Andes:Riobamba Functional Design Specification v1.20

Internet Portal Integration

Created on March 19, 2002 by Thomas A. Foley

Revision No. 48

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

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Andes:Riobamba Functional Design Specification v1.11 • Internet Portal Integration

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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 9.8 Portal Settings – General – Weblinks (tab properties only).
			Added phase indicators to all mockup and use case headings – [Ph1], [Ph2], and [Ph3].

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, itsef, 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.

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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. 5.1 Intake Wizard Portal Intake (Page 44)
 - 2. 5.2 Portal Management General Profile (Page 46)
 - 3. 5.3 Portal Management General Options (Page 51)
 - 4. 5.5 Portal Management General Presentation (Page 66)
 - 5. 5.6 Portal Management General Supporting Pages (Page 74)
 - 6. 5.7 Portal Management General Subscriptions (Page 80)
 - 7. 5.8 Portal Management General Subscriptions Portal Menu Filter (Page 88)
 - 8. 5.9 Portal Management General Subscriptions Warning Publication Not Active (Page 92)
 - 9. 5.10 Portal Management Folder Properties Profile (Page 93)
 - 10. 5.11 Portal Management Folder Properties Presentation (Page 99)
 - 11. 5.12 Portal Management Folder Properties Supporting Pages (Page 106)
 - 12. 5.13 Portal Management Folder Properties Unsaved Changes Exist (Page 110)

- 13. 5.14 Portal Management Folder Properties Label Not Unique (Page 111)
- 14. 5.15 Portal Management Folder Properties **No** Activation Date Entered (Page 113)
- 15. 5.16 Portal Management Folder Properties Deactivate Confirmation (Page 114)
- 16. 5.17 Portal Management Folder Properties Paste What (Page 116)
- 17. 5.18 Portal Management Folder Properties Delete Confirmation (Page 118)
- 18. 5.19 Portal Management Subscription Properties Web-link (Page 119)
- 19. 5.20 Portal Management Subscription Properties Matter (Page 127)
- 20. 5.21 Portal Management Subscription Properties Entity (Page 138)
- 21. 5.22 Portal Management Subscription Properties Document (Page 147)
- 22. 5.23 Portal Management Subscription Properties Note (Page 156)
- 23. 5.24 Portal Management Subscription Properties Workflow (Page 165)
- 24. 5.25 Portal Management Subscription Properties Timeslip (Page 171)
- 25. 5.26 Portal Management Subscription Properties Unsaved Changes Exist (Page 180)
- 26. 5.27 Portal Management Subscription Properties **No** Activation Date Entered (Page 181)
- 27. 5.28 Portal Management Subscription Properties Warning From Dates Mismatch (Page 182)
- 28. 5.29 Portal Management Subscription Properties Warning To Dates Mismatch (Page 183)
- 29. 5.30 Portal Management Subscription Properties Delete Confirmation (Page 184)
- 30. 5.31 Portal Management Subscription Properties Auto-subscription Confirmation (Page 185)
- 1.3.1.3. Detailed Scope Forms, Listings and Dialog Boxes Portal Publishing
 - 1. 7.1 Publication Properties New (Page 226)
 - 2. 7.2 Publication Properties Profile Weblink (Page 228)
 - 3. 7.3 Publication Properties Profile Matter (Page 232)

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- 7.4 Publication Properties Profile Entity (Page 241)
- 7.5 Publication Properties Profile Document (Page 249)
- 7.6 Publication Properties Profile Note (Page 256)
- 7.7 Publication Properties Profile Workflow (Page 263)
- 7.8 Publication Properties Profile Timeslip (Page 271)
- 9. 7.9 Publication Properties Portals (Page 278)
- 10. 7.10 Publication Properties Unsaved Changes Exist (Page 282)
- 11. 7.11 Publication Properties **No** Publication Date Entered (Page 283)
- 12. 7.12 Publication Properties Deactivate Confirmation (Page 284)
- 13. 7.13 Publication Properties Delete Confirmation (Page 286)
- 1.3.1.4. Detailed Scope – Forms, Listings and Dialog Boxes – Portal Settings
 - 9.1 Portal Settings General (Page 306)
 - 2. 9.2 Portal Settings General Matters (tab properties only) (Page 310)
 - 3. 9.3 Portal Settings General Entities (tab properties only) (Page 316)
 - 4. 9.4 Portal Settings General Documents (tab properties only) (Page 323)
 - 5. 9.5 Portal Settings General Notes (tab properties only) (Page 329)
 - 9.6 Portal Settings General Workflow (tab properties only) (Page 334)
 - 7. 9.7 Portal Settings General Timeslips (tab properties only) (Page 341)
 - 8. 9.8 Portal Settings General Weblinks (tab properties only) (Page 347)
 - 9. 9.9 Portal Settings General Folders (tab properties only) (Page 350)
 - 10. 9.10 Portal Settings General Unsaved Changes Exist (Page 353)
- 1.3.1.5. Detailed Scope – Forms, Listings and Dialog Boxes – Portal General
 - 1. 11.1 Select Portals (Page 721)
 - 11.2 Select Portal Folders (Page 724)
 - 11.3 Select Portal Footers (Page 727)
 - 11.4 Select Portal Headers (Page 730)
 - 11.5 Select Portal Image Groups (Page 733)
 - 11.6 Select Portal Images (Page 736)

- 7. 11.7 Select Portal Styles (Page 739)
- 8. 11.8 Select Portal Supporting Pages (Page 742)
- 9. 11.9 Select Portal Themes (Page 745)
- 10. 11.10 Select Publication (Page 748)
- 11. 11.11 Select Publication Source (Page 752)
- 1.3.1.6. Detailed Scope Forms, Listings and Dialog Boxes Portal Presentation
 - 1. 13.1 Portal Presentation Login Sample (Page 769)
 - 2. 13.2 Portal Presentation Home Page Sample (Page 771)
 - 3. 13.3 Portal Presentation Top-level Framework (Page 773)
 - 4. 13.4 Portal Presentation Section-level Framework (Page 774)
 - 5. 13.5 Portal Presentation Section-level Framework Title Construction (Page 776)
 - 6. 13.6 Portal Presentation Section-level Framework Folders and Subscriptions Construction (Page 778)
 - 7. 13.7 Portal Presentation Section-level Framework Priority Items Construction (Page 779)
 - 8. 13.8 Portal Presentation Section-level Framework Summary Construction (Page 780)
- 1.3.1.7. Detailed Scope Use Cases
 - 1. 6.1.1 Manage Portals Create Portal (Page 186)
 - 2. 6.1.2 Manage Portals Modify Portal (Page 188)
 - 3. 6.1.3 Manage Portals Set Options for Portal (Page 191)
 - 4. 6.1.5 Manage Portals Define Presentation for Portal (Page 193)
 - 5. 6.1.6 Manage Portals Define Supporting Pages for Portal (Page 195)
 - 6. 6.1.7 Manage Portals Activate/Deactivate Portal (Page 196)
 - 7. 6.1.8 Manage Portals Close Portal (Page 198)
 - 8. 6.2.1 Manage the Portal Menu Create Folder (Page 199)
 - 9. 6.2.2 Manage the Portal Menu Modify Folder (Page 202)
 - 10. 6.2.3 Manage the Portal Menu Define Presentation for Folder (Page 204)
 - 11. 6.2.4 Manage the Portal Menu Define Supporting Pages for Folder (Page 205)

- 12. 6.2.5 Manage the Portal Menu Activate/Deactivate Folder (Page 207)
- 13. 6.2.6 Manage the Portal Menu Copy Folder (Page 209)
- 14. 6.2.7 Manage the Portal Menu Move a Folder (Page 210)
- 15. 6.2.8 Manage the Portal Menu Delete Folder (Page 212)
- 16. 6.3.1 Manage Subscriptions Subscribe to a Publication (Page 215)
- 17. 6.3.2 Manage Subscriptions Modify a Subscription (Page 220)
- 18. 6.3.3 Manage Subscriptions Deactivate/Activate Subscription (Page 222)
- 19. 6.3.4 Manage Subscriptions Delete Subscription (Page 224)
- 20. 8.1.1 Publishing Items Publish Item (Page 292)
- 21. 8.1.2 Publishing Items Modify Existing Publication (Page 296)
- 22. 8.1.3 Publishing Items Assign Publication to Portals (Page 299)
- 23. 8.1.4 Publishing Items Activate/Deactivate Publication (Page 302)
- 24. 8.1.5 Publishing Items Delete Existing Publication (Page 304)
- 25. 10.1.1 Manage Portal Settings Set General Portal Settings (Page 601)
- 26. 12.1.1 Select Portal (Page 755)
- 27. 12.1.2 Select Portal Folder (Page 756)
- 28. 12.1.3 Select Portal Footer (Page 757)
- 29. 12.1.4 Select Portal Header (Page 758)
- 30. 12.1.5 Select Portal Image (Page 760)
- 31. 12.1.6 Select Portal Image Group (Page 761)
- 32. 12.1.7 Select Portal Style (Page 762)
- 33. 12.1.8 Select Portal Supporting Pages (Page 763)
- 34. 12.1.9 Select Portal Theme (Page 764)
- 35. 12.1.10 Select Publication (Page 765)
- 36. 12.1.11 Select Publication Source (Page 766)
- 37. 14.1.1 Access Portals Login to Portal (Page 783)
- 38. 14.1.2 Access Portals Present Portal (Page 784)
- 39. 14.1.3 Access Portals Change Portals (Page 790)
- 1.3.2. Phase 2 Portal Integration Development

1.3.2.1. General Scope

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. 9.11 Portal Settings Styles Listing (Page 354)
- 2. 9.12 Portal Settings Styles Listing Grid Layout Properties (Page 356)
- 3. 9.18 Portal Settings Style Properties Menu (Page 368)
- 4. 9.19 Portal Settings Style Properties Header (Page 371)
- 5. 9.20 Portal Settings Style Properties Content (Page 373)
- 6. 9.21 Portal Settings Style Properties Footer (Page 376)
- 7. 9.22 Portal Settings Style Properties Save As (Page 378)
- 8. 9.23 Portal Settings Style Properties Unsaved Changes Exist (Page 380)
- 9. 9.24 Portal Settings Style Properties Default Exists (Page 381)
- 10. 9.25 Portal Settings Style Properties Delete Confirmation (Page 382)
- 11. 9.30 Portal Settings Headers Listing (Page 389)
- 12. 9.31 Portal Settings Headers Listing Grid Layout Properties (Page 392)
- 13. 9.37 Portal Settings Header Properties (Page 404)
- 14. 9.38 Portal Settings Header Properties Save As (Page 407)
- 9.39 Portal Settings Header Properties Unsaved Changes Exist (Page 409)
- 16. 9.40 Portal Settings Header Properties Default Exists (Page 410)
- 17. 9.41 Portal Settings Header Properties Delete Confirmation (Page 411)

- 18. 9.46 Portal Settings Footers Listing (Page 418)
- 19. 9.47 Portal Settings Footers Listing Grid Layout Properties (Page 420)
- 20. 9.53 Portal Settings Footer Properties (Page 432)
- 21. 9.54 Portal Settings Footer Properties Save As (Page 435)
- 22. 9.55 Portal Settings Footer Properties Unsaved Changes Exist (Page 437)
- 23. 9.56 Portal Settings Footer Properties Default Exists (Page 438)
- 24. 9.57 Portal Settings Footer Properties Delete Confirmation (Page 439)
- 25. 9.62 Portal Settings Images Groups Listing (Page 446)
- 26. 9.63 Portal Settings Images Groups Listing Grid Layout Properties (Page 448)
- 27. 9.69 Portal Settings Image Group Properties (Page 461)
- 28. 9.70 Portal Settings Image Group Properties Unsaved Changes Exist (Page 463)
- 29. 9.71 Portal Settings Image Group Properties Default Exists (Page 464)
- 30. 9.72 Portal Settings Image Group Properties Delete Confirmation (Page 465)
- 31. 9.73 Portal Settings Images Images Listing (Page 466)
- 32. 9.74 Portal Settings Images Images Listing Grid Layout Properties (Page 469)
- 33. 9.80 Portal Settings Image Properties (Page 482)
- 34. 9.81 Portal Settings Image Properties Find File (Page 486)
- 35. 9.82 Portal Settings Image Properties Unsaved Changes Exist (Page 488)
- 36. 9.83 Portal Settings Image Properties Default Exists (Page 489)
- 37. 9.84 Portal Settings Image Properties Delete Confirmation (Page 490)
- 38. 9.85 Portal Settings Images Assign Images (Page 491)
- 39. 9.86 Portal Settings Images Assign Groups (Page 494)
- 40. 9.98 Portal Settings Supporting Pages Listing (Page 519)

- 41. 9.99 Portal Settings Supporting Pages Listing Grid Layout Properties (Page 522)
- 42. 9.105 Portal Settings Supporting Page Properties (Page 535)
- 43. 9.106 Portal Settings Supporting Page Properties Find File (Page 538)
- 44. 9.107 Portal Settings Supporting Page Properties Unsaved Changes Exist (Page 540)
- 45. 9.108 Portal Settings Supporting Page Properties Default Exists (Page 541)
- 46. 9.109 Portal Settings Supporting Page Properties Delete Confirmation (Page 542)
- 47. 9.110 Portal Settings Themes Listing (Page 543)
- 48. 9.111 Portal Settings Themes Listing Grid Layout Properties (Page 546)
- 49. 9.117 Portal Settings Theme Properties (Page 558)
- 50. 9.118 Portal Settings Theme Properties Save As (Page 566)
- 51. 9.119 Portal Settings Theme Properties Unsaved Changes Exist (Page 568)
- 52. 9.120 Portal Settings Theme Properties Default Exists (Page 569)
- 53. 9.121 Portal Settings Theme Properties Delete Confirmation (Page 570)
- 54. 9.122 Portal Settings Publications Listing (Page 571)
- 55. 9.123 Portal Settings Publications Listing Grid Layout Properties (Page 575)
- 1.3.2.3. Detailed Scope Use Cases
 - 1. 10.2.1 Manage Styles List Styles (Page 604) No Printing
 - 2. 10.2.2 Manage Styles Create New Style (Page 609)
 - 3. 10.2.3 Manage Styles Copy Existing Style (Page 611)
 - 4. 10.2.4 Manage Styles Modify Existing Style (Page 615)
 - 5. 10.2.6 Manage Styles Deleting Existing Style (Page 619)
 - 6. 10.3.1 Manage Headers List Headers (Page 620) No Printing
 - 7. 10.3.2 Manage Headers Create New Header (Page 625)
 - 8. 10.3.3 Manage Headers Copy Existing Header (Page 627)
 - 9. 10.3.4 Manage Headers Modify Existing Header (Page 630)

- 10. 10.3.6 Manage Headers Deleting Existing Header (Page 634)
- 11. 10.4.1 Manage Footers List Footers (Page 635) No Printing
- 12. 10.4.2 Manage Footers Create New Footer (Page 640)
- 13. 10.4.3 Manage Footers Copy Existing Footer (Page 642)
- 14. 10.4.4 Manage Footers Modify Existing Footer (Page 645)
- 15. 10.4.6 Manage Footers Deleting Existing Footer (Page 649)
- 16. 10.5.1 Manage Image Settings List Image Groups (Page 650) No Printing
- 17. 10.5.2 Manage Image Settings Create New Image Group (Page 655)
- 18. 10.5.3 Manage Image Settings Modify Existing Image Group (Page 657)
- 19. 10.5.4 Manage Image Settings Deleting Existing Image Group (Page 659)
- 20. 10.5.5 Manage Image Settings List Images (Page 660) No Printing
- 21. 10.5.6 Manage Image Settings Create New Image (Page 665)
- 22. 10.5.7 Manage Image Settings Modify Existing Image (Page 667)
- 23. 10.5.8 Manage Image Settings Deleting Existing Image (Page 670)
- 24. 10.5.9 Manage Image Settings Assign Images to Image Groups (Page 671) No Listing or Printing
- 25. 10.6.1 Manage Supporting Pages List Supporting Pages (Page 685) No Printing
- 26. 10.6.2 Manage Supporting Pages Create New Supporting Page (Page 690)
- 27. 10.6.3 Manage Supporting Pages Modify Existing Supporting Page (Page 692)
- 28. 10.6.4 Manage Supporting Pages Deleting Existing Supporting Page (Page 694)
- 29. 10.7.1 Manage Themes List Themes (Page 696) No Printing
- 30. 10.7.2 Manage Themes Create New Theme (Page 701)
- 31. 10.7.3 Manage Themes Copy Existing Theme (Page 704)
- 32. 10.7.4 Manage Themes Modify Existing Theme (Page 707)
- 33. 10.7.5 Manage Themes Deleting Existing Theme (Page 710)
- 34. 10.8.1 Manage Publications List Publications (Page 712) No Printing

1.3.3. Phase 3 Portal Integration Development

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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. 5.4 Portal Management General Billing Information (Page 63)
 - 2. 7.14 Publication Properties Listing (Page 287)
- 1.3.3.3. Detailed Scope Forms, Listings and Dialog Boxes Portal Settings
 - 9.13 Portal Settings Styles Listing Report Settings General (Page 359)
 - 9.14 Portal Settings Styles Listing Report Settings Custom (Page 361)
 - 3. 9.15 Portal Settings Styles Listing Report Settings General Save Report (save) (Page 364)
 - 4. 9.16 Portal Settings Styles Listing Report Settings General Save Report (exists) (Page 366)
 - 5. 9.17 Portal Settings Styles Listing Report Settings General Save Report Success (Page 367)
 - 6. 9.26 Portal Settings Style Properties Report Settings General (Page 383)
 - 7. 9.27 Portal Settings Style Properties Report Settings General Save Report (save) (Page 385)
 - 8. 9.28 Portal Settings Style Properties Report Settings General Save Report (exists) (Page 387)
 - 9. 9.29 Portal Settings Style Properties Report Settings General Save Report Success (Page 388)

- 10. 9.32 Portal Settings Headers Listing Report Settings General (Page 395)
- 11. 9.33 Portal Settings Headers Listing Report Settings Custom (Page 397)
- 12. 9.34 Portal Settings Headers Listing Report Settings General Save Report (save) (Page 400)
- 13. 9.35 Portal Settings Headers Listing Report Settings General Save Report (exists) (Page 402)
- 14. 9.36 Portal Settings Headers Listing Report Settings General Save Report Success (Page 403)
- 15. 9.42 Portal Settings Header Properties Report Settings General (Page 412)
- 9.43 Portal Settings Header Properties Report Settings General Save Report (save) (Page 414)
- 17. 9.44 Portal Settings Header Properties Report Settings General Save Report (exists) (Page 416)
- 9.45 Portal Settings Header Properties Report Settings General Save Report Success (Page 417)
- 19. 9.48 Portal Settings Footers Listing Report Settings General (Page 423)
- 20. 9.49 Portal Settings Footers Footers Report Settings Custom (Page 425)
- 21. 9.50 Portal Settings Footers Listing Report Settings General Save Report (save) (Page 428)
- 22. 9.51 Portal Settings Footers Listing Report Settings General Save Report (exists) (Page 430)
- 23. 9.52 Portal Settings Footers Listing Report Settings General Save Report Success (Page 431)
- 24. 9.58 Portal Settings Footer Properties Report Settings General (Page 440)
- 25. 9.59 Portal Settings Footer Properties Report Settings General Save Report (save) (Page 442)
- 26. 9.60 Portal Settings Footer Properties Report Settings General Save Report (exists) (Page 444)
- 27. 9.61 Portal Settings Footer Properties Report Settings General Save Report Success (Page 445)
- 28. 9.64 Portal Settings Images Groups Listing Report Settings General (Page 451)

