a sense, a theme is no more than a template populating the presentation option fields for the portal home page or folder summary page. Each theme consists of a style, header, footer, image group, default image, and options for presenting the menu, contents (folders and subscriptions) and priority items (subscriptions marked as being Priority Items).

Future Considerations
We could add an import utility that allows the user to go to the Web site, click on a link, download a file, run that file, and have it automatically create new themes, complete with supporting images, styles, headers, and footers for use in the Portal Integration.
This could be a strong marketing point, and the Web site would also show our “dedication” to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

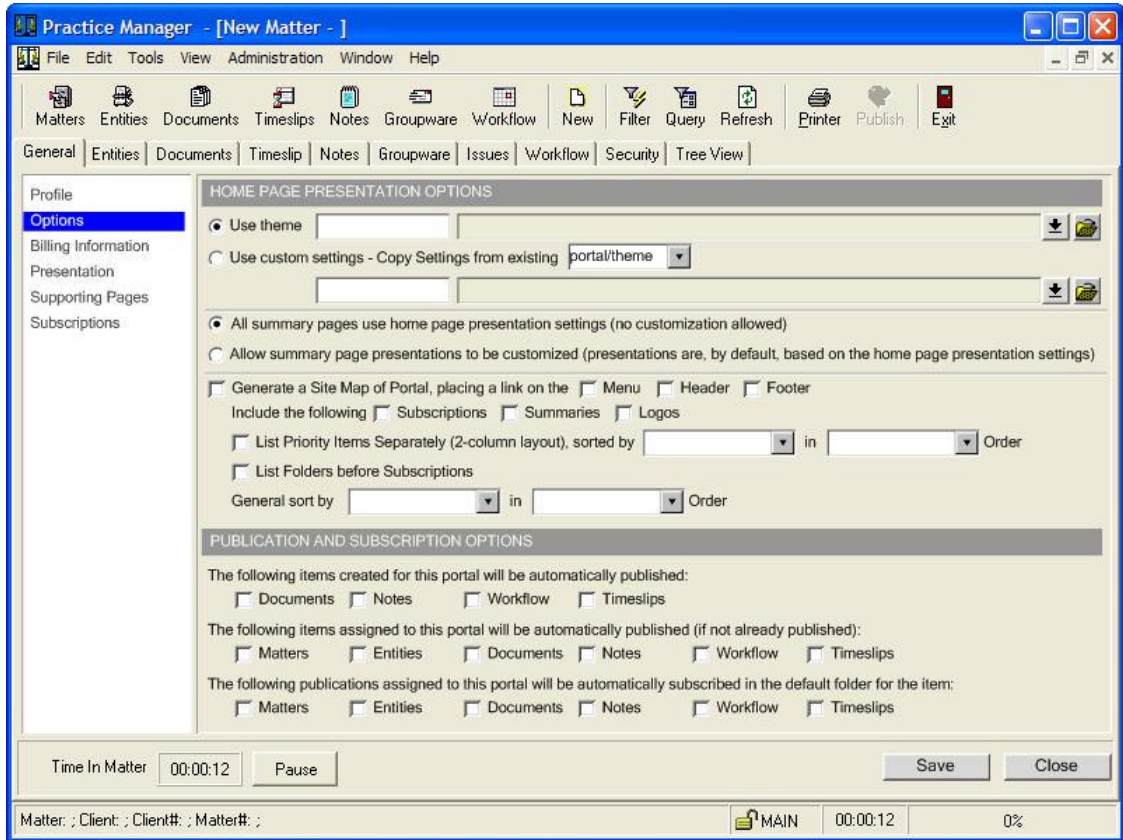
2.6. Creating Portals

There are 5 major steps to creating a portal:

1. Log in to a **Site** where the **Site Type** is of the default portal site type.
2. Create a new portal matter, and defining a **Profile** for that portal, including the **Title** and **Summary** to be used on the portal home page.

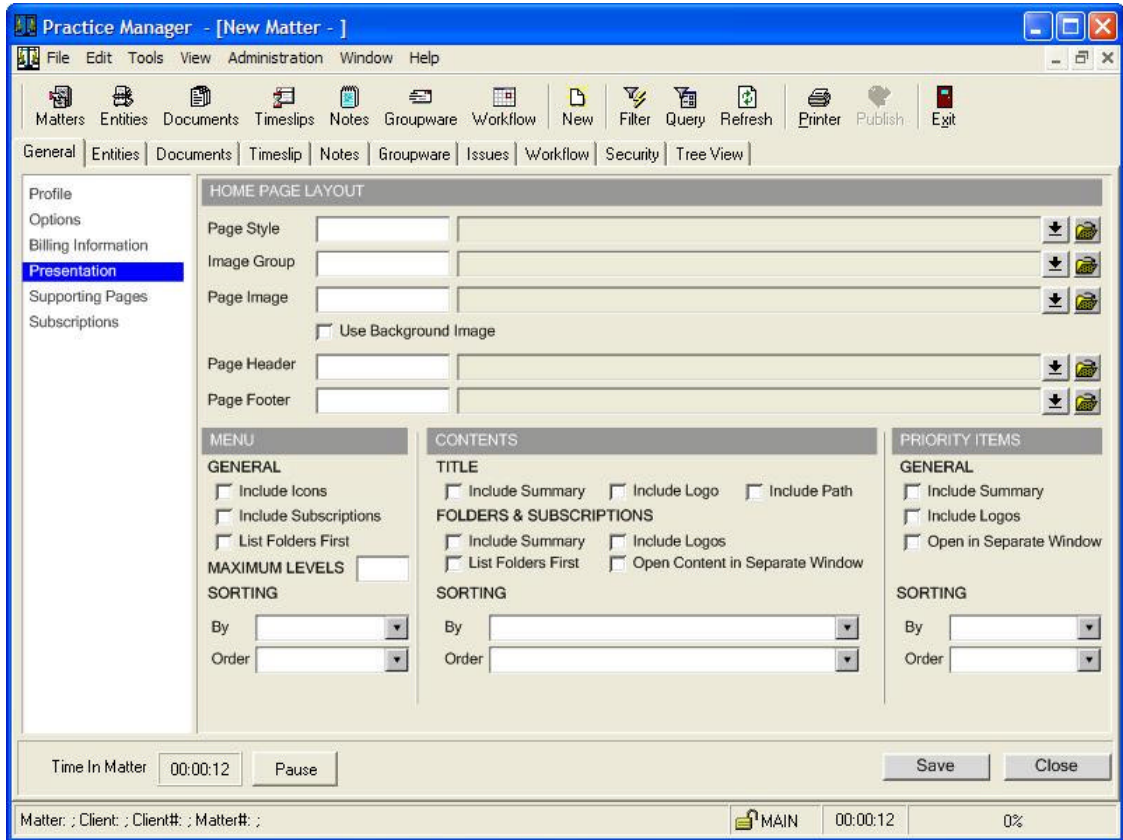


3. Define **Options** for the portal, including the following:

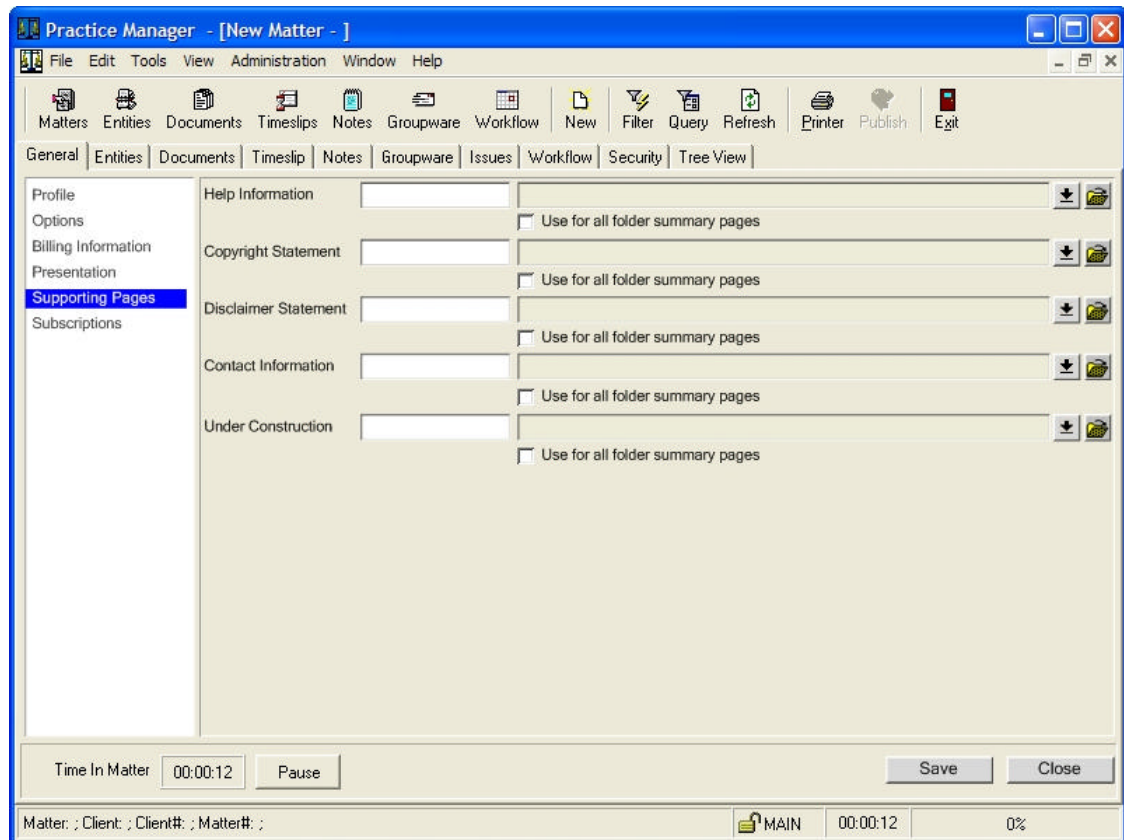


- a. Whether to use a theme the presentation, or copy the settings from an existing portal or theme
- b. Whether to allow a summary pages within the portal to look the same as the home page, or use custom settings.
- c. When to generate a site map, which can be accessed from a link on the menu, header or footer.
- d. Set options for automatically publishing and subscribing to items on the portal.

4. Define the home page **Presentation** options.



5. Select **Supporting Pages** for the home page and folder summary pages.



Once the portal has been created, publications can be assigned to the portal, folders can be created for the menu, and subscriptions can be placed inside the folders.

2.7. Portal Presentation

Presenting a portal uses a complex set of data-driven rules for determining who the portal appears. The only part of the presentation that is “hard-coded” is the underlying framework. All other aspects of the portal, including how items appear on the portal and where, is determined by options set in the portal matter.

3. Practice Manager-specific Issues

3.1. Implementation and Respect for GMT Date/Time Standards

The current Practice Manager database and client currently do not use or respect the use of GMT.

Because the portal can be accessed from multiple time zones, it is critical that the times be converted from local server time to local client time. This requires an update to how Practice Manager stores dates. This work is beyond the scope of this FDS.

Once GMT has been added to Practice Manager, the Portal Presentation should convert all stored in the database from local server time to local client time. This work must be included as part of this FDS.

3.2. Implementation of Related Matters for Workflow and Timeslips

Currently, workflow items and timeslips do not support the Related Matters functionality found in matters, entities, documents and notes.

Portal Integration requires that items created for a non-portal matter that need to be published to a portal, must be related to that portal matter. This cannot be accomplished with the current Practice Manager data structure, and therefore requires an update of that data structure. This is work beyond the scope of this FDS, but should be addressed in the release of Practice Manager corresponding to the release of the Portal Integration.

No changes in the workflow or timeslip UI are required at this time. The **Portals** tab of the **Portal Publications** DE form handles the assignment of all items – including workflow and timeslips – to portal matters from the source matter.