- 29. 9.65 Portal Settings Images Groups Listing Report Settings Custom (Page 454)
- 30. 9.66 Portal Settings Images Groups Listing Report Settings General Save Report (save) (Page 457)
- 31. 9.67 Portal Settings Images Groups Listing Report Settings General Save Report (exists) (Page 459)
- 32. 9.68 Portal Settings Images Groups Listing Report Settings General Save Report Success (Page 460)
- 33. 9.75 Portal Settings Images Images Listing Report Settings General (Page 472)
- 34. 9.76 Portal Settings Images Images Listing Report Settings Custom (Page 475)
- 35. 9.77 Portal Settings Images Images Listing Report Settings General Save Report (save) (Page 478)
- 36. 9.78 Portal Settings Images Images Listing Report Settings General Save Report (exists) (Page 480)
- 37. 9.79 Portal Settings Images Images Listing Report Settings General Save Report Success (Page 481)
- 38. 9.87 Portal Settings Images Image Group Assignments Listing (Page 497)
- 39. 9.88 Portal Settings Images Image Group Assignments Listing Grid Layout Properties (Page 499)
- 40. 9.89 Portal Settings Images Image Group Assignments Filter (Page 502)
- 41. 9.90 Portal Settings Images Image Group Assignments Filter Select Groups (Page 504)
- 42. 9.91 Portal Settings Images Image Group Assignments Filter Select Portal Images (Page 506)
- 43. 9.92 Portal Settings Image Group Assignments Report Settings General (Page 508)
- 44. 9.93 Portal Settings Image Group Assignments Report Settings Custom (Page 511)
- 45. 9.94 Portal Settings Image Group Assignments Report Settings General Save Report (save) (Page 514)
- 46. 9.95 Portal Settings Image Group Assignments Report Settings General Save Report (exists) (Page 516)
- 47. 9.96 Portal Settings Image Group Assignments Report Settings General Save Report Success (Page 517)

- 48. 9.97 Portal Settings Image Properties Unassign Confirmation (Page 518)
- 49. 9.100 Portal Settings Supporting Pages Listing Report Settings General (Page 525)
- 50. 9.101 Portal Settings Supporting Pages Listing Report Settings Custom (Page 528)
- 51. 9.102 Portal Settings Supporting Pages Listing Report Settings General Save Report (save) (Page 531)
- 52. 9.103 Portal Settings Supporting Pages Listing Report Settings General Save Report (exists) (Page 533)
- 53. 9.104 Portal Settings Supporting Pages Listing Report Settings General Save Report Success (Page 534)
- 54. 9.112 Portal Settings Themes Listing Report Settings General (Page 549)
- 55. 9.113 Portal Settings Themes Listing Report Settings Custom (Page 551)
- 56. 9.114 Portal Settings Themes Listing Report Settings General Save Report (save) (Page 554)
- 57. 9.115 Portal Settings Themes Listing Report Settings General Save Report (exists) (Page 556)
- 58. 9.116 Portal Settings Themes Listing Report Settings General Save Report Success (Page 557)
- 59. 9.124 Portal Settings Publications Listing Report Settings General (Page 578)
- 60. 9.125 Portal Settings Publications Listing Report Settings Custom (Page 581)
- 61. 9.126 Portal Settings Publications Listing Report Settings General Save Report (save) (Page 584)
- 62. 9.127 Portal Settings Publications Listing Report Settings General Save Report (exists) (Page 586)
- 63. 9.128 Portal Settings Publications Listing Report Settings General Save Report Success (Page 587)
- 64. 9.129 Portal Settings Publications Listing Filter (Page 588)
- 65. 9.130 Portal Settings Publications Listing Filter Select Portal Sites (Page 591)
- 66. 9.131 Portal Settings Publications Listing Filter Select Portals (Page 593)

- 67. 9.132 Portal Settings Publications Listing Filter Select Portal Types (Page 595)
- 68. 9.133 Portal Settings Publications Listing Filter Select Publications (Page 597)
- 69. 9.134 Portal Settings Publications Listing Remove Confirmation Publication (Page 599)
- 70. 9.135 Portal Settings Publications Listing Remove Confirmation Subscription (Page 600)

1.3.3.4. Detailed Scope – Use Cases

- 1. 6.1.4 Manage Portals Set Billing Options for Portal (Page 192)
- 2. 6.2.9 Manage the Portal Menu Filter the Menu (Page 213)
- 3. 10.2.1 Manage Styles List Styles (Page 604) Printing
- 4. 10.2.5 Manage Styles Print Style Properties (Page 617)
- 5. 10.3.1 Manage Headers List Headers (Page 620) Printing
- 6. 10.3.5 Manage Headers Print Header Properties (Page 632)
- 7. 10.4.1 Manage Footers List Footers (Page 635) Printing
- 8. 10.4.5 Manage Footers Print Footer Properties (Page 647)
- 9. 10.5.1 Manage Image Settings List Image Groups (Page 650) Printing
- 10. 10.5.5 Manage Image Settings List Images (Page 660) Printing
- 11. 10.5.10 Manage Image Settings List Image Assignments (Page 678) with Printing
- 12. 10.6.1 Manage Supporting Pages List Supporting Pages (Page 685) Printing
- 13. 10.7.1 Manage Themes List Themes (Page 696) Printing
- 14. 10.8.1 Manage Publications List Publications (Page 712) Printing

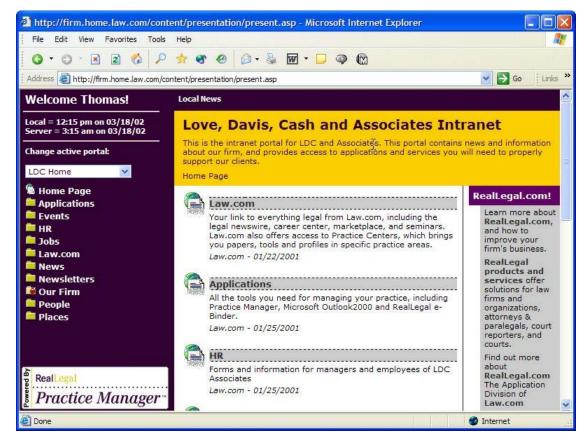
1.4. Scope of Document

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

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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:

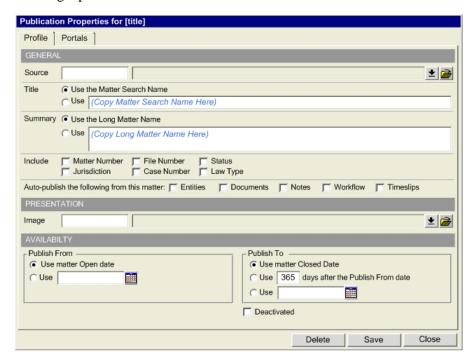
1. A Practice Manager data record which has been expressly designated as being available for presentation on one or more portals.

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.

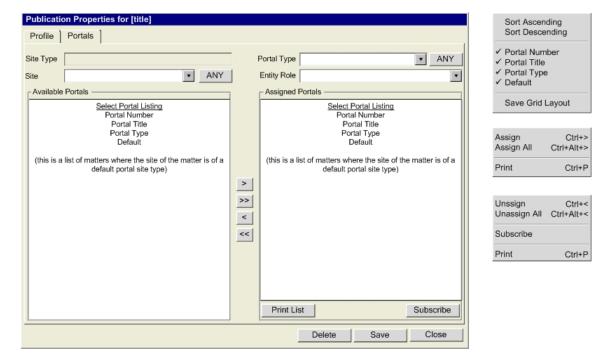
Each data record has only one publication record.

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

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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.

For more information on publications, see "Publications – Mockups" beginning on page 226 and "Publications – Use Cases" beginning on page 291.

Future Considations

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.

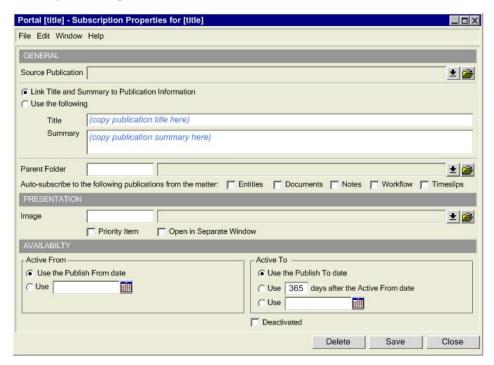
This could be a strong marketing point, and the Web site would also show our "dedication" to supporting the portal concept. And, if it were generated using our own Portal Integration, it would show the flexibility.

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.

For more information on subscriptions, see "Portal Management – General – Subscriptions" beginning on page 80 and "Manage Subscriptions Use Cases" beginning on page 215.

2.4. What is a **folder**?

A folder is a placeholder for subscriptions.

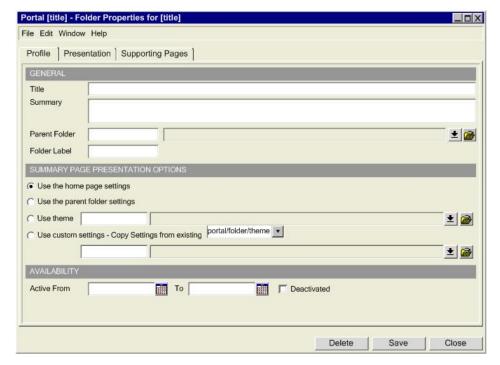
In the portal presentation, there are two representations for a folder:

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

Each folder has a corrending 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**.

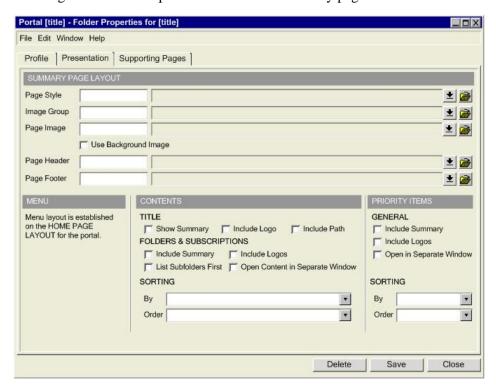


Each folder record provides data fields for defining a title, label, summary, representative image – logo and icon, and an availability date range for the folder.

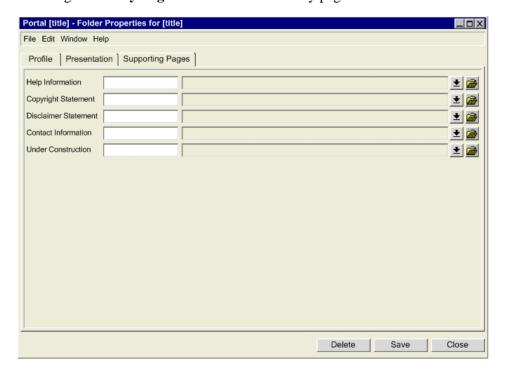
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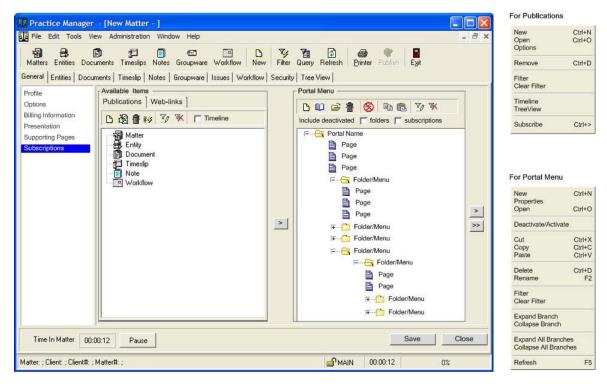
2. Defining **Presentation** options for the folder summary page.



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.

For more information on folders, see "Portal Management – General – Subscriptions" beginning on page 80 and "Manage the Portal Menu Use Cases" beginning on page 199.

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** (see 9.1 Portal Settings – General):

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 Considations

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.

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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 Considations

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 sumary page.

Future Considations

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.

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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 iconversion (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 acrosss the portal.

Future Considations

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 Considations

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.

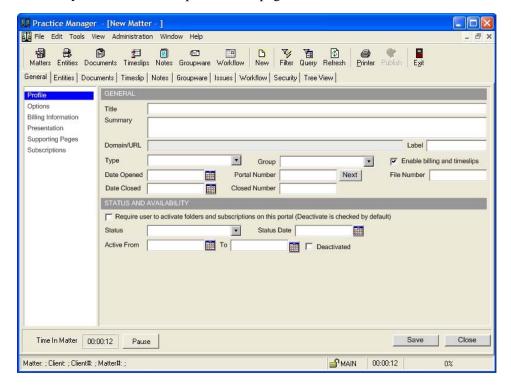
For more information, see "Mockups – Portal Settings" beginning on page 306 and "Manage Portal Settings Use Cases" beginning on page 601.

2.6. Creating Portals

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There are 5 major steps to creating a portal:

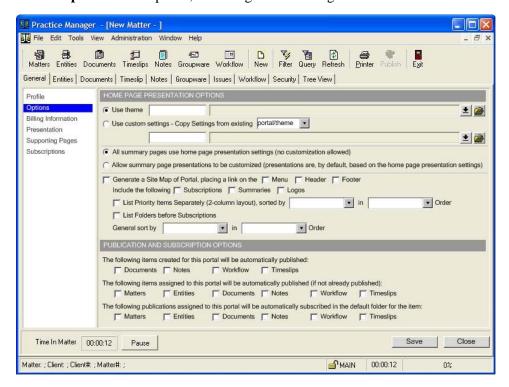
- 1. Log in to a **Site** where the **Site Type** is of the default portal site type.
- 2. Create a new portal matter, and defining a **Profile** for that portal, including the **Title** and **Summary** to be used on the portal home page.



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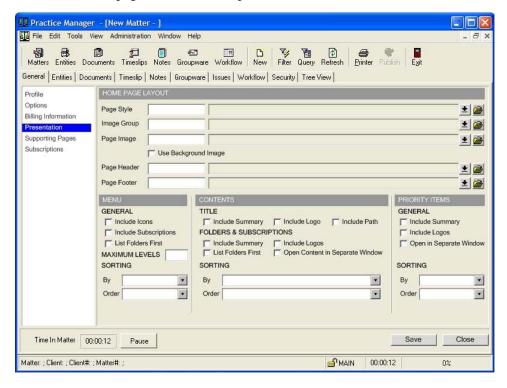
3. Define **Options** for the portal, including the following:



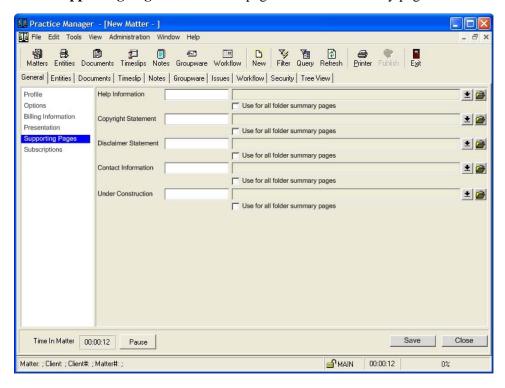
- a. Whether to use a theme the presentation, or copy the settings from an existing portal or theme
- b. Whether to allow a summary pages within the portal to look the same as the home page, or use custom settings.
- c. When to generate a site map, which can be accessed from a link on the menu, header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

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

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



the menu, and subscriptions can be placed inside the folders.

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Once the portal has been created, publications can be assigned to the portal, folders can be created for

For more information, see "Portal Management - Mockups" beginning on page 44 and "Manage Portals Use Cases" beginning on page 186.

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.

For more information, see "Portal Presentation – Mockups" beginning on page 769 and "Access Portals – Present Portal" beginning on page 784.

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 and 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.

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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 (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 (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 PMProf?	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.		

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?
Administer Portal Settings	The user can administer Portal Settings.	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 enabled.	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 enabled.	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

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

- 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.

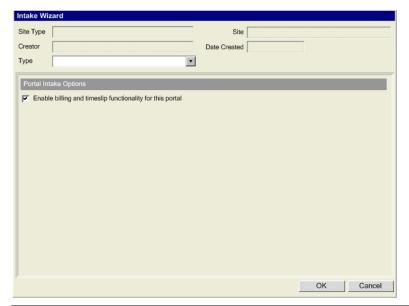
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Portal Management

5. Portal Management - Mockups

5.1. Intake Wizard – Portal Intake [Ph1]



General	Description
HelpID	Portal.Intake
Title	Intake Wizard → Portal Intake Options
Usage	Allows the user to start a new portal, enabling the proper set of general forms.
Туре	Modal Dialog
Open Focus	Туре
Tab Order	 Enable billing and timeslip functionality for this portal OK Cancel Type
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Intake Wizard Buttons	Function / Action	HelpID	Hot Key
Cancel	Terminates creating the portal.	Portal.Intake.Cancel	
ОК	Continues creating the portal.	Portal.Intake.OK	

Intake Wizard Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Created By	This is the name of the active user.	Read-only Text	See Definition	Υ		Intake.Wizard.Creat edBy	
Date Created	This is the date the portal is being created.	Read-only Date	See Definition	Υ	Υ	Intake.Wizard.Date Created	
Site	This is the descripiton of the active user site.	Read-only Text	See Definition	Υ		Intake.Wizard.Site	
Site Tyoe	This is the desciption of the active user site's site type.	Read-only Text	See Definition	Υ	N	Intake.Wizard.SiteT ype	
Туре	This is a look-up on Law Types. In future versions, these will be types assigned to the Site; but for now, show all Law Types.	Drop-down List	Null	Y	Υ	Intake.Wizard.Type	

Portal Intake Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Enable billing and timeslip functionality for this portal.	When checked, the timeslip tab appears, as does the Billing Information branch. When not checked, both are hidden. The user is not restricted from creating a timeslip for this portal matter, but it is not "encouraged" through the portal maintenance UI.	Checkbox	Yes	N	N	Portal.Intake.Enable Billing	

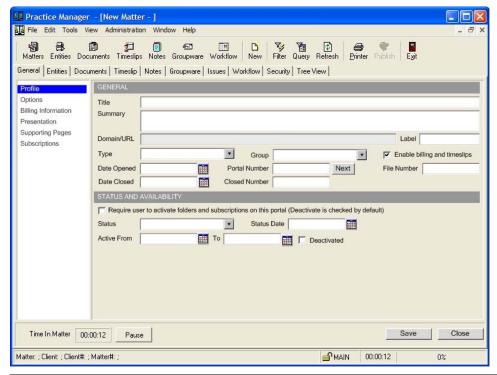
Special Rules and Clarifications

1. The Intake Wizard is part of core PM, and may or may not look like the above image. The nested form for portals should display as indicated.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/28/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

5.2. Portal Management – General – Profile [Ph1]



General	Description				
HelpID	Portal.General.Profile				
Title	Seneral → Profile				
Usage	Defines the general portal profile information.				
Туре	Multi-page DE form				
Open Focus	Title				
Tab Order	 Summary Label Type Group Enable billing and timeslips Date Opened Date Opened – Lookup Portal Number Next File Number Date Closed Date Closed Date Closed + Lookup Closed Number Require user to activate folders and subscriptions on this portal Status Status Date Active From Active From - Lookup 				

General	Description
	19. Active To 20. Active To – Lookup 21. Deactivated 22. Pause* 23. Save*
	24. Close* 25. Title * Note: These buttons are part of the matter framework. If there tab order is different, that is okay. The tab order of the matter framework is beyond the scope of this FDS.
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.7 Manage Portals – Activate/Deactivate Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key			
Active From – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Profile.ActiveFrom.Lookup				
Active To – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Profile.ActiveTo.Lookup				
Close	Closes the portal window. This is part of the matter fra	mework, and is beyond the scope of this specification.				
Date Closed – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Profile.DateClosed.Lookup				
Date Opened – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Profile.DateOpened.Lookup				
Next	If automatic matter numbering is enabled, gets the next number. This button only appears for new portals.	Portal.General.Profile.Next				
Pause	Pauses/restarts the time. This is part of the matter fram	nework, and is beyond the scope of this specification.				
Save	Saves the portal. This is part of the matter framework,	Saves the portal. This is part of the matter framework, and is beyond the scope of this specification.				
Status Date – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Profile.StatusDate.Lookup				