The **Matter Tree View**, however, needs to be updated to respect Related Matters for workflow items and timeslips, just as it does for documents and notes. This is work beyond the scope of this FDS, but should be addressed in the release of Practice Manager corresponding to the release of the Portal Integration.

3.3. Menu Items and Buttons for Integrations

There are several locations throughout this FDS where menu and buttons items for the Portal Integration are added to core Practice Manager menus and forms. It is understood that a new menu engine will be added to Practice Manager prior to the release of the Portal Integration, thereby allowing the Portal Integration to add these menu items and buttons with requiring a change in Practice Manager.

3.4. Functional Security Operations for Integrations

There are several new Functional Security Operations that need to be added for the Portal Integration. It is understood that a new “method” will be added to Practice Manager prior to the release of the Portal Integration, thereby allowing the Portal Integration to add these new Functional Security Operations with requiring a change in Practice Manager.

4. Security Considerations

4.1. Functional Security

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 Andes:Riobamba Functional Design Specification v1.11 Summary (these should also be included to the central Security FDS):

1. All matter-related security functions.
2. All entity-related security functions.
3. All document-related security functions.
4. All note-related security functions.
5. All workflow-related security functions.
6. All timeslip-related security functions.

NEW – This list contains new functional security operations that need to be added as a result of the functionality defined in this FDS for Andes:Riobamba Functional Design Specification v1.11 Summary (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?
Activate Portals	The user can change the value in the Deactivated field for a portal from checked to not checked.	The user cannot change the value in the Deactivated field for a portal from checked to not checked.		
Administer Portal Settings	The user can administer Portal Settings . On Select windows for styles, headers, footers, themes, images, image groups, and supporting pages, the New , Open and Copy buttons are enabled. On Style , Header , Footer , Theme , Image , Image Group , and Supporting Page fields, the Open button is enabled.	The user cannot administer Portal Settings . On Select windows for styles, headers, footers, themes, images, image groups, and supporting pages, the New , Open and Copy buttons are disabled. On Style , Header , Footer , Theme , Image , Image Group , and Supporting Page fields, the Open button is disabled.		
Publish Item	The user can publish an existing Practice Manager data objects, defining publication record and assigning the publication to one or more portals.	The user cannot publish an existing Practice Manager data objects.		