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From	This is the date from which the portal will be active and can be presented.	Date	Null	N	N	Portal.General.Profil e.ActiveFrom	
	If null, the portal cannot be presented.						
Active To	This is the date through which the portal will be active and can be presented. If null, there is no	Date	Null	N	N	Portal.General.Profil e.ActiveTo	
	expiration date on the portal.						
Closed Number	This is a closed file tracking number for the portal.	Same as Matter Closed Number	Null	N	N	Portal.General.Profil e.ClosedNumber	
Date Closed	This is the user- defined date the portal was closed.	Date – Samed as Matter Date Opened	Null	N	N	Portal.General.Profil e.DateClosed	
Date Opened	This is the user- defined date the portal was opened.	Date – Samed as Matter Date Opened	Null	N	N	Portal.General.Profil e.DateOpened	
Deactivated	If selected, the portal cannot be presented, even of the Active From date has not passed.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked.	N	N	Portal.General.Profil e.Deactivated	
			Otherwise, this field is not checked by default.				
Domain/URL	This is the root domain/URL of the portal.	Read-only text – not stored with the portal.	The value in this field comes from the Portal Settings – General page.	n/a	n/a	Portal.General.Profil e.Domain/URL	
Enable billing and timeslips	When checked, the billing branch and timeslip tab are visible.	Checkbox	Selection from Intake. Default is Yes.	N	N	Portal.General.Profil e.Enablebillingandti meslips	
	When not checked, the billing branch and timeslip tab are not visible.						
File Number	This is a file tracking number for the portal.	Same as Matter File Number	Null	N	N	Portal.General.Profil e.FileNumber	
Group	This is an option grouping for portals	Drop-down List: Sames as Matter	Null	N	N	Portal.General.Profil e.Group	

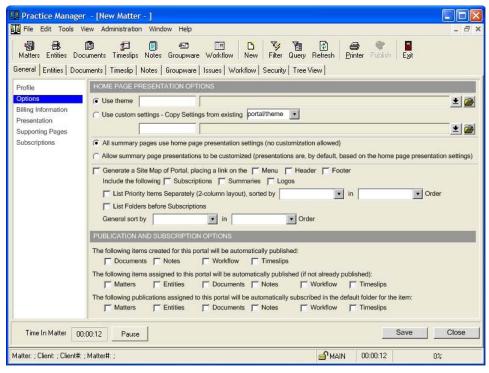
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
		Туре					
Label	This is a label for identifying the portal on the site map, as well as in the portal lookup on the portal menu.	Label	Null	Υ	Υ	Portal.General.Profil e.Code	
	If a user belongs to more than one portal, this is the value they would see in the dropdown list of the menu on the portal presentation.						
Portal Number	This is a number that identifies that portal.	Same as Matter Number.	Null	N	N	Portal.General.Profil e.PortalNumber	
Require user to activate folders and subscriptions on this portal	When checked, the Deactivated button on all folders subscriptions will be checked by default when the item is created. The use will then have to unchecked the item in order to activate it.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is disabled and checked. Otherwise, this field is not checked by default.	N	N	Portal.General.Profil e.RequireActivate	
Status	This is the status of the portal.	Drop-down List: Same as matter status	Null	N	N	Portal.General.Profil e.Status	
Status Date	This is the date the portal status was opened.	Date – Samed as Matter Status Date	Null	N	N	Portal.General.Profil e.StatusDate	
Summary	This is a summary of the portal. Through presentation options, this summary can appear below the title on the home page.	Same as Long Matter Name.	Null	N	N	Portal.General.Profil e.Summary	
Title	This is the title of the portal. It appears in the title area on the home page.	Same as Matter Search Name	Null	Υ	Υ	Portal.General.Profil e.Title	
Туре	This is the type of portal.	Drop-down List: Same as Law Type	Null	Υ	Υ	Portal.General.Profil e.Type	

	Special Rules and Clarifications
1.	None.

Printed: 06/12/2018 Last Updated: 07/15/2003

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/01/2002	TAF	Original Mockup
1.01	03/05/2002	TAF	Changed Code to Label.
1.06	03/06/2002	TAF	Split Profile into two pages – Profile and Options
1.10	03/18/2002	TAF	Final mockup for development review and coding.

5.3. Portal Management – General – Options [Ph1]



General	Description							
HelpID	Portal.General.Options							
Title	General → Options							
Usage	Defines the options for the portal, including presentation rules, publication rules and subscription rules							
Туре	/lulti-page DE form							
Open Focus	Use theme							
Tab Order	 Use theme – Code Use theme – Lookup Use theme – Open Use custom settings Copy settings from existing Copy settings from existing – Code Copy settings from existing – Lookup Copy settings from existing – Open All summary pages use home page presentation settings (no customization Allow summary page presentations to be customized Generate a Portal Menu of Portal, placing a link on the Generate a Portal Menu of Portal, placing a link on the – Menu Generate a Portal Menu of Portal, placing a link on the – Header Generate a Portal Menu of Portal, placing a link on the – Footer Including the following – Subscriptions Including the following – Summaries Including the following – Logos List Priority Items Separately (2-column layout) 							

General	Description
	19. sorted by 20. in (order) 21. List Folders before Subscriptions 22. General sort by 23. in (order) 24. The following Items created for this portal will be automatically published – Documents 25. The following Items created for this portal will be automatically published – Notes 26. The following Items created for this portal will be automatically published – Workflow 27. The following Items created for this portal will be automatically published – Timeslips 28. The following items assigned to this portal will be automatically published – Matters 29. The following items assigned to this portal will be automatically published – Entities 30. The following items assigned to this portal will be automatically published – Documents 31. The following items assigned to this portal will be automatically published – Notes 32. The following items assigned to this portal will be automatically published – Workflow 33. The following items assigned to this portal will be automatically published – Workflow 34. The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Matters 35. The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Entitiies 36. The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Notes 37. The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Notes 38. The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Notes 39. The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Notes 30. The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Notes 30. The following publications assigned to this portal will be automatically subscribed in the default folder for t
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.3 Manage Portals – Set Options for Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal 12.1.1 Select Portal 12.1.9 Select Portal Theme
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key					
Close	Closes the portal window. This is part of the matter framework, and is beyond the scope of this specification.							
Copy settings from existing – Lookup	If Portal is selected in the Copy settings from existing field, this displays the Select Portal window.	Portal.General.Options.Copysettingsfromexisting.Loo kup						
	If Theme is selected in the Copy settings from existing field, this displays the Select Theme window.							
Copy settings from existing – Open	If Portal is selected in the Copy settings from existing field, this opens the Portal Properties window for the selected portal.	Portal.General.Options.Copysettingsfromexisting.Op en						
	If Theme is selected in the Copy settings from existing field, , this opens the Theme Properties window for the selected theme.							
Pause	Pauses/restarts the time. This is part of the matter fram	nework, and is beyond the scope of this specification.						
Save	Saves the portal. This is part of the matter framework,	and is beyond the scope of this specification.						
Use theme – Lookup	Displays the Select Theme window.	Portal.General.Options.Usetheme.Lookup						
Use theme – Open	Opens the Theme Properties window for the selected theme.	Portal.General.Options.Usetheme.Open						

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All summary pages use home page presentation settings	When selected, all summary pages within the portal use either the selected theme or the custom settings of the portal home page, depending on earlier selections.	Option 1 of 2 – In a set withsummary	Yes	Y	Υ	Portal.General.Optio ns.Allsummarypage susehomepagepres entationsettings	
Allow summary page presentations to be customized	When selected, allows the presentation pages for summary pages to be edited. By default, the values from the home page presentation are automatically copied into the summary page presentation, where they can be edited.	Option 2 of 2 – In a set withsummary	No	Y	Y	Portal.General.Optio ns.Allowsummarypa gepresentationstobe customized	
Copy settings from existing	Allows the presentation values from an existing portal or theme to be copied to the active portal.	Drop-down List: Portal Theme	Portal	n/a	n/a	Portal.General.Optio ns.Copysettingsfrom existing	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Copy settings from existing – Code	This is the code of the source portal or theme for custom settings.	Code – Searches for portals or themes (based on selection in the Copy settings from existing field) based on code.	Null	Y* if Copy- ing	Y* if Copy- ing	Portal.General.Optio ns.Copysettingsfrom existing.Code	
Copy settings from existing – Description	This is the description of the source portal or theme for custom settings.	Read-only text.	Null	Y* if Copy- ing	Y* if Copy- ing	Portal.General.Optio ns.Copysettingsfrom existing.Description	
Generate a Portal Menu of Portal	When checked, a Portal Menu will be created of the entitre portal as part of the presentation.	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p	
Generate a Portal Menu of Portal – General sort by	This is how folders and subscriptions will be sorted.	Drop-down List: None Alphanumeric Chronological	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.GeneralSortBy	
Generate a Portal Menu of Portal – in (order)	This is the order in which the folders and subscriptions will be sorted.	Drop-down List: Ascending Descending	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.GeneralSortOrder	
Generate a Portal Menu of Portal – Include the following – Subscriptions	By default, the Portal Menu only includes folders. This field is only	Checkbox	Null	N	N	Portal.General.Options.GenerateSiteMap.IncludeSubscriptions	
	enabled if Generate a Portal Menu of Portal is selected.						
Generate a Portal Menu of Portal – Include the following – Logos	folder/subscription titles. By default, the Portal Menu only displays titles.	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.IncludeLogos	
	This field is only enabled if Generate a Portal Menu of Portal is selected.						

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Generate a Portal Menu of Portal – Include the following – Summaries	When checked, the Portal Menu includes summaries, along with the folder/subscription titles. By default, the Portal Menu only displays titles. This field is only enabled if Generate a Portal Menu of Portal is selected.	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.IncludeSummaries	
Generate a Portal Menu of Portal – List Folders before Subscriptions	When checked, the folders will be listed first, followed by the subscriptions. This field is only enabled if Subscriptions are included.	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.ListFoldersFirst	
	The sorting rules will apply to the folders and subscriptions separately.						
Generate a Portal Menu of Portal – List Priority Items Separately	When checked, the priority items will be listed separately from non-priority items. The will use independent sorting.	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.ListPriorityItemsS ep	
	This produces a 2-column layout, with priority items in the right-hand column. This field is only enabled if Generate a Portal Menu of Portal is selected.						
Generate a Portal Menu of Portal – List Priority Items Separately – sorted by	This is how the priority items will be sorted. This field is only enabled if List Priority Items Separately is selected.	Drop-down List: None Alphanumeric Chronological	None.	N	N	Portal.General.Options.GenerateSiteMap.ListPriorityItemsSep.SortBy	
Generate a Portal Menu of Portal – List Priority Items Separately – in (order)	This is the order in which the priority items will be sorted. This field is only enabled if List Priority Items Separately is selected.	Drop-down List: Ascending Descending	Ascending if By is either Alphanumeric or Chronological. Otherwise, null.	N	N	Portal.General.Optio ns.GenerateSiteMa p.ListPriorityItemsS ep.SortOrder	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Generate a Portal Menu of Portal, placing a link on the - Footer	When checked, a link is placed on the far right side of the footer for the Site Map.	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.LinkonFooter	
	This field is only enabled if Generate a Portal Menu of Portal is selected.						
Generate a Portal Menu of Portal, placing a link on the – Header	When checked, a link is placed on the far right side of the header for the Site Map .	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.LinkonHeader	
	This field is only enabled if Generate a Portal Menu of Portal is selected.						
Generate a Portal Menu of Portal, placing a link on the – Menu	When checked, a link is placed at the end of the menu for the Site Map.	Checkbox	Null	N	N	Portal.General.Optio ns.GenerateSiteMa p.LinkonMenu	
	This field is only enabled if Generate a Portal Menu of Portal is selected.						
The following items assigned to this portal will be automatically published – Matters	When checked, assigning a matter to a portal automatically publishes that matter to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Matters tab. The image for the timeslip is taken from the Portal Settings – General – Timeslips tab and appears	Checkbox	Null This field only appears if the Allow matters assigned to a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Matters tab.	N	N	Portal.General.Optio ns.AutoPubAssigne dItems.Matters	
	tab, and appears based on Presentation selections.						

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
The following items assigned to this portal will be automatically published – Entities	When checked, assigning a entity to a portal automatically publishes that entity to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Entities tab. The image for the timeslip is taken from the Portal Settings – General – Timeslips tab, and appears based on Presentation selections.	Checkbox	This field only appears if the Allow entities assigned to a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Entities tab.	N	N	Portal.General.Optio ns.AutoPubAssigne dItems.Entities	
The following items assigned to this portal will be automatically published – Documents	When checked, assigning a document to a portal automatically publishes that document to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Documents tab. The image for the timeslip is taken from the Portal Settings – General – Timeslips tab, and appears based on Presentation selections.	Checkbox	Null This field only appears if the Allow documents assigned to a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Documents tab.	N	N	Portal.General.Options.AutoPubAssignedItems.Documents	
The following items assigned to this portal will be automatically published – Notes	When checked, assigning a note to a portal automatically publishes that note to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Notes tab. The image for the timeslip is taken from the Portal Settings – General – Timeslips tab, and appears based on Presentation selections.	Checkbox	This field only appears if the Allow notes assigned to a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Notes tab.	N	N	Portal.General.Optio ns.AutoPubAssigne dItems.Notes	

Fields (label)	s:Riobamba Functional Definition	Properties	Default	UI	db	HelpID	Hot
	2 0		23.44.1	Reqd	Reqd	1.0.0.5	Key
The following items assigned to this portal will be automatically published – Workflow	When checked, assigning a workflow item to a portal automatically publishes that workflow item to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Workflow tab. The image for the timeslip is taken from the Portal Settings – General – Timeslips tab, and appears based on Presentation selections.	Checkbox	Null This field only appears if the Allow workflow items assigned to a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Workflow tab.	N	N	Portal.General.Optio ns.AutoPubAssigne dItems.Workflow	
The following items assigned to this portal will be automatically published – Timeslips	When checked, assigning a timeslip to a portal automatically publishes that timeslip to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Timeslips tab. The image for the timeslip is taken from the Portal Settings – General – Timeslips tab, and appears based on Presentation selections.	Checkbox	Null This field only appears if the Allow timeslips assigned to a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Timeslips tab.	N	N	Portal.General.Options.AutoPubAssignedItems.Timeslips	
The following items created for this portal will be automatically published – Documents	When checked, creating a document for the portal automatically publishes that document to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Documents tab. The image for the document is taken from the Portal Settings – General – Documents tab, and appears based on Presentation selections.	Checkbox	Null This field only appears if the Allow documents created for a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Documents tab.	N	N	Portal.General.Optio ns.AutoPubCreatedI tems.Documents	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
The following items created for this portal will be automatically published – Notes	When checked, creating a note for the portal automatically publishes that note to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Notes tab. The image for the note is taken from the Portal Settings – General – Notes tab, and appears based on Presentation selections.	Checkbox	Null This field only appears if the Allow notes created for a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Notes tab.	N	N	Portal.General.Optio ns.AutoPubCreatedI tems.Notes	
The following items created for this portal will be automatically published – Workflow	When checked, creating a workflow item for the portal automatically publishes that workflow item to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Workflow tab. The image for the workflow item is taken from the Portal Settings – General – Workflow tab, and appears based on Presentation selections.	Checkbox	Null This field only appears if the Allow workflow items created for a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Workflow tab.	N	N	Portal.General.Options.AutoPubCreatedItems.Workflow	
The following items created for this portal will be automatically published – Timeslips	When checked, creating a timeslip for the portal automatically publishes that timeslip to the portal, using the Publication and Subscription Options rules from the Portal Settings – General Timeslips tab. The image for the timeslip is taken from the Portal Settings – General – Timeslips tab, and appears based on Presentation selections.	Checkbox	Null This field only appears if the Allow timeslips created for a portal to be automatically published using the Publishing rules is selected on the Portal Settings – General – Timeslips tab.	N	N	Portal.General.Optio ns.AutoPubCreatedI tems.Timeslips	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Matters	When checked, matter publications are automatically subscribed to on the portal, and placed in the default folder for matters. This functionality requires that the matter branch of the publication tree have an auto-subscription defined.	Checkbox	Null This field only appears if the Allow matter publications to be automatically subscribed to on portals is selected on the Portal Settings – General – Matters tab.	N	N	Portal.General.Optio ns.AutoSubPubItem s.Matters	
The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Entities	When checked, entity publications are automatically subscribed to on the portal, and placed in the default folder for entities. This functionality requires that the entity branch of the publication tree have an auto-subscription defined.	Checkbox	Null This field only appears if the Allow entity publications to be automatically subscribed to on portals is selected on the Portal Settings – General – Entities tab.	N	N	Portal.General.Optio ns.AutoSubPubItem s.Entities	
The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Documents	When checked, document publications are automatically subscribed to on the portal, and placed in the default folder for documents. This functionality requires that the document branch of the publication tree have an autosubscription defined.	Checkbox	Null This field only appears if the Allow document publications to be automatically subscribed to on portals is selected on the Portal Settings – General – Documents tab.	N	N	Portal.General.Optio ns.AutoSubPubItem s.Documents	
The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Notes	When checked, note publications are automatically subscribed to on the portal, and placed in the default folder for notes. This functionality requires that the note branch of the publication tree have an auto-subscription defined.	Checkbox	Null This field only appears if the Allow note publications to be automatically subscribed to on portals is selected on the Portal Settings – General – Notes tab.	N	N	Portal.General.Optio ns.AutoSubPubItem s.Notes	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Workflow	When checked, workflow item publications are automatically subscribed to on the portal, and placed in the default folder for workflow items. This functionality requires that the workflow item branch of the publication tree have an autosubscription defined.	Checkbox	Null This field only appears if the Allow workflow item publications to be automatically subscribed to on portals is selected on the Portal Settings – General – Workflow tab.	N	N	Portal.General.Optio ns.AutoSubPubItem s.Workflow	
The following publications assigned to this portal will be automatically subscribed in the default folder for the item – Timeslips	When checked, timeslip publications are automatically subscribed to on the portal, and placed in the default folder for timeslips. This functionality requires that the timeslip branch of the publication tree have an auto-subscription defined.	Checkbox	Null This field only appears if the Allow timeslip publications to be automatically subscribed to on portals is selected on the Portal Settings – General – Timeslips tab.	N	N	Portal.General.Optio ns.AutoSubPubItem s.Timeslips	
Use custom settings	Allows the portal home page to use custom presentation settings.	Option – In a set with Use custom settings	Null	Y – Opt 1 of 2	Y – Opt 1 of 2	Portal.General.Options.Usecustomsettings	
Use theme	Uses a specific theme for the portal home page that can not be edited.	Option – In a set with Use custom settings	Yes	Y – Opt 1 of 2	Y – Opt 1 of 2	Portal.General.Optio ns.Usetheme	
Use theme – Theme	This is the Code and Description of the selected theme. Active only if Use them is selected.	Code – Searches for themes based on code. Description – Read- only text description of the selected theme.	Null	Y – if Use theme = Y	Y – if Use theme = Y	Portal.General.Optio ns.Usetheme.Them e	

Special Rules and Clarifications

- 1. If **Use theme** is selected, the **Presentation** and **Supporting Pages** DE forms are read-only for the Portal Home Page.
- If Use custom settings is selected, the Presentation and Supporting Pages DE forms can be edited.
- 3. If Portal is selected in the Copy settings from existing field, the lookup is on portals.
- 4. If Theme is selected in the Copy settings from existing field, the lookup is on themes.
- 5. When a portal or theme is selected in the Copy settings from existing field, those values are copied to the Presentation and Supporting Pages DE forms.
- 6. If All summary pages use home page presentation settings is selected, select Use the home page settings on all folder Options pages and disable Use theme and Use custom settings. The folder Presentation pages will be read-only.

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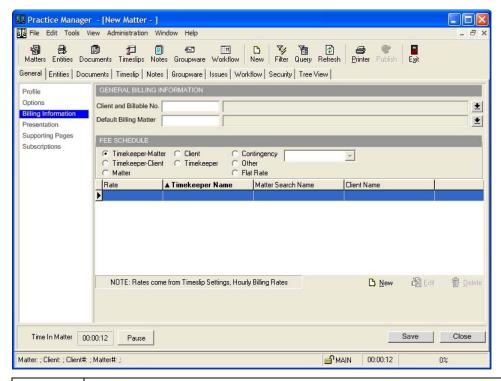
Special Rules and Clarifications

7. If Allow summary page presentations to be customized is selected, select Use the home page settings on all folder Options pages, but keep Use theme and Use custom settings enabled so the user can change the folder settings if they want.

Rev No.	Rev Date	Rev By	Revision Description					
1.00	03/06/2002	TAF	Original Mockup					
1.10	03/18/2002	TAF	Final mockup for development review and coding.					

Printed: 06/12/2018 Last Updated: 07/15/2003

5.4. Portal Management – General – Billing Information [Ph3]



General	Description
HelpID	Portal.General.Billing.
Title	General → Billing Information
Usage	Defines billing information for the portal.
	This window only appears if the Enable billing and timeslips is selected on the Profile page.
Туре	Multi-page DE form
Open Focus	Client and Billable No. – Code (Note that the label on this field may change depending on System Settings)
Tab Order	 Client and Billable No. – Lookup Default Billing Matter – Code Default Billing Matter. – Lookup Fee Schedule fields (the tabe order is determined by that form, and is beyond the scope of this FDS) Pause* Save* Close* *Note: These buttons are part of the matter framework. If there tab order is different, that is okay. The tab order of the matter framework is beyond the scope of this FDS.
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.4 Manage Portals – Set Billing Options for Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal

General	Description
Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID					
Client/Billable - Lookup	Displays the Select Entity window, pre-filtered on client entities, billable entities or both, depending on the selection in System Settings . This is the same functionality as the Client/Billable lookup on the General matter information table.	Portal.General.Billing.Client_Billable.Lookup					
Close	Closes the portal window. This is part of the matter framework, and is beyond the scope of this specification.						
Default Billing Matter – Lookup	Displays a list of Matters from which the user can select an alternate for which to generate timeslips. This is in the even the portal is for a matter, and the client wants the timeslips for the portal and matter to be billed as one. Portal.General.Billing.DefaultBillingMatter.Lookup						
Fee Schedule Buttons	These are part of the Fee Schedule DE form, which is beyond the sope of this specification.						
Pause	Pauses/restarts the time. This is part of the matter framework, and is beyond the scope of this specification.						
Save	Saves the portal. This is part of the matter framework, and is beyond the scope of this specification.						

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Client/Billable	This is the code and name for the client/billable entitiy. This is the same functionality as the Client/Billable lookup on the General matter information table.	Code – Searches for client entitities, billable entities or both, depending on the selection in System Settings, using the entity code. Name – Read-only Full Name of the selected entity. This is the same functionality as the Client/Billable lookup on the General matter information table.	Null	N	N	Portal.General.Billin g.ClientBillableEntit y	

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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Billing Matter	This is the number and name for the default billing matter. This field is not active until a Client/Billable entity is selected. The list of available matters for this field should be filtered on only those matters for the selected Client/Billable entity.	Number – Searches for matters using the Matter Number. Name – Read-only Matter Search Name of the selected matter.	Null This field is automatically populated with the active portal matter. The user can change this to a different matter.	Y	Υ	Portal.General.Billin g.DefaultBillingMatt er	
Fee Schedule Fields	These are part of the Fe	ee Schedule DE form,	which is beyond the so	pe of th	is specifi	ication.	

Special Rules and Clarifications

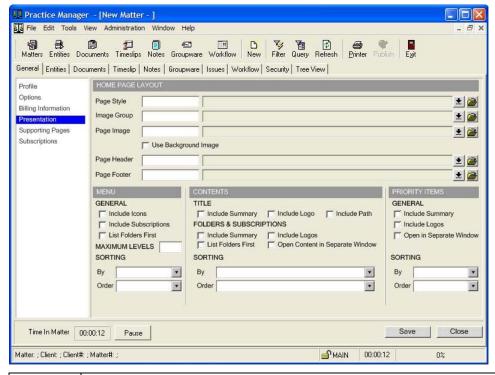
 When timeslips are generated, the **Default Billing Matter** automatically populates the **Matter** field. This can be changed on the timeslip.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	03/01/2002	TAF	Original Mockup			
1.01	03/06/2002	TAF	Added Options to page listing.			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

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Last Updated: 07/15/2003

5.5. Portal Management – General – Presentation [Ph1]



General	Description						
HelpID	Portal.General.Presentation						
Title	General → Presentation						
Usage	Defines the Presentation properties for the portal home page. This page is read-only if Use theme is selected on the Profile						
Туре	Standard Multi-page DE form						
Open Focus	Page Style – Code						
Tab Order	 Page Style – Lookup Page Group – Code Image Group – Lookup Image Group – Open Page Image – Code Page Image – Lookup Page Image – Open Use Background Image Page Header – Code Page Header – Lookup Page Header – Open Page Footer – Code Page Footer – Code Page Footer – Lookup Page Footer – Lookup Page Footer – Lookup Page Footer – Include Icons 						

Last Updated: 07/15/2003

General	Description
GONOIGH	17. Menu – Include Subscriptions 18. Menu – List Folders First 19. Menu – Maximum Levels 20. Menu – Sorting – By 21. Menu – Sorting – Order 22. Contents – Title – Include Summary 23. Contents – Title – Include Logo 24. Contents – Title – Include Page 25. Contents – Folders & Subscriptions – Include Summary 26. Contents – Folders & Subscriptions – Include Logos 27. Contents – Folders & Subscriptions – List Folders First 28. Contents – Folders & Subscriptions – Open Content in Separate Window 29. Contents – Sorting – By 30. Contents – Sorting – Order 31. Priority Items – Include Summary 32. Priority Items – Include Summary 33. Priority Items – Include Logos 33. Priority Items – Sorting – By 35. Priority Items – Sorting – By 36. Pause* 37. Save* 38. Close* 39. Page Style – Code
	* Note: These buttons are part of the matter framework. If there tab order is different, that is okay. The tab order of the matter framework is beyond the scope of this FDS.
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.5 Manage Portals – Define Presentation for Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal 12.1.3 Select Portal Footer 12.1.4 Select Portal Header 12.1.5 Select Portal Image 12.1.6 Select Portal Image Group 12.1.7 Select Portal Style
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key			
Close	Closes the portal window. This is part of the matter framework, and is beyond the scope of this specification.					
Image Group – Lookup	Displays the Select Portal Image Groups window.	Portal.General.Presentation.ImageGroup.Lookup				
Image Group – Open	Opens the Image Group Properties window for the selected image group.	Portal.General.Presentation.ImageGroup.Open				
Page Footer – Lookup	Displays the Select Portal Footer window.	Portal.General.Presentation.PageFooter.Lookup				

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Buttons	Function / Action	HelpID	Hot Key				
Page Footer – Open	Opens the Footer Properties window for the selected footer.	Portal.General.Presentation.PageFooter.Open					
Page Header - Lookup	Displays the Select Portal Headers window.	Portal.General.Presentation.PageHeader.Lookup					
Page Header - Open	Opens the Header Properties window for the selected header.	Portal.General.Presentation.PageHeader.Open					
Page Image – Lookup	Displays the Select Portal Images window.	Portal.General.Presentation.PageImage.Lookup					
Page Image – Open	Opens the Image Properties window for the selected image.	Portal.General.Presentation.PageImage.Open					
Page Style – Lookup	Displays the Select Style window.	Portal.General.Presentation.PageStyle.Lookup					
Page Style – Open	Opens the Style Properties window for the selected style.	Portal.General.Presentation.PageStyle.Open					
Pause	Pauses/restarts the time. This is part of the matter framework, and is beyond the scope of this specification.						
Save	Saves the portal. This is part of the matter framework, and is beyond the scope of this specification.						

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Folders & Subscriptions – Include Logos	When checked, a logo will appear next to each folder and subscription on the home page. If not checked, the logo will not display, even if it exists in the supporting data record	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Υ	Portal.General.Pres entation.Contents.F olders_Subs.Include Logos	
Contents – Folders & Subscriptions – List Folders First	When checked, subfolders will be listed first on the home page, followed by subscriptions.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Υ	Portal.General.Pres entation.Contents.F olders_Subs.ListFol dersFirst	
Contents – Folders & Subscriptions – Open Content in Separate Window	When checked, subscriptions on the home page will open in a separate window. If this item is not checked, subscriptions will open in the main content window.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Υ	Υ	Portal.General.Pres entation.Contents.F olders_Subs.OpenC ontentinSeparateWi ndow	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Folders & Subscriptions – Include Summary	When checked, summary text, if available, will appear below each folder and subscription on the home page. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.Contents.F olders_Subs.ShowS ummary	
Contents – Sorting – By	Indicates how folders and subscriptions on the home page will be sorted. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: None Alphanumeric Chronological	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or None.	Y	Y	Portal.General.Pres entation.Contents.S orting.By	
Contents – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for folders and subscriptions on the home page. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: Ascending Descending	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or Ascending if By is Alphanumeric or Chronological.	Y – If "By" is not None.	Y – If "By" is not None.	Portal.General.Pres entation.Contents.S orting.Order	
Contents – Title – Include Logo	When checked, the logo will appear next to the title on the home page. If not checked, the logo will not appear.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.Contents.Ti tle.IncludeLogo	
Contents – Title – Include Path	When checked, the path to the current page will appear below the title on the home page using the Code value. Each level is a link back up the path. If not checked, the path will not appear.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Υ	Y	Portal.General.Pres entation.Contents.Ti tle.IncludePath	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Title – Include Summary	When checked, summary text, if available, will appear below the title on the home page. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.Contents.Ti tle.ShowSummary	
Image Group	This is the image group to use for the home page.	Code – Searches for image groups by code. Description – Read- only text description of the selected image group.	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.ImageGrou p	
Menu – General – Include Subscriptions	When checked, indicates the menu on will include subscriptions. If not checked, the menu will only include folders.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.Menu.Gene ral.IncludeContentIt ems	
Menu – General – Include Icons	When checked, indicates the menu will include icons. If not checked, no icons will appear on the menu.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Υ	Portal.General.Pres entation.Menu.Gene ral.Includelcons	
Menu – General – List Folders First	When checked, indicates the menu will list subfolders before subscription within a folder. If not checked, folders and subscriptions will be mixed together.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Υ	Υ	Portal.General.Pres entation.Menu.Gene ral.ListFoldersFirst	
Menu – General – Maximum Levels	This is the maximum number of levels the menu will appear. Folders or subscriptions below the Maximum Level will still be accessible by drilling down through summary page links.	Number	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Υ	Y	Portal.General.Pres entation.Menu.Gene ral.MaximumLevels	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Menu – Sorting – By	Indicates how the menu will be sorted. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: None Alphanumeric Chronological	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or None.	Y	Y	Portal.General.Pres entation.Menu.Sorti ng.By	
Menu – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for theh menu. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: Ascending Descending	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or Ascending if By is not Alphanumeric or Chronological.	Y – If "By" is not None.	Y – If "By" is not None.	Portal.General.Pres entation.Menu.Sorti ng.Order	
Page Footer	This is the footer to use for the home page.	Code – Searches for footers by code. Description – Read- only text description of the selected footer.	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.PageFooter	
Page Header	This is the header to use on the home page.	Code – Searches for headers by code. Description – Read- only text description of the selected header.	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.PageHeade r	
Page Image	This is the default image to use for the home page.	Code – Searches for images by code. Description – Read- only text description of the selected image.	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.PageImage	
Page Style	This is the style to use for the home page.	Code – Searches for styles by code. Description – Read- only text description of the selected style.	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.PageStyle	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Priority Items – General – Include Logos	When checked, a logo will appear next to each priority item on the home page. If not checked, the logo will not display, even if it exists in the supporting data record	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Υ	Portal.General.Pres entation.PriorityItem s.General.IncludeLo gos	
Priority Items – General – Open in Separate Window	When checked, priority items on the home page will open in a separate window. If this item is not checked, the priority item will open in the main content window.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.PriorityItem s.General.OpeninSe parateWindow	
Priority Items – General – Include Summary	When checked, summary text, if available, will appear below each priority item on the home page. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Y	Y	Portal.General.Pres entation.PriorityItem s.General.ShowSu mmary	
Priority Items – Sorting – By	Indicates how priority items on the home page will be sorted.	Drop-down List: None Alphanumeric Chronological	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or None.	Υ	Υ	Portal.General.Pres entation.PriorityItem s.Sorting.By	
Priority Items – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for priority items on the home page.	Drop-down List: Ascending Descending	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or Ascending if By is not Alphanumeric or Chronological.		Y – If "By" is not None.	Portal.General.Pres entation.PriorityItem s.Sorting.Order	
Use Background Image	Indicates the backrgound from the selected image will appears on the home page.	Checkbox	The default is based on the selection in the Home Page Presentation Options on the Options page of the portal, or null.	Υ	Υ	Portal.General.Pres entation.UserBackgr oundImage	

Special Rules and Clarifications

Last Updated: 07/15/2003

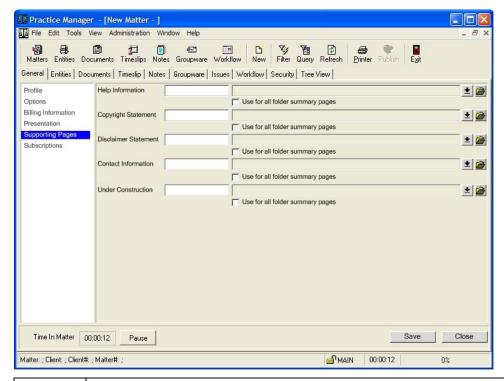
- 1. If **Use theme** is selected on the **Profile**, this page is read-only and displays the presentation values from the selected theme.
- 2. If Use custom settings is selected on the Profile, this page can be edited.
- 3. If Copy settings from existing is selected on the Profile, the fields on this form are pre-populated with the presentation values from the selected theme or portal.
- 4. For the Menu section, if Include Icons is selected, display the icon-version of the image for the folder or subscription.
- 5. For the Menu section, if Include Subscriptions is selected, the menu contains both folders and subscriptions..
- 6. For the Menu section, if List Folder First is selected, list folders first on each branch, followed by subscriptions, if included.
- 7. For the Menu section, only display the number of levels indicated in the Maximum Levels field.
- 8. For the **Menu** section, if **List Folders First** is checked, then the folders will be sorted by the Sorting By and Sorting Order selections independent of the subscriptions.
- 9. For the Title section, if Include Logo, Include Summary, and Include Path are checked, the presentation will use the large logo.
- 10. For the **Title** section, if **Include Logo** and **Include Summary** are checked, but **Include Path** is not, the presentation will use the medium logo.
- 11. For the **Title** section, if **Include Logo** and **Include Path** are checked, but **Include Summary** is not, the presentation will use the medium logo.
- 12. For the **Title** section, if **Include Logo** is checked, but **Include Summary** and **Include Path** are not, the presentation will use the small logo.
- 13. For the **Folders & Subscriptions** section, if **Include Logo** and **Include Summary** are checked, the presentation will use the large logo.
- 14. For the **Folders & Subscriptions** section, if **Include Logo** is checked, but **Include Summary** is not, the presentation will use the small logo.
- 15. For the Priority Items section, if Include Logo and Include Summary are checked, the presentation will use the large logo.
- 16. For the Priority Items section, if Include Logo is checked, but Include Summary is not, the presentation will use the small logo.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/06/2002	TAF	Added Options to page listing.
1.10	03/18/2002	TAF	Final mockup for development review and coding. Removed Show Author and Show Dates from Folders & Subscriptions and Priority Items. This is now handled as part of the publication properties.

Printed: 06/12/2018

Last Updated: 07/15/2003

5.6. Portal Management – General – Supporting Pages [Ph1]



General	Description				
HelpID	Portal.General.SupportingPages				
Title	General → Supporting Pages				
Usage	Defines the Presentation properties for the portal home page. This page is read-only if Use theme is selected on the Profile				
Туре	Standard Multi-page DE form				
Open Focus	Help Information – Code				
Tab Order	 Help Information – Lookup Help Information – Open Help Information – Use for all folder summary pages Copyright Statement – Code Copyright Statement – Lookup Copyright Statement – Use for all folder summary pages Disclaimer Statement – Code Disclaimer Statement – Lookup Disclaimer Statement – Lookup Disclaimer Statement – Use for all folder summary pages Contact Information – Code Contact Information – Lookup Contact Information – Lookup Contact Information – Use for all folder summary pages Under Construction – Code Under Construction – Code 				

General	Description
	 17. Under Construction – Lookup 18. Under Construction – Open 19. Under Construction – Use for all folder summary pages 20. Pause* 21. Save* 22. Close* 23. Help Information – Code * Note: These buttons are part of the matter framework. If there tab order is different, that is okay. The tab order of the matter framework is beyond the scope of this FDS.
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.6 Manage Portals – Define Supporting Pages for Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal 12.1.8 Select Portal Supporting Pages
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the portal window. This is part of the matter fra	mework, and is beyond the scope of this specification.	
Contact Information – Lookup	Displays the Select Supporting Page window, prefiltered on contact information-type pages.	Portal.General.SupportingPages.ContactInformation. Lookup	
Contact Information – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.General.SupportingPages.ContactInformation. Open	
Copyright Statement – Lookup	Displays the Select Supporting Page window, prefiltered on copyright-type pages.	Portal.General.SupportingPages.CopyrightStatement .Lookup	
Copyright Statement – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.General.SupportingPages.CopyrightStatement .Open	
Disclaimer Statement – Lookup	Displays the Select Supporting Page window, prefiltered on disclaimer-type pages.	Portal.General.SupportingPages.DisclaimerStatemen t.Lookup	
Disclaimer Statement – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.General.SupportingPages.DisclaimerStatemen t.Open	
Help Information – Lookup	Displays the Select Supporting Page window, prefiltered on help information-type pages.	Portal.General.SupportingPages.HelpInformation.Lookup	
Help Information – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.General.SupportingPages.HelpInformation.Op en	

Buttons	Function / Action	HelpID	Hot Key			
Pause	auses/restarts the time. This is part of the matter framework, and is beyond the scope of this specification.					
Save	saves the portal. This is part of the matter framework, and is beyond the scope of this specification.					
Under Construction – Lookup	Displays the Select Supporting Page window, prefiltered on under construciton-type pages.	Portal.General.SupportingPages.UnderConstruction. Lookup				
Under Construction – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.General.SupportingPages.UnderConstruction. Open				

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contact Information	This is the supporting page for contact information for the home page.	Code – Searches for contact information-type supporting pages by code. Description – Read- only text description of the selected supporting page.	Null	N	N	Portal.General.Supp ortingPages.Contact Information	
Contact Information – Use for all folder summary pages	When checked, the selected Contract Information supporting page will be used for all folder summary pages. The Contact Information field on the Supporting Pages tab of the Folder Properties DE form will be read-only, displaying the Contact Information supporting page selected for the home page.	Checkbox	Null	N	N	Portal.General.Supp ortingPages.Contact Information.Useforal Ifolders	
Copyright Statement	This is the supporting page for copyright information for the home page	Code – Searches for copyright statement-type supporting pages by code. Description – Read- only text description of the selected supporting page.	Null	N	N	Portal.General.Supp ortingPages.Copyrig htStatement	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Copyright Statement – Use for all folder summary pages	When checked, the selected Copyright Statement supporting page will be used for all folder summary pages. The Copyright Statement field on the Supporting Pages tab of the Folder Properties DE form will be read-only, displaying the Copyright Statement supporting page selected for the home page.	Checkbox	Null	N	N	Portal.General.Supp ortingPages.Copyrig htStatement.Usefor allfolders	
Disclaimer Statement	This is the supporting page for disclaimer information for the home page.	Code – Searches for disclaimer statement-type supporting pages by code. Description – Readonly text description of the selected supporting page.	Null	N	N	Portal.General.Supp ortingPages.Disclai merStatement	
Disclaimer Statement – Use for all folder summary pages	When checked, the selected Disclaimer Statement supporting page will be used for all folder summary pages. The Disclaimer Statement field on the Supporting Pages tab of the Folder Properties DE form will be read-only, displaying the Disclaimer Statement supporting page selected for the home page.	Checkbox	Null	N	N	Portal.General.Supp ortingPages.Disclai merStatement.Usef orallfolders	
Help Information	This is the supporting page for help information for the home page.	Code – Searches for help information- type supporting pages by code. Description – Read- only text description of the selected supporting page.	Null	N	N	Portal.General.Supp ortingPages.HelpInf ormation	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Help Information – Use for all folder summary pages	When checked, the selected Help Information supporting page will be used for all folder summary pages.	Checkbox	Null	N	N	Portal.General.Supp ortingPages.HelpInf ormation.Useforallfo Iders	
	The Help Information field on the Supporting Pages tab of the Folder Properties DE form will be read-only, displaying the Help Information supporting page selected for the home page.						
Under Construction	This is the supporting under construction page for the home page.	Code – Searches for under construction-type supporting pages by code. Description – Read- only text description of the selected supporting page.	Null	N	N	Portal.General.Supp ortingPages.UnderC onstruction	
Under Construction – Use for all folder summary pages	When checked, the selected Under Construction supporting page will be used for all folder summary pages. The Under Construction field on the Supporting Pages tab of the Folder Properties DE form will be read-only, displaying the Under Construction supporting page selected for the home page.	Checkbox	Null	N	N	Portal.General.Supp ortingPages.UnderC onstruction.Useforall folders	

Special Rules and Clarifications

^{1.} If **Use for all folder summary pages** is selected, the selected supporting page will be used for all folder summary pages. The corresponding field on the **Supporting Pages** tab of the **Folder Properties** DE form will be read-only, displaying the supporting page selected for the home page.