4.2. Site Security

If Site Security is enabled, the following areas within the Portal Integration must respect Site Security:

1. Portal Matter – General tab – Billing Information page – Client/Billablefield (from core Practice Manager)
2. Portal Matter – General tab – Billing Information page – Default Billing Matter field
3. Portal Matter – General tab – Billing Information page – Fee Schedule table (from core Practice Manager)
4. Portal Matter – General – Subscriptions – Available Items – Publications listing

Only publications where the source is from a site in which the user is included should be included on the listing.

5. Portal Matter – General – Subscriptions – Available Items – Portal Menu listing

Only subscriptions where the publication source is from a site in which the user is included should be included on the listing.

6. Subscription Properties – Publication Source field

Only publications where the source is from a site in which the user is included should be included on the listing.

7. Publication Properties – Profile – Source field

Only sources from sites in which the user is included should be accessible through this field.

8. Publication Properties – Portals (assignment)

Only portals from sites in which the user is included should be accessible through this assignment form.

9. Publication Properties – Assignment Listing

Only publications where the source is from a site in which the user is included should be included on the listing.

10. Select Publications listing

Only publications where the source is from a site in which the user is included should be included on the listing.

11. Select Source for Publication listing

Only sources from sites in which the user is included should be accessible through this field.

12. Portal Settings – General – Default Portal field

Only portals from sites in which the user is included should be accessible through this field.

13. Portal Settings – Publications

Only publications where the source is from a site in which the user is included should be included on the listing.

14. Portal Settings – Publications – Filter – Portal field

Only portals from sites in which the user is included should be accessible through this field.

15. Portal Settings – Publications – Filter – Select Portals for Filter

Only portals from sites in which the user is included should be accessible through this assignment form.

16. Portal Settings – Publications – Filter – Select Publications for Filter

Only publications where the source is from a site in which the user is included should be accessible through this assignment form.

17. Portal Presentation – Menu

Only subscriptions where the publication source is from a site in which the user is included should be included on the menu.

18. Portal Presentation – Content

Only subscriptions where the publication source is from a site in which the user is included should be included on the home page or folder summary page.

19. Portal Presentation – Priority Items

Only subscriptions where the publication source is from a site in which the user is included should be included on the home page or folder summary page.

4.3. Matter Security

If Matter Security is enabled, the following areas within the Portal Integration must respect Matter Security:

1. Portal Matter – General tab – Billing Information page – Default Billing Matter field

2. Portal Matter – General – Subscriptions – Available Items – Publications listing

Only publications where the source is from a matter in which the user is included should be included on the listing.

This does not include entities, as they are not matter-specific.

3. Portal Matter – General – Subscriptions – Available Items – Portal Menu listing

Only subscriptions where the publication source is from a matter in which the user is included should be included on the listing.

This does not include entities, as they are not matter-specific.

4. Subscription Properties – Publication Source field

Only publications where the source is from a matter in which the user is included should be included on the listing.

This does not include entities, as they are not matter-specific.

5. Publication Properties – Profile – Source field

Only sources from matters in which the user is included should be accessible through this field.

This does not include entities, as they are not matter-specific.

6. Publication Properties – Portals (assignment)

Only portals from matters in which the user is included should be accessible through this assignment form.

7. Publication Properties – Assignment Listing

Only publications where the source is from a matter in which the user is included should be included on the listing.

This does not include entities, as they are not matter-specific.

8. Select Publications listing

Only publications where the source is from a matter in which the user is included should be included on the listing.

This does not include entities, as they are not matter-specific.

9. Select Source for Publication listing

Only sources from matters in which the user is included should be accessible through this field.

This does not include entities, as they are not matter-specific.

10. Portal Settings – General – Default Portal field

Only portals from matters in which the user is included should be accessible through this field.

11. Portal Settings – Publications

Only publications where the source is from a matter in which the user is included should be included on the listing.

This does not include entities, as they are not matter-specific.

12. Portal Settings – Publications – Filter – Portal field

Only portals from matters in which the user is included should be accessible through this field.

13. Portal Settings – Publications – Filter – Select Portals for Filter

Only portals from matters in which the user is included should be accessible through this assignment form.

14. Portal Settings – Publications – Filter – Select Publications for Filter

Only publications where the source is from a matter in which the user is included should be accessible through this assignment form.

This does not include entities, as they are not matter-specific.

15. Portal Presentation – Menu

Only subscriptions where the publication source is from a matter in which the user is included should be included on the menu.

This does not include entities, as they are not matter-specific.

16. Portal Presentation – Content

Only subscriptions where the publication source is from a matter in which the user is included should be included on the home page or folder summary page.

This does not include entities, as they are not matter-specific.

17. Portal Presentation – Priority Items

Only subscriptions where the publication source is from a matter in which the user is included should be included on the home page or folder summary page.

This does not include entities, as they are not matter-specific.

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