Printed: 06/12/2018 Last Updated: 07/15/2003

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/01/2002	TAF	Original Mockup
1.01	03/06/2002	TAF	Added Options to page listing.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

Ctrl+V

Ctrl+D

F5

Rename

Filter Clear Filter

Expand Branch Collapse Branch

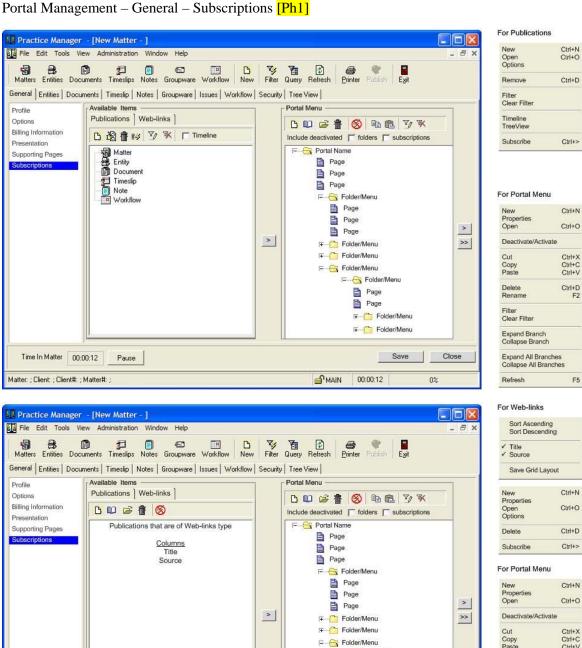
Expand All Branches Collapse All Branches

5.7.

Time In Matter 00:00:12

Matter: ; Client: ; Client#: ; Matter#:

Printed: 06/12/2018



Folder/Menu

Page

Page

Folder/Menu Folder/Menu

Save

Close

General	Description
HelpID	Portal.General.Subscriptions
Title	General → Subscriptions
Usage	Defines the Subscriptions that will appear on the portal.
Туре	Modified 2-panel Assignment Page
Open Focus	Available Items Panel
Tab Order	 Subscribe (>) Portal Menu – Include deactivated folders Portal Menu – Include deactivated subscriptions Portal Menu Unsubscribe (>) Unsubscribe to All (>>) Pause* Save* Close* Help Information – Code * Note: These buttons are part of the matter framework. If there tab order is different, that is okay. The tab order of the matter framework is beyond the scope of this FDS.
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal 6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.3 Manage the Portal Menu – Define Presentation for Folder 6.2.4 Manage the Portal Menu – Define Supporting Pages for Folder 6.2.5 Manage the Portal Menu – Activate/Deactivate Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder 6.2.8 Manage the Portal Menu – Delete Folder 6.2.9 Manage the Portal Menu – Filter the Menu 6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.4 Manage Subscriptions – Delete Subscription
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Available Items – Publications – Toolbar	This is the same as the Related Tree toolbar in the ma beyond the scope of this specification.	tter. The funcitonality of that toolbar and the toolbar but	itons is

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Printed: 06/12/2018

Buttons	Function / Action	HelpID	Hot Key			
Available Items – Web- links – Toolbar		Portal.General.Subscriptions.WebLinks.Toolbar.Activ ate/Deactivate				
– Activate/Deacti vate	(This image shows the button for Deactivate . The button is the same for Activate, only without the red circle with a slash through it. This button is a toggle-type button, as it indicates the action that will occur when selected. If the item is Deactivated, the button should be for Activate. If the item is Activated, the button should be for Deactivate.)					
	If the web-link publication is active, clicking this button deactivates it. If the web-link publication is deactivated, clicking this button activates it.					
Available	+	Portal.General.Subscriptions.WebLinks.Toolbar.Delet				
Items – Web- links – Toolbar	<u>B</u> □ ≥ a ⊗	e				
- Delete (Trash)	If the web-link publication is only assigned to the active portal, this deletes the web-link publication.					
	If the web-link publication is assigned to more than one portal, this unassigns the web-link publication from the portal but leaves the other assignments in tact.					
	The Delete Confirmation dialog box appears, asking the user to confirm that they want to delete it (Yes) or keep the item (N).					
Available Items – Web-	↓	Portal.General.Subscriptions.WebLinks.Toolbar.New				
links – Toolbar						
– New	Creates a new web-link publication, and displays the Publication Properties window for web-links.					
Available Items – Web- links – Toolbar		Portal.General.Subscriptions.WebLinks.Toolbar.Ope n				
– Open	Opens the source for the web-link publication. This button is only active if a web-link publication is selected.					
Available Items – Web- links – Toolbar		Portal.General.Subscriptions.WebLinks.Toolbar.Properties				
- Properties	Displays the Publication Properties window for the web-link publication.					
	This is the same behavior as double-clicking on a web-link publication.					
Close	Closes the portal window. This is part of the matter fra	mework, and is beyond the scope of this specification.				
Pause	Pauses/restarts the time. This is part of the matter fram	nework, and is beyond the scope of this specification.				

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Buttons	Function / Action	HelpID	Hot Key
Portal Menu – Toolbar – Activate/Deacti vate	(This image shows the buttom for Deactivate. The button is the same for Activate, only without the red circle with a slash through it. This button is a toggle-type button, as it indicates the action that will occur when selected. If the item is deactivated, the button should be for Activate. If the item is activated, the button should be for Deactivate.) If the subscription or folder is active, clicking this button deactivates it. If the subscription or folder is deactivated, clicking this button activates it. If the item is an active folder, a dialog box appears advising the user that deactivating a folder not only prevents it from appearing on the portal, but also any subfolders or subscriptions within that folder.	Portal.General.Subscriptions.Menu.Toolbar.Activate/Deactivate	
Portal Menu – Toolbar – Clear Filter	Clears any filtering criteria that has been applied to the portal menu.	Portal.General.Subscriptions.Menu.Toolbar.ClearFilte	
Portal Menu – Toolbar – Copy	Copies the selected folder or subscription to the clipboard. If the item is a folder, the copy action copies not only the folder, but also any subfolders or subscriptions with that folder.	Portal.General.Subscriptions.Menu.Toolbar.Copy	
Portal Menu – Toolbar – Delete (Trash)	Deletes the folder or subscription from the portal menu. If the selection is a subscription, the Delete Confirmation dialog box appears, asking the user to confirm that they want to delete it (Yes) or keep the item (N). If the selection is a folder, the Delete Confirmation dialog box appears, advising the user that the folder and all subfolders and subscriptions within that folder will be deleted, and asks the user to confirm that they want to delete the folder (Yes) or keep it (N).	Portal.General.Subscriptions.Menu.Toolbar.Delete	

Buttons	Function / Action	HelpID	Hot Key
Portal Menu – Toolbar – Filter	Displays the Portal Menu Filter, allowing the user to filter the portal menu by folder and/or subscriptions properties.	Portal.General.Subscriptions.Menu.Toolbar.Filter	
Portal Menu – Toolbar – New	Creates a new folder within the active folder, and displays the Folder Properties window.	Portal.General.Subscriptions.Menu.Toolbar.New	
Portal Menu – Toolbar – Open	Displays the item. This button is only active if a subscription is selected.	Portal.General.Subscriptions.Menu.Toolbar.Open	
Portal Menu – Toolbar – Paste	Pastes the last copied folder or subscription into the active folder. If the copied item is a folder, the paste action pastes not only the folder, but also any subfolders or subscriptions with that folder.	Portal.General.Subscriptions.Menu.Toolbar.Paste	
Portal Menu – Toolbar – Properties	Displays the Folder Properties or Subscription Properties window, depending on which item is selected on the Portal Menu. This is the same behavior as double-clicking on a folder or item.	Portal.General.Subscriptions.Menu.Toolbar.Propertie s	
Save	Saves the portal. This is part of the matter framework,	and is beyond the scope of this specification.	
Subscribe (>)	Subscribes to the selected Available Items. If the item is a tree branch, then the Auto- Subscription Properties window appears. If the item is not a tree branch (i.e., a data record), the Subscription Properties window appears. The items will be contains within the active folder on the Portal Menu.	Portal.General.Subscriptions.Subscribe	

Buttons	Function / Action	HelpID	Hot Key
Unsubscribe (>)	Removes the selected subscriptions from the Portal Menu , displaying a dialog box that allows the user to continue removing the selected subscriptions (Yes), or keeping the selected subscriptions (No).	Portal.General.Subscriptions.Unsubscribe	
	Only active after one or more subscriptions are selected.		
	If a folder is selected, clicking Unsubscribe does not impact the contents of the folder, only selected subscriptions.		
Unsubscribe All (>>)	Removes all subscriptions from within the selected branch of the the Portal Menu , including autosubscriptions, leaving only the folder menu structure.	Portal.General.Subscriptions.UnsubscribeAll	
	Only active if a folder is selected.		
	If the top portal folder is selected, this removes all subscriptions from the portal, leaving only the folder menu structure.		
	A dialog box first appears, advising the user that clicking Unsubscribe AII will remove all subscriptions from within the selected folders, or the entire portal if the portal folder is selected, giving the user the option of continuing to remove the subscriptions (Yes) or keeping the subscriptions (No).		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Items	These are items that are available for subscribing to on the portal that are currently not included in the active folder. If no folder is active, then this is all items.	Varies by selection	n/a	n/a	n/a	Portal.General.Subs criptions.AvailableIt ems	
Available Items – Portal Applcaitions	These are portal- specific applcations created through Portal Settings. When this option is selected, the Available Items panel contains a 3-column grid that lists the Web Apps and Link Code, Description and Command Line. That list has right-click functionality for both the column headings and grid.	Option in a Set of 2	Null	n/a	n/a	Portal.General.Subs criptions.AvailableIt ems.PortalApplcaitio ns	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Items – Publications	These are items that have been created for or related to the portal matter that are currently not included in the active folder.	Option in a Set of 2	Yes	n/a	n/a	Portal.General.Subs criptions.AvailableIt ems.Publications	
	If no folder is active, then this is all publications.						
	When selected, the matter Tree View appears in this panel, with all the same functionality as that of the Tree View tab.						
Include deactivated publications	When checked, includes publications that have been deactivated, or have had their publishing periods either expire or not go into effect.	Checkbox	Null			Portal.General.Subs criptions.Includedea ctivatedpublications	
Portal Menu	These are the folders and subscriptions that have been subscribed to and may appear on the portal. Items are represented as folders or pages.	TreeView assignment window.	Active items with an Active From date less than or equal to today, and an Active To date equal to or greater than today, or null.	n/a	n/a	Portal.General.Subs criptions.Menu	
Portal Menu – Include deactivated subscriptions	When checked, includes all subscriptions that have been deactivated.	Checkbox	Null	n/a	n/a	Portal.General.Subs criptions.PortalMenu .IncludeDeactivated Subse	
Portal Menu – Include deactivated folders	When checked, includes all folders that have been deactivated.	Checkbox	Null	n/a	n/a	Portal.General.Subs criptions.PortalMenu .IncludeDeactivated Folders	

Special Rules and Clarifications

- 1. The tree view component for **Available Items** is the same as the one found under the **TreeView** matter tab, and is therefore beyond the scope of this specification.
- 2. When an item is subscribed to, it is assigned to the portal menu in the active folder, and it removed from the **Available Items** list just for that folder. If the user was to click on another folder, the item would return.
- 3. The **Portal Menu** should support drag'n'drop within the tree, as well as expanding and collapsing of branches. The user should be able to rename an item without opening it.
- 4. The interface should support drag'n'drop from the **Available Items** to the **Portal Menu** panels, and display the same dialog boxes as if the user clicked **Subscribe** (>). Drag'n'Drop in the other direction is not necessary.
- 5. The interface should support drag'n'drop from the **Portal Menu** panel. Dragging an item off of the **Portal Menu** is the same as deleting the item, and should display the same dialog boxes.

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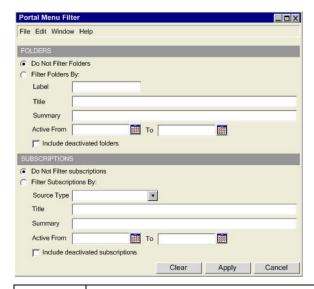
Special Rules and Clarifications

- 6. If the user elects to Include deactivated publications and then selects one, an error message appears advising them that the publication period for the item has expired and can no longer be subscribed to. The user could then go through the Publication Properties DE form, and update the publication period, keeping in mind that publication periods are for all published-to portals, not just the active one.
- 7. When subscribing to a publication, compare the Publish From date with the Active From date. If the Active From date is earlier than the Publish From date, display a warning that advises the user of this condition, and give them the option of synchronizing the Active From date with the Publish From date (Yes), or keeping the Active From date (No) with the understanding that the item will not appear on the portal Web page until both the Publish From and Active From dates have been reached. Note that this synchronizing only copies the date, it does not link the Publish From and Active From dates for future updates.
- 3. When subscribing to a publication, compare the **Publish To** date with the **Active To** date. If the **Active To** date is later then the **Publish To** date, display a warning that advises the user of this condition, and give them the option of synchronizing the **Active To** date with the **Publish To** date (Yes), or keeping the **Active To** date (No) with the understanding that the item will cease to appear on the portal Web page once either the **Publish To** and **Active To** date has been reached, whichever comes first. Note that this synchronizing only copies the date, it does not link the **Publish To** and **Active To** dates for future updates.
- When subscribing to publication, check the Publish From, Publish To and Deactivated fields. If the item is not available for subscribing, display a message advising the user of this condition.
- 10. If **All publications are automatically assigned to new portals** is selected on the **Portal Settings General** page, then all publications, as they are added, are assigned to the portal and are available for subscription.
- 11. If All publications are automatically assigned to new portals and/or New publications are automatically assigned to all active portals is selected on the Portal Settings General page, then the list of available publications is all item published in Practice Manage, except those specifically excluded from the portal.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/01/2002	TAF	Original Mockup
1.01	03/05/2002	TAF	Added additional rules for subscription validation.
1.02	03/06/2002	TAF	Added Options to page listing.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

5.8. Portal Management – General – Subscriptions – Portal Menu Filter [Ph3]



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General	Description			
HelpID	Portal.General.Subscriptions.MenuFilter			
Title	Portal Menu Filter			
Usage	Allows the user to apply a filter to the portal Portal Menu on the Subscriptions page using folder and/or subscription criteria.			
Туре	Modal Dialog			
Open Focus	Do Not Filter Folders			
Tab Order	 Filter Folders By Filter Folders By – Label Filter Folders By – Title Filter Folders By – Summary Filter Folders By – Active From Filter Folders By – Active From – Lookup Filter Folders By – Active To Filter Folders By – Active To – Lookup Included deactived folders Do Not Filter Subscriptions Filter Subscriptions By – Title Filter Subscriptions By – Active From Filter Subscriptions By – Active From Filter Subscriptions By – Active From – Lookup Filter Subscriptions By – Active To Filter Subscriptions By – Active To Filter Subscriptions By – Active To Filter Subscriptions By – Active To – Lookup Included deactived subscriptions Clear Apply Cancel 			
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal			

General	Description
	6.1.8 Manage Portals – Close Portal 6.2 Manage the Portal Menu Use Cases 6.2.9 Manage the Portal Menu – Filter the Menu
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Portal Menu Filter window and applies the filter criteria to the Portal Menu . If there is no criteria in the fields, clicking Apply clears the existing filter.	Portal.General.Subscriptions.MenuFilter.Apply	
Clear	Clears the filter criteria from the Portal Menu Filter fields.	Portal.General.Subscriptions.MenuFilter.Clear	
Close	Closes the Portal Menu Filter window without modifying the Portal Menu .	Portal.General.Subscriptions.MenuFilter.Close	
Filter Subscriptions By – Active From – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Subscriptions.MenuFilter.FilterSubscriptionsBy.ActiveFrom.Lookup	
Filter Subscriptions By – Active To – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Subscriptions.MenuFilter.FilterSubscriptionsBy.ActiveTo.Lookup	
Filter Folders By – Active From – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Subscriptions.MenuFilter.FilterFolders By.ActiveFrom.Lookup	
Filter Folders By – Active To – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.General.Subscriptions.MenuFilter.FilterFolders By.ActiveTo.Lookup	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Do Not Filter Content	When selected, the subscription filter fields are disabled. The subscriptions will not be filtered.	Option in a set of 2	Yes	n/a	n/a	Portal.General.Subs criptions.MenuFilter. DoNotFilterContent	
Do Not Filter Folders	When selected, the folder filter fields are disabled. The folders will not be filtered.	Option in a set of 2	Yes	n/a	n/a	Portal.General.Subs criptions.MenuFilter. DoNotFilterFolders	
Filter Folders By	When selected, the folder filter fields are enabled.	Option in a set of 2	No	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterFoldersBy	
Filter Folders By –	This filters the Portal	Text	Null	n/a	n/a	Portal.General.Subs	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From	Menu by only showing those folders with an Active From date greater than or equal to the date entered in this filter field.					criptions.MenuFilter. FilterFoldersBy.Acti veFrom	
Filter Folders By – Active To	This filters the Portal Menu by only showing those folders with an Active To date less than or equal to the date entered in this filter field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterFoldersBy.Acti veTo	
Filter Folders By – Label	This filters the Portal Menu by values in the folder Label field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterFoldersBy.Lab el	
Filter Folders By – Summary	This filters the Portal Menu by values in the folder Summary field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterFoldersBy.Sum mary	
Filter Folders By – Title	This filters the Portal Menu by values in the folder Title field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterFoldersBy.Title	
Filter Subscriptions By	When selected, the subscription filter fields are enabled.	Option in a set of 2	Мо	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterContentBy	
Filter Subscriptions By – Active From	This filters the Portal Menu by only showing those subscriptions with an Active From date greater than or equal to the date entered in this filter field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterContentBy.Acti veFrom	
Filter Subscriptions By – Active To	This filters the Portal Menu by only showing those subscriptions with an Active To date less than or equal to the date entered in this filter field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterContentBy.Acti veTo	
Filter Subscriptions By – Include deactived folders	When selected, the portal menu includes deactivated folders.	Checkbox	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterFoldersBy.Inclu deDeactivated	
Filter Subscriptions By – Include deactived subscriptions	When selected, the portal menu includes deactivated subscriptions.	Checkbox	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterContentBy.Incl udeDeactivated	

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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Filter Subscriptions By – Source Type	This is the list of available source types on which to filter subscriptions.	Drop-down List: Documents Entities Matters Notes Timeslips Web-links Workflow	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterContentBy.Sou rce	
Filter Subscriptions By – Summary	This filters the Portal Menu by values in the subscription Summary field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterContentBy.Su mmary	
Filter Subscriptions By – Title	This filters the Portal Menu by values in the subscription Title field.	Text	Null	n/a	n/a	Portal.General.Subs criptions.MenuFilter. FilterContentBy.Title	

Special Rules and Clarifications

1. When the Portal Menu Filter window opens, any existing filter criteria populates the fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/01/2002	TAF	Original Mockup.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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5.9. Portal Management – General – Subscriptions – Warning – Publication Not Active [Ph1]



General	Description
HelpID	Portal.General.Subscriptions.PublicationNotActive
Title	Warning – Publication Not Active
Usage	Advises the user that the selected publication is not active.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

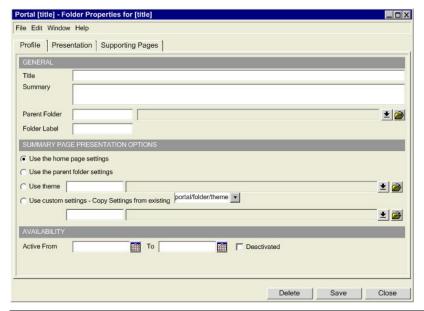
Buttons	Function / Action	HelpID	Hot Key
ОК	Closes the warning dialog box.	Portal.General.Subscriptions.PublicationNotActive.O	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/05/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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Last Updated: 07/15/2003

5.10. Portal Management – Folder Properties – Profile [Ph1]



General	Description				
HelpID	Portal.FolderProperties.Profile				
Title	Portal [title] \rightarrow Folder Properties for [title] \rightarrow Profile				
Usage	Defines the folder profile information.				
Туре	Multi-page DE form				
Open Focus	Title				
Tab Order	 Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Folder Label Use the portal home page settings Use the parent folder page settings Use theme Use theme – Code Use theme – Lookup Use custom settings Copy settings from existing Copy settings from existing – Code Copy settings from existing – Lookup Active From Active From – Lookup Active To – Lookup Deactivated Delete 				

General	Description
	23. Save 24. Close 25. Title
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.5 Manage the Portal Menu – Activate/Deactivate Folder 6.2.2 Manage the Portal Menu – Modify Folder 12.1.2 Select Portal Folder 12.1.1 Select Portal 12.1.9 Select Portal Theme
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.FolderProperties.Profile.ActiveFrom.Lookup	
Active To – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.FolderProperties.Profile.ActiveTo.Lookup	
Close	This closes the Folder Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Folder Properties window (Cancel).	Portal.FolderProperties.Close	
Copy settings from existing – Lookup	If Portal is selected in the Copy settings from existing field, this displays the Select Portal window. If Theme is selected in the Copy settings from existing field, this displays the Select Theme window. If Folder is selected in the Copy settings from existing field, this displays the Select Portal Folders window.	Portal.FolderProperties.Profile.portal_theme_folder.L ookup	
Copy settings from existing – Open	If Portal is selected in the Copy settings from existing field, this opens the Portal Properties window for the selected portal. If Theme is selected in the Copy settings from existing field, , this opens the Theme Properties window for the selected theme. If Theme is selected in the Copy settings from existing field, this opens the Folder Properties window for the selected folder.	Portal.FolderProperties.Profile.portal_theme_folder.O pen	

Buttons	Function / Action	HelpID	Hot Key
Delete	Deletes the active folder.	Portal.FolderProperties.Delete	
	Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No).		
	If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal.		
	If the user chooses No , the record is not deleted, and the user returns to the Folder Properties window.		
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.FolderProperties.Profile.ParentFolder.Lookup	
Parent Folder – Open	Opens the Folder Properties window for the selected folder.	Portal.FolderProperties.Profile.ParentFolder.Open	
Save	This saves the Folder Properties record. The window remains open.	Portal.FolderProperties.Save	
Use theme – Lookup	Displays the Select Theme window.	Portal.FolderProperties.Profile.Usetheme.Lookup	
Use theme – Open	Opens the Theme Properties window for the selected theme.	Portal.FolderProperties.Profile.Usetheme.Open	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From	This is the date from which the folder will be active and can be presented. This field must be populated with a value in order to present the folder and its contents. It is not, however, required in the database as the user may want to enter a date at a later time. Technically speaking, if there is no Active From date, the folder is deactivated.		The default value in this field is determined by the selection on the Portal Settings – General – Folders tab. It is either today's date or blank.	N	N	Portal.FolderPropert ies.Profile.ActiveFro m	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To	This is the date through which the folder will be active and can be presented. If null, there is no expiration date on the folder.	Date	The default value in this field is determined by the selection on the Portal Settings – General – Folders tab. It is either the results of adding a predefined number of days to the Active From date, or it is blank.	N	N	Portal.FolderPropert ies.Profile.ActiveTo	
Copy settings from existing	Allows the presentation values from an existing portal, theme or folder to be copied to the active folder.	Drop-down List: Portal Theme Folder	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	n/a	n/a	Portal.FolderPropert ies.Profile.Copysetti ngsfromexisting	
Copy settings from existing – Code	This is the code of the source portal, theme or folder for custom settings.	Code – Searches for portal, theme or folder (based on selection in the Copy settings from existing field) based on code.	Null	Y* if Copy- ing	Y* if Copy- ing	Portal.FolderPropert ies.Profile.Copysetti ngsfromexisting.Cod e	
Copy settings from existing – Description	This is the description of the source portal, theme or folder for custom settings.	Read-only text.	Null	Y* if Copy- ing	Y* if Copy- ing	Portal.FolderPropert ies.Profile.Copysetti ngsfromexisting.Des cription	
Deactivated	If selected, the folder and its contents, including subfolders, cannot be presented, even of the Active From date has not passed.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field is not checked by default.	N	N	Portal.FolderPropert ies.Profile.Deactivat ed	
Folder Label	This is the label for the folder as it will apear on the menu. Note that folder labels must be unique within a folder, including the top folder level, but do not have to be unique for the entire portal.	Code	Null	Y	Y	Portal.FolderPropert ies.Profile.FolderLa bel	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Parent Folder	This is the parent folder of the active folder, in which the active folder will appear on the portal. If this field is null, the folder appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	Null	N	N	Portal.General.Profil e.Usetheme.Parent Folder	
Summary	This is a summary of the folder. Through presentation options, this summary can appear below the title on the summary page, as well as the folder item on the parent folder summary page.	Text	Null	N	N	Portal.FolderPropert ies.Profile.Summary	
Title	This is the title of the folder. It appears in the title area on the home page.	Text	Null	Υ	Υ	Portal.FolderPropert ies.Profile.Title	
Use custom settings	Allows the portal home page to use custom presentation settings.	Option – In the Summary Page Pressentation Options section	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y – Opt 1 of 4	Y – Opt 1 of 4	Portal.FolderPropert ies.Profile.Usecusto msettings	
Use the home page settings	When selected, uses the home page presentation settings for the summary page. The folder's Presentation page is read-only, and displays the values from the home page Presentation page.	Option – In the Summary Page Pressentation Options section	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y – Opt 1 of 4	Y – Opt 1 of 4	Portal.FolderPropert ies.Profile.Usetheho mepagesettings	

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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the parent folder settings	When selected, uses the parent folder presentation settings for the summary page.	Option – In the Summary Page Pressentation Options section	No	Y – Opt 1 of 4	Y – Opt 1 of 4	Portal.FolderPropert ies.Profile.Usethepa rentfoldersettings	
	The folder's Presentation page is read-only, and displays the values from the parent folder Presentation page.						
	This option is disabled if the Parent Folder field is null.						
Use theme	Uses a specific theme for the portal home page that can not be edited.	Option – In the Summary Page Pressentation Options section	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y – Opt 1 of 4	Y – Opt 1 of 4	Portal.FolderPropert ies.Profile.Usethem e	
Use theme – Theme	This is the Code and Description of the selected theme. Active only if Use them is selected.	Code – Searches for themes based on code. Description – Read- only text description of the selected theme.	Null	Y – if Use theme = Y	Y – if Use theme = Y	Portal.General.Profil e.Usetheme.Theme	

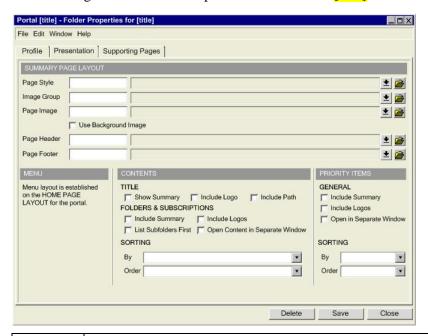
Special Rules and Clarifications

1. If All summary pages use home page presentation settings is selected on the Portal – General page, Use the home page settings is automatically selected, and Use theme and Use custom settings are disabled. The Presentation page will be read-only.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	03/02/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

Printed: 06/12/2018 Last Updated: 07/15/2003

5.11. Portal Management – Folder Properties – Presentation [Ph1]



General	Description						
HelpID	ortal.FolderProperties.Presentation						
Title	ortal [title] \rightarrow Folder Properties for [title] \rightarrow Presentation						
Usage	Defines the Presentation properties for the folder summary page.						
	This page is read-only under the following conditions:						
	2. Use theme is selected on the Profile – the values displayed are those from the theme						
	3. Use the home page settings is selected on the Profile – the values displayed are those from the home page						
	4. Use the parent folder settings is selected on the Profile – the values displayed are those from the parent folder						
Туре	Standard Multi-page DE form						
Open Focus	Page Style – Code						
Tab Order	1. Page Style – Lookup						
	2. Page Style – Open						
	3. Image Group – Code						
	4. Image Group – Lookup						
	5. Image Group – Open						
	6. Page Image – Code						
	7. Page Image – Lookup						
	8. Page Image – Open						
	9. Use Background Image						
	10. Page Header – Code						
	11. Page Header – Lookup12. Page Header – Open						
	13. Page Footer – Code						
	14. Page Footer – Lookup						
	15. Page Footer – Open						
	16. Contents – Title – Include Summary						

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Last Updated: 07/15/2003

General	Description
	17. Contents – Title – Include Logo 18. Contents – Title – Include Path 19. Contents – Folders & Subscriptions – Include Summary 20. Contents – Folders & Subscriptions – Show Author 21. Contents – Folders & Subscriptions – Show Dates 22. Contents – Folders & Subscriptions – Include Logos 23. Contents – Folders & Subscriptions – List Folders First 24. Contents – Folders & Subscriptions – Open Content in Separate Window 25. Contents – Sorting – By 26. Contents – Sorting – Order 27. Priority Items – Include Summary 28. Priority Items – Include Logos 29. Priority Items – Open in Separate Window 30. Priority Items – Sorting – By 31. Priority Items – Sorting – Order 32. Delete 33. Save 34. Close 35. Page Style – Code
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.3 Manage the Portal Menu – Define Presentation for Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder 12.1.3 Select Portal Footer 12.1.4 Select Portal Header 12.1.5 Select Portal Image 12.1.6 Select Portal Image Group 12.1.7 Select Portal Style 12.1.9 Select Portal Theme
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Close	This closes the Folder Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Folder Properties window (Cancel).	Portal.FolderProperties.Close	
Delete	Deletes the active folder. Upon clicking Delete, a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No).	Portal.FolderProperties.Delete	
	If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Folder Properties window.		
Image Group – Lookup	Displays the Select Portal Image Groups window.	Portal.FolderProperties.Presentation.ImageGroup.Lo okup	

Buttons	Function / Action	HelpID	Hot Key
Image Group – Open	Opens the Image Group Properties window for the selected image group.	Portal.FolderProperties.Presentation.ImageGroup.Op en	
Page Footer – Lookup	Displays the Select Portal Footer window.	Portal.FolderProperties.Presentation.PageFooter.Loo kup	
Page Footer – Open	Opens the Footer Properties window for the selected footer.	Portal.FolderProperties.Presentation.PageFooter.Op en	
Page Header – Lookup	Displays the Select Portal Headers window.	Portal.FolderProperties.Presentation.PageHeader.Lo okup	
Page Header – Open	Opens the Header Properties window for the selected header.	Portal.FolderProperties.Presentation.PageHeader.Op en	
Page Image – Lookup	Displays the Select Portal Images window.	Portal.FolderProperties.Presentation.PageImage.Loo kup	
Page Image – Open	Opens the Image Properties window for the selected page image.	Portal.FolderProperties.Presentation.PageImage.Ope n	
Page Style – Lookup	Displays the Select Style window.	Portal.FolderProperties.Presentation.PageStyle.Look up	
Page Style – Open	Opens the Style Properties window for the selected style.	Portal.FolderProperties.Presentation.PageStyle.Open	
Save	This saves the Folder Properties record. The window remains open.	Portal.FolderProperties.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Folders & Subscriptions – Include Logos	When checked, a logo will appear next to each folder and subscription on the summary page. If not checked, the logo will not display, even if it exists in the supporting data record	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Υ	Portal.FolderPropert ies.Presentation.Co ntents.Folders_Sub s.IncludeLogos	
Contents – Folders & Subscriptions – Include Summary	When checked, summary text, if available, will appear below each folder and subscription on the summary page. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Υ	Y	Portal.FolderPropert ies.Presentation.Co ntents.Folders_Sub s.ShowSummary	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Folders & Subscriptions – List Subfolders First	When checked, subfolders will be listed first on the summary page, followed by subscriptions.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Υ	Y	Portal.FolderPropert ies.Presentation.Co ntents.Folders_Sub s.ListFoldersFirst	
Contents – Folders & Subscriptions – Open Content in Separate Window	When checked, subscriptions on the summary page will open in a separate window. If this item is not checked, subscriptions will open in the main content window.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Υ	Υ	Portal.FolderPropert ies.Presentation.Co ntents.Folders_Sub s.OpenContentinSe parateWindow	
Contents – Sorting – By	Indicates how folders and subscriptions on the summary page will be sorted. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: None Alphanumeric Chronological	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or None.	Y	Y	Portal.FolderPropert ies.Presentation.Co ntents.Sorting.By	
Contents – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for folders and subscriptions on the summary page. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: Ascending Descending	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or Ascending if By is either Alphanumeric or Chronological.	Y – If "By" is not None.	Y – If "By" is not None.	Portal.FolderPropert ies.Presentation.Co ntents.Sorting.Order	
Contents – Title – Include Logo	When checked, the logo will appear next to the title on the summary page. If not checked, the logo will not appear.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Co ntents.Title.IncludeL ogo	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Title – Include Path	When checked, the path to the current page will appear below the title on the summary page using the Code value. Each level is a link back up the path. If not checked, the path will not appear.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Co ntents.Title.IncludeP ath	
Contents – Title – Include Summary	When checked, summary text, if available, will appear below the title on the summary page. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Co ntents.Title.ShowSu mmary	
Image	This is the image to use for the folder.	Code – Searches for images by code. Description – Read- only text description of the selected image.	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Υ	Y	Portal.FolderPropert ies.Presentation.Ima ge	
Image Group	This is the image group to use for the summary page.	Code – Searches for image groups by code. Description – Read- only text description of the selected image group.	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Υ	Portal.FolderPropert ies.Presentation.Ima geGroup	
Page Footer	This is the footer to use for the summary page.	Code – Searches for footers by code. Description – Read- only text description of the selected footer.	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Υ	Y	Portal.FolderPropert ies.Presentation.Pa geFooter	
Page Header	This is the header to use on the summary page.	Code – Searches for headers by code. Description – Read- only text description of the selected header.	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Pa geHeader	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Image	This is the default image to use for the summary page.	Code – Searches for images by code. Description – Read- only text description of the selected image.	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Pa gelmage	
Page Style	This is the style to use for the summary page.	Code – Searches for styles by code. Description – Read- only text description of the selected style.	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Pa geStyle	
Priority Items – General – Include Logos	When checked, a logo will appear next to each priority item on the summary page. If not checked, the logo will not display, even if it exists in the supporting data record	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Υ	Portal.FolderPropert ies.Presentation.Pri orityItems.General.I ncludeLogos	
Priority Items – General – Include Summary	When checked, summary text, if available, will appear below each priority item on the summary page. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Pri orityItems.General.S howSummary	
Priority Items – General – Open in Separate Window	When checked, priority items on the summary page will open in a separate window. If this item is not checked, the priority item will open in the main content window.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Y	Y	Portal.FolderPropert ies.Presentation.Pri orityItems.General. OpeninSeparateWin dow	
Priority Items – Sorting – By	Indicates how priority items on the summary page will be sorted.	Drop-down List: None Alphanumeric Chronological	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or None.	Y	Y	Portal.FolderPropert ies.Presentation.Pri orityItems.Sorting.B y	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Priority Items – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for priority items on the summary page.	Drop-down List: Ascending Descending	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or Ascending if By is either Alphanumeric or Chronological.	Y – If "By" is not None.		Portal.FolderPropert ies.Presentation.Pri orityItems.Sorting.O rder	
Use Background Image	Indicates the backrgound from the selected image will appears on the summary page.	Checkbox	The default is based on the selection in the Summary Page Presentation Options on the Profile tab of the folder, or null.	Υ	Y	Portal.FolderPropert ies.Presentation.Us erBackgroundImage	

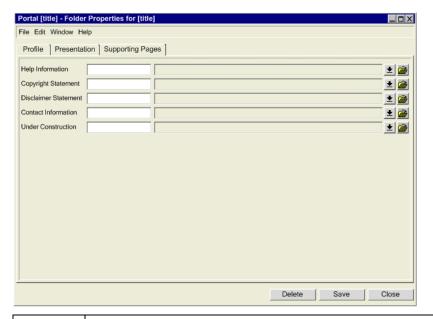
Special Rules and Clarifications

- 1. If **Use theme** is selected on the **Profile**, this page is read-only and displays the presentation values from the selected theme.
- If Use the home page settings is selected on the Profile, this page is read-only and displays the presentation values from the home page.
- 3. If **Use the parent folders** is selected on the **Profile**, this page is read-only and displays the presentation values from the selected parent folder.
- 4. If Use custom settings is selected on the Profile, this page can be edited.
- 5. If **Copy settings from existing** is selected on the **Profile**, the fields on this form are pre-populated with the presentation values from the selected portal, theme or folder.
- 6. For the Title section, if Include Logo, Include Summary, and Include Path are checked, the presentation will use the large logo.
- For the Title section, if Include Logo and Include Summary are checked, but Include Path is not, the presentation will use the medium logo.
- 8. For the **Title** section, if **Include Logo** and **Include Path** are checked, but **Include Summary** is not, the presentation will use the medium logo.
- For the Title section, if Include Logo is checked, but Include Summary and Include Path are not, the presentation will use the small logo.
- 10. For the **Folders & Subscriptions** section, if **Include Logo** and **Include Summary** are checked, the presentation will use the large logo.
- 11. For the **Folders & Subscriptions** section, if **Include Logo** is checked, but **Include Summary** is not, the presentation will use the small logo.
- 12. For the Priority Items section, if Include Logo and Include Summary are checked, the presentation will use the large logo.
- 13. For the **Priority Items** section, if **Include Logo** is checked, but **Include Summary** is not, the presentation will use the small logo.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding. Removed Show Author and Show Dates from Folders & Subscriptions and Priority Items. This is now handled as part of the publication properties.

Last Updated: 07/15/2003

5.12. Portal Management – Folder Properties – Supporting Pages [Ph1]



General	Description
HelpID	Portal.FolderProperties.SupportingPages
Title	Portal [title] → Folder [title] Properties → Supporting Pages
Usage	Defines the Presentation properties for the portal home page.
	This page is read-only if Use theme is selected on the Profile
Туре	Standard Multi-page DE form
Open Focus	Help Information – Code
Tab Order	 Help Information – Lookup Help Information – Open Copyright Statement – Code Copyright Statement – Lookup Copyright Statement – Open Disclaimer Statement – Lookup Disclaimer Statement – Open Contact Information – Code Contact Information – Lookup Contact Information – Doen Under Construction – Code Under Construction – Code Under Construction – Open Delete Save Close Help Information – Code
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder

General	Description
	6.2.4 Manage the Portal Menu – Define Supporting Pages for Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder 12.1.8 Select Portal Supporting Pages
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Close	This closes the Folder Properties window. Upon Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Folder Properties window (Cancel).	Portal.FolderProperties.Close	
Contact Information – Lookup	Displays the Select Supporting Page window, prefiltered on contact information-type pages. If Use for all folder summary pages for a Contact Information is selected on the Portal – Suporting Pages DE page, this button is disabled.	Portal.FolderProperties.SupportingPages.ContactInformation.Lookup	
Contact Information – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.FolderProperties.SupportingPages.ContactInformation.Open	
Copyright Statement – Lookup	Displays the Select Supporting Page window, prefiltered on copyright-type pages. If Use for all folder summary pages for a Copyright Statement is selected on the Portal – Suporting Pages DE page, this button is disabled.	Portal.FolderProperties.SupportingPages.CopyrightSt atement.Lookup	
Copyright Statement – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.FolderProperties.SupportingPages.CopyrightSt atement.Open	
Delete	Deletes the active folder. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Folder Properties window.	Portal.FolderProperties.Delete	
Disclaimer Statement – Lookup	Displays the Select Supporting Page window, prefiltered on disclaimer-type pages. If Use for all folder summary pages for a Disclaimer Statement is selected on the Portal – Suporting Pages DE page, this button is disabled.	Portal.FolderProperties.SupportingPages.Disclaimer Statement.Lookup	
Disclaimer Statement – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.FolderProperties.SupportingPages.Disclaimer Statement.Open	

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Buttons	Function / Action	HelpID	Hot Key
Help Information – Lookup	Displays the Select Supporting Page window, prefiltered on help information-type pages. If Use for all folder summary pages for a Help Information is selected on the Portal – Suporting Pages DE page, this button is disabled.	Portal.FolderProperties.SupportingPages.HelpInform ation.Lookup	
Help Information – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.FolderProperties.SupportingPages.HelpInform ation.Open	
Save	This saves the Folder Properties record. The window remains open.	Portal.FolderProperties.Save	
Under Construction – Lookup	Displays the Select Supporting Page window, prefiltered on under construction-type pages. If Use for all folder summary pages for a Under Construction is selected on the Portal – Suporting Pages DE page, this button is disabled.	Portal.FolderProperties.SupportingPages.UnderCons truction.Lookup	
Under Construction – Open	Opens the Supporting Page Properties window for the selected supporting page.	Portal.FolderProperties.SupportingPages.UnderConstruction.Open	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contact Information	This is the supporting page for contact information for the home page.	Code – Searches for contact information-type supporting pages by code. Description – Read- only text description of the selected supporting page.	Null If Use for all folder summary pages for a Contact Information is selected on the Portal – Suporting Pages DE page, this field is populated with that selection and is read-only.	N	N	Portal.FolderPropert ies.SupportingPage s.ContactInformatio n	
Copyright Statement	This is the supporting page for copyright information for the home page	Code – Searches for copyright statement-type supporting pages by code. Description – Read- only text description of the selected supporting page.	Null If Use for all folder summary pages for a Copyright Statement is selected on the Portal – Suporting Pages DE page, this field is populated with that selection and is read-only.	N	N	Portal.FolderPropert ies.SupportingPage s.CopyrightStateme nt	

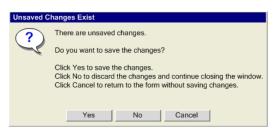
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Disclaimer Statement	This is the supporting page for disclaimer information for the home page.	Code – Searches for disclaimer statement-type supporting pages by code. Description – Readonly text description of the selected supporting page.	Null If Use for all folder summary pages for a Disclaimer Statement is selected on the Portal – Suporting Pages DE page, this field is populated with that selection and is read-only.	N	N	Portal.FolderPropert ies.SupportingPage s.DisclaimerStatem ent	
Help Information	This is the supporting page for help information for the home page.	Code – Searches for help information- type supporting pages by code. Description – Read- only text description of the selected supporting page.	Null If Use for all folder summary pages for a Help Information is selected on the Portal – Suporting Pages DE page, this field is populated with that selection and is read-only.	N	N	Portal.FolderPropert ies.SupportingPage s.HelpInformation	
Under Construction	This is the supporting under construction page for the home page.	Code – Searches for under construction-type supporting pages by code. Description – Readonly text description of the selected supporting page.	Null If Use for all folder summary pages for a Under Construction is selected on the Portal – Suporting Pages DE page, this field is populated with that selection and is read-only.	N	N	Portal.FolderPropert ies.SupportingPage s.UnderConstruction	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description				
1.00	03/02/2002	TAF	Original Mockup				
1.10	03/18/2002	TAF	Final mockup for development review and coding.				

Last Updated: 07/15/2003

5.13. Portal Management – Folder Properties – Unsaved Changes Exist [Ph1]



General	Description
HelpID	Portal.FolderProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on one or more of the Folder Properties pages.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Cancel 3. Yes
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Folder Properties window without saving or discarding the changes.	Portal.FolderProperties.UnsavedChanges.Cancel	
No	Continues closing the Folder Properties window, and discards any changes that have been made since the last time the record was saved.	Portal.FolderProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Folder Properties window.	Portal.FolderProperties.UnsavedChanges.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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5.14. Portal Management – Folder Properties – Label Not Unique [Ph1]



General	Description
HelpID	Portal.FolderProperties.LabelNotUnique
Title	Warning – Folder Label Not Unique!
Usage	Alerts the user that a folder with the same label already exists in the parent folder. This dialog could result under any one of the following conditions: 1. The user was creating a new folder, and entered a label that was already in use in the selected parent folder. 2. The user was modifying an existing folder, and changed the label to one that was already in use in the selected parent folder.
	3. The user was copying the folder from one parent folder to another.4. The user was moving the folder from one parent folder to another.
Туре	Modal Dialog Box
Open Focus	OK
Tab Order	1. OK
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder 6.2.7 Manage the Portal Menu – Move a Folder
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
ОК	If the user was creating a new folder, and entered a label that was already in use in the selected parent folder, the user is returned to the Folder Properties DE form, where they can change the label or cancel.	Portal.FolderProperties.LabelNotUnique.OK	
	If the user was modifying an existing folder, and changed the label to one that was already in use in the selected parent folder, the user is returned to the Folder Properties DE form, where they can change the label or cancel.		
	If the user was copying the folder from one parent folder to another, the Folder Properties DE form is opened, and the user can change the label or cancel.		
	If the user was moving the folder from one parent folder to another, the Folder Properties DE form is opened, and the user can change the label or cancel.		

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	Special Rules and Clarifications						
1.	None.						

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002		Original Mockup Final mockup for development review and coding.

Last Updated: 07/15/2003

5.15. Portal Management – Folder Properties – **No** Activation Date Entered [Ph1]



General	Description
HelpID	Portal.FolderProperties.NoActivationDate
Title	No Activation Date Entered
Usage	Alerts the user that they have not entered an Active From date on the Folder Properties – Profile . Without this date, the folder is deactivated.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Yes
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

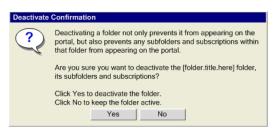
Buttons	Function / Action	HelpID	Hot Key
No	Continues saving the Folder Properties window.	Portal.FolderProperties.NoActivationDate.No	
Yes	Returns the user to the Folder Properties window without saving the record.	Portal.FolderProperties.NoActivationDate.Yes	

	Special Rules and Clarifications
1.	None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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5.16. Portal Management – Folder Properties – Deactivate Confirmation [Ph1]



General	Description
HelpID	Portal.FolderProperties.DeactivateConfirmation
Title	Deactivate Confirmation
Usage	Allows the user to either continue deactiving an active folder on the Portal Menu (Yes), or terminate deactiving the folder (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.5 Manage the Portal Menu – Activate/Deactivate Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates deactiving the folder. If the dialog box was displayed as a result of saving the Folder Properties window with Deactivated field checked, the user is returned to the Folder Properties window. If the dialog box was displayed as a result of responding Yes to Unsaved Changes from a Folder Properties window where Deactivated was selected, the user is returned to the Folder Properties window and the record is not saved. If the dialog box was displayed as a result of the user deactivating the folder directly from the site map, the Portal Menu appears.	Portal.FolderProperties.DeactivateConfirmation.No	
Yes	Continues deactiving the folder. The Portal Menu appears.	Portal.FolderProperties.DeactivateConfirmation.Yes	

	Special Rules and Clarifications				
1. Nor	one.				

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Rev No.	Rev Date	Rev By	Revision Description	
1.00	03/01/2002 TAF		Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

Last Updated: 07/15/2003

5.17. Portal Management – Folder Properties – Paste What [Ph1]



General	Description			
HelpID	Portal.FolderProperties.PasteWhat			
Title	Paste what?			
Usage	his dialog appears when the use copies and pastes a folder from one branch into another branch, allowing the user to hoose what from the source folder they want to copy.			
Туре	1odal Dialog			
Open Focus	Just the folder			
Tab Order	 The folder an all subfolders within the branch. The folder, all subfolders, and all subscriptions within the branch. OK Cancel Just the folder 			
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.6 Manage the Portal Menu – Copy Folder			
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.			

Buttons	Function / Action	HelpID	Hot Key
Cancel	Terminates copying process. The selected folder remains in the clipboard until overwritten with some other copy operation. The Portal Menu appears.	Portal.FolderProperties.PasteWhat.Cancel	
ОК	Continues pasting the folder into the new parent folder, based on the selection made in the dialog. The Portal Menu appears with the new folder highlighted.	Portal.FolderProperties.PasteWhat.OK	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Just the folder	When selected, just the copied folder is pasted into the selected parent folder.	Option 1 fo 3	Yes.	n/a		Portal.FolderPropert ies.PasteWhat.Justt heFolder	

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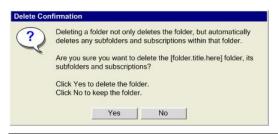
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
	When selected, the entire folder structure within the copied folder is pasted into the selected parent folder.	Option 2 of 3	No	n/a	n/a	Portal.FolderPropert ies.PasteWhat.Fold erandSubfolders	
The folder, all subfolders and all subscriptions within the branch	When selected, the entire branch within the copied folder, including subscriptions, is copied into the new parent folder.		No	n/a	n/a	Portal.FolderPropert ies.PasteWhat.Bran ch	

Special Rules and Clarifications			
1. None.			

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Original Mockup. Final mockup for development review and coding.

Last Updated: 07/15/2003

5.18. Portal Management – Folder Properties – Delete Confirmation [Ph1]



General	Description
HelpID	Portal.FolderProperties.DeleteConfirmation
Title	Delete Confirmation
Usage	Allows the user to either continue deleting the folder from the Portal Menu or Folder Properties DE form (Yes), or terminate deleting the folder (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder 6.2.8 Manage the Portal Menu – Delete Folder
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

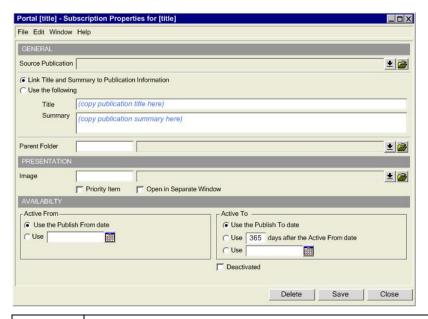
Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the folder. If the dialog box was opened from the Folder Properties window, the user is returned to that window. If the dialog box was opened from the Site Map, the user is returned to the Site Map.	Portal.FolderProperties.DeleteConfirmation.No	
Yes	Continues deleting the folder, and returns the user to the Site Map.	Portal.FolderProperties.DeleteConfirmation.Yes	

Special Rules and Clarifications		
1. None.		

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/01/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

5.19. Portal Management – Subscription Properties – Web-link [Ph1]



General	Description						
HelpID	Portal.SubscriptionProperties.Weblink						
Title	Portal [title] → Subscription Properties for [title]						
Usage	Defines subscription profile information for web-links.						
	This window appears when the user chooses to subscribe to a web-link publication or chooses to view the properties of a subscription.						
Туре	Standard DE form						
Open Focus	Publication Source – Lookup						
Tab Order	 Publication Source – Open Link Title and Summary to Publication Information Use the following – Title Using the following – Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Image Image – Lookup Image – Open Priority Item Open in Separate Window Active From – Use the Publish From Date Active From – Use (date field) Active From – Use (date field) – Lookup Active To – Use the Publish To Date Active To – Use ### days after the Active From date Active To – Use ### days after the Active From date (number field) Active To – Use ### days after the Active From date (number field) Active To 						

General	Description
	 21. Active To – Use (date field) 22. Active To – Use (date field) – Lookup 23. Deactivated 24. Delete 25. Save 26. Close 27. Publication Source – Lookup
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Weblink.ActiveFrom.Lo okup	
Active To – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Weblink.ActiveTo.Look up	
Close	This closes the Subscription Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Subscription Properties window (Cancel).	Portal.SubscriptionProperties.Weblink.Close	
Delete	Deletes the active subscription. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Subscription Properties window.	Portal.SubscriptionProperties.Weblink.Delete	
Image – Lookup	Displays the Select Portal Images window.	Portal.SubscriptionProperties.Weblink.Presentation.PageImage.Lookup	
Image – Open	Opens the Image Properties window for the select image.	Portal.SubscriptionProperties.Weblink.Presentation.PageImage.Open	
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.SubscriptionProperties.Weblink.ParentFolder.Lookup	

Buttons	Function / Action	HelpID	Hot Key
Parent Folder – Open	Opens the Folder Properties window for the selected folder.	Portal.SubscriptionProperties.Weblink.ParentFolder. Open	
Publication Source – Lookup	Displays the Select Publication window.	Portal.SubscriptionProperties.Weblink.PublicationSource.Lookup	
Publication Source – Open	Opens the Publications Properties window for the selected publication.	Portal.SubscriptionProperties.Weblink.PublicationSource.Open	
Save	This saves the Subscription Properties record. The window remains open.	Portal.SubscriptionProperties.Weblink.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use	The Active From date is the date from which the subscription will be active and can be presented.	Option 2 of 2 in the Active From set.	No	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveFrom.Use	
	If this option is selected, a date must be entered in the field in order for the subscription to be active.						
	If the field is left null, the subscription will be automatically deactivated.						
Active From – Use (date)	The Active From date is the date from which the subscription will be active and can be presented. If the field is left null, the subscription will be	Date	If Use the Publish From Date is selected, pre- populate this field with Publish From date of the publication.	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveFrom.Date	
	automatically deactivated.		Otherwise, leave blank.				

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use the Publish From Date	Th Active From date is the date from which the subscription will be active and can be presented. If this option is selected, the Active From date is linked to the Publish From date. The current Publish From date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 2 in the Active From set.	Yes	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveFrom.LinktoPub lishFrom	
	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is calculated by taking the number of days entered in the field, and adding them to the Active From date. The resulting date appears in the Active To date field, which is now disabled so it can't be changed.	Option 2 of 3 in the Active To set.	No	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveTo.UseDays	
Active To – Use ### days after the Active From date (number)	This is the number of days to be added to the Active From date, thereby generating an Active To date.	Number	No	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveTo.UseDaysNu mber	
Active To – Use	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the user can enter a specific termination date, or leave the field blank. If the field is left null, there is no expiration date for the subscription.	Option 2 of 3 in the Active From set.	N	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveTo.UseDate	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use (date)	The Active To date is the date through which the subscription will be active and can be presented. If either the Use ### days after the Active From date or Use the Publish To Date option is selected, the date in this field is read only, and can not be edited. If the field is left null, there is no expiration date for the subscription.	Date	If Use ### days after the Active From date is selected, pre- populate this field with the results of adding the number entered to the Active From date. If Use the Publish To Date is selected, pre-populate this field with the Publish To date of the publication.	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveTo.Date	
Active To – Use the Publish To Date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is linked to the Publish To date. The current Publish To date appears in the date field, which is now disabled so it can't be	Option 1 of 3 in the Active To set.	Yes	N	N	Portal.SubscriptionP roperties.Weblink.A ctiveTo.LinktoPublis hTo	
Deactivated	changed. If selected, the subscription cannot be presented, even of the Active From date has passed, and the Active To date has not been reached.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field is not checked by default.	N	N	Portal.SubscriptionP roperties.Weblink.D eactivated	
Image	This is the image that will represent the subscription on the Parent Folder summary page. By default, the Image from the Publication is copied into this field.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	Y	Υ	Portal.SubscriptionP roperties.Weblink.Pr esentation.PageIma ge	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Link Title and Summary to Publication Information	When selected, the Title and Summary fields are linked to the Title and Summary from the Publication. The values from the publication populates the fields in the subscription, but they cannot be edited.	Option 1 of 2 in a set with Use the following	Yes	N	N	Portal.SubscriptionP roperties.Weblink.Li nkTitleSummary	
Open in Separate Window	If checked, the subscription will be opened in a separate window.	Checkbox	This field is already checked and disabled (so it can't be changed) under the following conditions: 1. The Parent Folder has Open Content in Separate window defined on the Presentation page of the Folder Properties window. 2. The Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. 3. This is a Priority Item and the Parent Folder has Open in Separate window defined for Priority Items on the Presentation page of the Folder Properties window. 4. This is a	N	N	Portal.SubscriptionProperties.Weblink.Presentation.OpeninSeparateWindow	

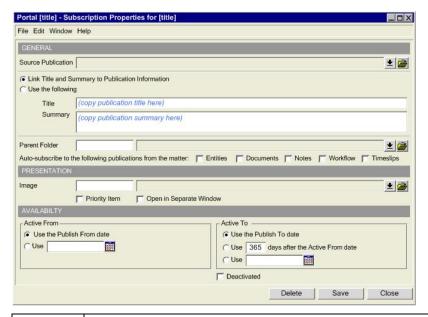
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
			Priority Item and the Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. Otherwise, null.				
Parent Folder	This is the parent folder in which the active subscription will appear on the portal. If this field is null, the subscription appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	This field is automatically populated with the folder that was active on the menu.	N	N	Portal.SubscriptionP roperties.Weblink.Pr esentation.ParentFo Ider	
Priority Item	If checked, it indicates the subscription is a priority item and will be displayed in the Priority Item section of the summary page for the Parent Folder .	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Weblink.Pr esentation.PriorityIte m	
Publication Source	This is the Title of the source Publication for the subscription.	Read-only text.	Null	Υ	Υ	Portal.SubscriptionP roperties.Weblink.P ublicationSource	
Use the following	When selected, the Title and Summary fields are populated with the Title and Summary from the Publication. These fields can then be edited. If the Title and Summary in the Publication are changed, these fields are not updated.	Option 2 of 2 in a set with Link Title and Summary to Publication Information	No	N	N	Portal.SubscriptionP roperties.Weblink.U seTitleSummary	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the following – Summary	This is a summary of the subscription. Through presentation options, this summary can appear below the title on the parent folder summary page. By default, the Summary from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Summary from the Publication	N	N	Portal.SubscriptionP roperties.Weblink.S ummary	
Use the following – Title	This is the title of the subscription. It appears in the title area on the home page. By default, the Title from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Title from the Publication	Y	Y	Portal.SubscriptionP roperties.Weblink.Tit le	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description				
1.00	03/02/2002	TAF	Original Mockup				
1.10	03/18/2002	TAF	Final mockup for development review and coding.				

5.20. Portal Management – Subscription Properties – Matter [Ph1]



General	Description						
HelpID	Portal.SubscriptionProperties.Matter						
Title	Portal [title] → Subscription Properties for [title]						
Usage	Defines subscription profile information for matters.						
	This window appears when the user chooses to subscribe to a matter publication or chooses to view the properties of a subscription.						
Туре	Standard DE form						
Open Focus	Publication Source – Lookup						
Tab Order	 Publication Source – Open Link Title and Summary to Publication Information Use the following – Title Using the following – Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Auto-subscribe to the following publications from the matter – Entities Auto-subscribe to the following publications from the matter – Notes Auto-subscribe to the following publications from the matter – Workflow Auto-subscribe to the following publications from the matter – Timeslips Image Image – Lookup Image – Open Priority Item Open in Separate Window Active From – Use the Publish From Date Active From – Use (date field) 						

Last Updated: 07/15/2003

General	Description
GONOIGI	21. Active From – Use (date field) – Lookup 22. Active To – Use the Publish To Date 23. Active To – Use ### days after the Active From date 24. Active To – Use ### days after the Active From date (number field) 25. Active To 26. Active To – Use (date field) 27. Active To – Use (date field) – Lookup 28. Deactivated 29. Delete 30. Save 31. Close
Related Use Cases	32. Publication Source – Lookup 6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Matter.ActiveFrom.Loo kup	
Active To – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Matter.ActiveTo.Looku p	
Close	This closes the Subscription Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Subscription Properties window (Cancel).	Portal.SubscriptionProperties.Matter.Close	
Delete	Deletes the active subscription. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Subscription Properties window.	Portal.SubscriptionProperties.Matter.Delete	
Image – Lookup	Displays the Select Portal Images window.	Portal.SubscriptionProperties.Matter.Presentation.Pa gelmage.Lookup	

Buttons	Function / Action	HelpID	Hot Key
Image – Open	Opens the Image Properties window for the select image.	Portal.SubscriptionProperties.Matter.Presentation.Pa gelmage.Open	
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.SubscriptionProperties.Matter.ParentFolder.Lo okup	
Parent Folder - Open	Opens the Folder Properties window for the selected folder.	Portal.SubscriptionProperties.Matter.ParentFolder.Op en	
Publication Source – Lookup	Displays the Select Publication window.	Portal.SubscriptionProperties.Matter.PublicationSour ce.Lookup	
Publication Source – Open	Opens the Publications Properties window for the selected publication.	Portal.SubscriptionProperties.Matter.PublicationSource.Open	
Save	This saves the Subscription Properties record. The window remains open.	Portal.SubscriptionProperties.Matter.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use	The Active From date is the date from which the subscription will be active and can be presented. If this option is selected, a date must be entered in the field in order for the subscription to be active. If the field is left null, the subscription will be automatically deactivated.	Option 2 of 2 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Matters – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Matter.Acti veFrom.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use (date)	The Active From date is the date from which the subscription will be active and can be presented. If the field is left null, the subscription will be automatically deactivated. This field cannot be edited if Use Publish From Date is selected.	Date	If Use Publish From date is selected in Portal Settings – General – Matters – Subscribing – From, pre-populate the field with the Publish From date of the publication. If Use Today's date is selected in Portal Settings – General – Matters – Subscribing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Matters – Subscribing – From, do not pre- populate the field with a value.	N	N	Portal.SubscriptionP roperties.Matter.Acti veFrom.Date	
Active From – Use the Publish From Date	Th Active From date is the date from which the subscription will be active and can be presented. If this option is selected, the Active From date is linked to the Publish From date. The current Publish From date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 2 in the Active From set.	Yes, if Use Publish From date is selected in Portal Settings – General – Matters – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Matter.Acti veFrom.LinktoPublis hFrom	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use ### days after the Active From date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is calculated by taking the number of days entered in the field, and adding them to the Active From date. The resulting date appears in the Active To date field, which is now disabled so it can't be changed.	Option 2 of 3 in the Active To set.	Yes, if Use ### after the Active From date is selected in Portal Settings – General – Matters – Subscribing – To. Otherwise, No. The number of days defaults to the entry in Portal Settings – General – Matters – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Matter.Acti veTo.UseDays	
Active To – Use ### days after the Active From date (number)	This is the number to add to the Active From date, thereby producing an Active To date.	Number	The number of days defaults to the entry in Portal Settings – General – Matters – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Matter.Acti veTo.UseDaysNum ber	
Active To – Use	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the user can enter a specific termination date, or leave the field blank. If the field is left null, there is no expiration date for the subscription.	Option 2 of 3 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Matters – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Matter.Acti veTo.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use (date)	The Active To date is the date through which the subscription will be active and can be presented. If the field is left null, there is no expiration date for the subscription. This field cannot be edited if Use Publish To Date or Use ### after the Activate From Date is selected.	Date	If Use Publish To date is selected in Portal Settings – General – Matters – Subscribing – From, pre-populate the field with the Publish To date. If Use ### after the Activate From Date is selected in Portal Settings – General – Matters – Subscribing – To, pre-populate the field with the resulting calculation from the default value. If Leave Blank is selected in Portal Settings – General – Matters – Subscribing – To, do not enter a value in the Active To field	N	N	Portal.SubscriptionP roperties.Matter.Acti veTo.Date	
Active To – Use the Publish To Date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is linked to the Publish To date. The current Publish To date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 3 in the Active To set.	Yes, if Use Publish To date is selected in Portal Settings – General – Matters – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Matter.Acti veTo.LinktoPublishT 0	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Auto-subscribe to the following publications from the matter – Documents	When checked, documents created for the source matter that have been published are automatically subscribed to on this portal in the default folder for the Documents publication branch.	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Matter.Aut oSubscribe.Docume nts	
	The subscription uses the Subscription Rules on the Portal Settings – General – Entities tab.						
Auto-subscribe to the following publications from the matter – Entities	When checked, entities related to the matter that have been published are automatically subscribed to on this portal in the default folder for the Entities branch.	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Matter.Aut oSubscribe.Entities	
	The subscription uses the Subscription Rules on the Portal Settings - General - Entities tab.						
Auto-subscribe to the following publications from the matter – Notes	When checked, notes related to the source matter that have been published are automatically subscribed to on this portal in the default folder for the Notes publication branch.	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Matter.Aut oSubscribe.Notes	
	The subscription uses the Subscription Rules on the Portal Settings - General - Entities tab.						

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Auto-subscribe to the following publications from the matter – Timeslips	When checked, timeslips created for the source matter that have been published are automatically subscribed to on this portal in the default folder for the Timeslips publication branch. The subscription uses the Subscription Rules on the Portal Settings – General – Entities	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Matter.Aut oSubscribe.Timeslip s	
Auto-subscribe to the following publications from the matter – Workflow	when checked, workflow items created for the source matter that have been published are automatically subscribed to on this portal in the default folder for the Documents publication branch. The subscription uses the Subscription Rules on the Portal Settings	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Matter.Aut oSubscribe.Workflo w	
	- General - Entities tab.						
Deactivated	If selected, the subscription cannot be presented, even of the Active From date has passed, and the Active To date has not been reached.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field	N	N	Portal.SubscriptionP roperties.Matter.Dea ctivated	
			is not checked by default.				
Image	This is the image that will represent the subscription on the Parent Folder summary page. By default, the Image from the Publication is copied into this field.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	Υ	Υ	Portal.SubscriptionP roperties.Matter.Pre sentation.PageImag e	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Link Title and Summary to Publication Information	When selected, the Title and Summary fields are linked to the Title and Summary from the Publication. The values from the publication populates the fields in the subscription, but they cannot be edited.	Option 1 of 2 in a set with Use the following	Y Note that this option is automatically selected and cannot be changed for an auto-subscription – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Matter.Link TitleSummary	
Open in Separate Window	If checked, the subscription will be opened in a separate window.	Checkbox	This field is already checked and disabled (so it can't be changed) under the following conditions: 1. The Parent Folder has Open Content in Separate window defined on the Presentation page of the Folder Properties window. 2. The Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. 3. This is a Priority Item and the Parent Folder has Open in Separate window defined for Priority Items on the Presentation page of the Presentation page of the Folder Properties	N	N	Portal.SubscriptionP roperties.Matter.Pre sentation.OpeninSe parateWindow	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
			window. 4. This is a Priority Item and the Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. Otherwise, null.				
Parent Folder	This is the parent folder in which the active subscription will appear on the portal. If this field is null, the subscription appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	This field is automatically populated with the folder that was active on the menu.	N	N	Portal.SubscriptionP roperties.Matter.Pre sentation.ParentFol der	
Priority Item	If checked, it indicates the subscription is a priority item and will be displayed in the Priority Item section of the summary page for the Parent Folder .	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Matter.Pre sentation.PriorityIte m	
Publication Source	This is the Title of the source Publication for the subscription.	Read-only text.	Null	Υ	Υ	Portal.SubscriptionP roperties.Matter.Pub licationSource	
Use the following	When selected, the Title and Summary fields are populated with the Title and Summary from the Publication. These fields can then be edited. If the Title and Summary in the Publication are changed, these fields are not updated.	Option 2 of 2 in a set with Link Title and Summary to Publication Information	No Note that this option is not available for an auto- subscriptions – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Matter.Use TitleSummary	

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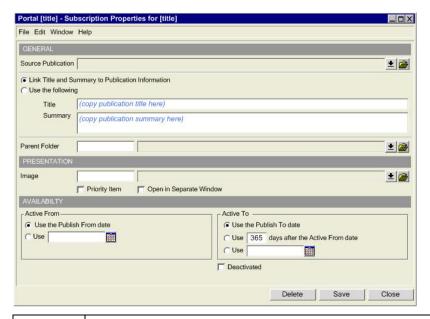
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the following – Summary	This is a summary of the subscription. Through presentation options, this summary can appear below the title on the parent folder summary page. By default, the Summary from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Summary from the Publication	N	N	Portal.SubscriptionP roperties.Matter.Su mmary	
Use the following – Title	This is the title of the subscription. It appears in the title area on the home page. By default, the Title from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Title from the Publication	Y	Y	Portal.SubscriptionP roperties.Matter.Titl e	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

5.21. Portal Management – Subscription Properties – Entity [Ph1]



General	Description		
HelpID	Portal.SubscriptionProperties.Entity		
Title	Portal [title] → Subscription Properties for [title]		
Usage	Defines subscription profile information for web-links.		
	This window appears when the user chooses to subscribe to a entity publication or chooses to view the properties of a subscription.		
Туре	Standard DE form		
Open Focus	Publication Source – Lookup		
Tab Order	 Publication Source – Open Link Title and Summary to Publication Information Use the following – Title Using the following – Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Image Image – Lookup Image – Open Priority Item Open in Separate Window Active From – Use the Publish From Date Active From – Use (date field) Active From – Use (date field) – Lookup Active To – Use the Publish To Date Active To – Use ### days after the Active From date Active To – Use ### days after the Active From date (number field) Active To – Use ### days after the Active From date (number field) Active To 		

General	Description
	 21. Active To – Use (date field) 22. Active To – Use (date field) – Lookup 23. Deactivated 24. Delete 25. Save 26. Close 27. Publication Source – Lookup
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Entity.ActiveFrom.Look up	
Active To – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Entity.ActiveTo.Lookup	
Close	This closes the Subscription Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Subscription Properties window (Cancel).	Portal.SubscriptionProperties.Entity.Close	
Delete	Deletes the active subscription. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Subscription Properties window.	Portal.SubscriptionProperties.Entity.Delete	
Image – Lookup	Displays the Select Portal Images window.	Portal.SubscriptionProperties.Entity.Presentation.Pag elmage.Lookup	
Image – Open	Opens the Image Properties window for the select image.	Portal.SubscriptionProperties.Entity.Presentation.Pag elmage.Open	
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.SubscriptionProperties.Entity.ParentFolder.Loo kup	

Buttons	Function / Action	HelpID	Hot Key
Parent Folder - Open	Opens the Folder Properties window for the selected folder.	Portal.SubscriptionProperties.Entity.ParentFolder.Op en	
Publication Source – Lookup	Displays the Select Publication window.	Portal.SubscriptionProperties.Entity.PublicationSourc e.Lookup	
Publication Source – Open	Opens the Publications Properties window for the selected publication.	Portal.SubscriptionProperties.Entity.PublicationSourc e.Open	
Save	This saves the Subscription Properties record. The window remains open.	Portal.SubscriptionProperties.Entity.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use	The Active From date is the date from which the subscription will be active and can be presented. If this option is selected, a date must be entered in the field in order for the subscription to be active. If the field is left null, the subscription will be automatically deactivated.	Option 2 of 2 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Entities – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Entity.Activ eFrom.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use (date)	The Active From date is the date from which the subscription will be active and can be presented. If the field is left null, the subscription will be automatically deactivated. This field cannot be edited if Use Publish From Date is selected.	Date	If Use Publish From date is selected in Portal Settings – General – Entities – Subscribing – From, pre-populate the field with the Publish From date of the publication. If Use Today's date is selected in Portal Settings – General – Entities – Subscribing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Entities – Subscribing – From, do not pre- populate the field with a value.	N	N	Portal.SubscriptionP roperties.Entity.Activ eFrom.Date	
Active From – Use the Publish From Date	Th Active From date is the date from which the subscription will be active and can be presented. If this option is selected, the Active From date is linked to the Publish From date. The current Publish From date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 2 in the Active From set.	Yes, if Use Publish From date is selected in Portal Settings – General – Entities – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Entity.Activ eFrom.LinktoPublish From	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use ### days after the Active From date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is calculated by taking the number of days entered in the field, and adding them to the Active From date. The resulting date appears in the Active To date field, which is now disabled so it can't be changed.	Option 2 of 3 in the Active To set.	Yes, if Use ### after the Active From date is selected in Portal Settings – General – Entities – Subscribing – To. Otherwise, No. The number of days defaults to the entry in Portal Settings – General – Entities – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Entity.Activ eTo.UseDays	
Active To – Use ### days after the Active From date (number)		Number	The number of days defaults to the entry in Portal Settings – General – Entities – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Entity.Activ eTo.UseDaysNumb er	
Active To – Use	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the user can enter a specific termination date, or leave the field blank. If the field is left null, there is no expiration date for the subscription.	Option 2 of 3 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Entities – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Entity.Activ eTo.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use (date)	The Active To date is the date through which the subscription will be active and can be presented. If the field is left null, there is no expiration date for the subscription. This field cannot be edited if Use Publish To Date or Use ### after the Activate From Date is selected.	Date	If Use Publish To date is selected in Portal Settings – General – Entities – Subscribing – From, pre-populate the field with the Publish To date. If Use ### after the Activate From Date is selected in Portal Settings – General – Entities – Subscribing – To, pre-populate the field with the resulting calculation from the default value. If Leave Blank is selected in Portal Settings – General – Entities – Subscribing – To, do not enter a value in the Active To field	N	N	Portal.SubscriptionProperties.Entity.ActiveTo.Date	
Active To – Use the Publish To Date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is linked to the Publish To date. The current Publish To date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 3 in the Active To set.	Yes, if Use Publish To date is selected in Portal Settings – General – Entities – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Entity.Activ eTo.LinktoPublishTo	
Deactivated	If selected, the subscription cannot be presented, even of the Active From date has passed, and the Active To date has not been reached.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field is not checked by default.	N	N	Portal.SubscriptionP roperties.Entity.Dea ctivated	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Image	This is the image that will represent the subscription on the Parent Folder summary page. By default, the Image from the Publication is copied into this field.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	Y	Υ	Portal.SubscriptionP roperties.Entity.Pres entation.PageImage	
Link Title and Summary to Publication Information	When selected, the Title and Summary fields are linked to the Title and Summary from the Publication. The values from the publication populates the fields in the subscription, but they cannot be edited.	Option 1 of 2 in a set with Use the following	Yes Note that this option is automatically selected and cannot be changed for an auto-subscription – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Entity.Link TitleSummary	
Open in Separate Window	If checked, the subscription will be opened in a separate window.	Checkbox	This field is already checked and disabled (so it can't be changed) under the following conditions: 1. The Parent Folder has Open Content in Separate window defined on the Presentation page of the Folder Properties window. 2. The Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. 3. This is a Priority Item and the Parent Folder has Open in	N	N	Portal.SubscriptionP roperties.Entity.Pres entation.OpeninSep arateWindow	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
			Separate window defined for Priority Items on the Presentation page of the Folder Properties window. 4. This is a Priority Item and the Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. Otherwise, null.				
Parent Folder	This is the parent folder in which the active subscription will appear on the portal. If this field is null, the subscription appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	This field is automatically populated with the folder that was active on the menu.	N	N	Portal.SubscriptionP roperties.Entity.Pres entation.ParentFold er	
Priority Item	If checked, it indicates the subscription is a priority item and will be displayed in the Priority Item section of the summary page for the Parent Folder .	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Entity.Pres entation.PriorityItem	
Publication Source	This is the Title of the source Publication for the subscription.	Read-only text.	Null	Υ	Υ	Portal.SubscriptionP roperties.Entity.Publ icationSource	

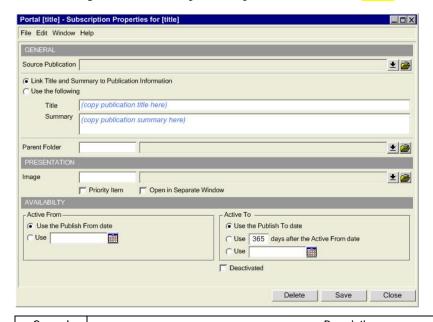
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the following	When selected, the Title and Summary fields are populated with the Title and Summary from the Publication. These fields can then be edited. If the Title and Summary in the Publication are changed, these fields are not updated.	Option 2 of 2 in a set with Link Title and Summary to Publication Information	No Note that this option is not available for an auto- subscriptions – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Entity.Use TitleSummary	
Use the following – Summary	This is a summary of the subscription. Through presentation options, this summary can appear below the title on the parent folder summary page. By default, the Summary from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Summary from the Publication	N	N	Portal.SubscriptionP roperties.Entity.Sum mary	
Use the following – Title	This is the title of the subscription. It appears in the title area on the home page. By default, the Title from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Title from the Publication	Y	Y	Portal.SubscriptionP roperties.Entity.Title	

Special Rules and Clarifications 5. None.

Rev No.	Rev Date	Rev By Revision Description			
1.00	03/02/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

5.22. Portal Management – Subscription Properties – Document [Ph1]

Printed: 06/12/2018



General	Description					
HelpID	Portal.SubscriptionProperties.Document					
Title	Portal [title] → Subscription Properties for [title]					
Usage	Defines subscription profile information for web-links.					
	This window appears when the user chooses to subscribe to a document publication or chooses to view the properties of a subscription.					
Туре	Standard DE form					
Open Focus	Publication Source – Lookup					
Tab Order	 Publication Source – Open Link Title and Summary to Publication Information Use the following – Title Using the following – Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Image Image – Lookup Image – Open Priority Item Open in Separate Window Active From – Use the Publish From Date Active From – Use (date field) – Lookup Active From – Use (date field) – Lookup Active To – Use the Publish To Date Active To – Use ## days after the Active From date Active To – Use ### days after the Active From date (number field) Active To 					

General	Description
	 21. Active To – Use (date field) 22. Active To – Use (date field) – Lookup 23. Deactivated 24. Delete 25. Save 26. Close 27. Publication Source – Lookup
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Document.ActiveFrom. Lookup	
Active To – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Document.ActiveTo.Lo okup	
Close	This closes the Subscription Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Subscription Properties window (Cancel).	Portal.SubscriptionProperties.Document.Close	
Delete	Deletes the active subscription. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Subscription Properties window.	Portal.SubscriptionProperties.Document.Delete	
Image – Lookup	Displays the Select Portal Images window.	Portal.SubscriptionProperties.Document.Presentation .PageImage.Lookup	
Image – Open	Opens the Image Properties window for the select image.	Portal.SubscriptionProperties.Document.Presentation .PageImage.Open	
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.SubscriptionProperties.Document.ParentFolde r.Lookup	

Buttons	Function / Action	HelpID	Hot Key
Parent Folder - Open	Opens the Folder Properties window for the selected folder.	Portal.SubscriptionProperties.Document.ParentFolde r.Open	
Publication Source – Lookup	Displays the Select Publication window.	Portal.SubscriptionProperties.Document.PublicationS ource.Lookup	
Publication Source – Open	Opens the Publications Properties window for the selected publication.	Portal.SubscriptionProperties.Document.PublicationS ource.Open	
Save	This saves the Subscription Properties record. The window remains open.	Portal.SubscriptionProperties.Document.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use	The Active From date is the date from which the subscription will be active and can be presented. If this option is selected, a date must be entered in the field in order for the subscription to be active. If the field is left null, the subscription will be automatically deactivated.	Option 2 of 2 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Documents – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Document. ActiveFrom.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use (date)	The Active From date is the date from which the subscription will be active and can be presented. If the field is left null, the subscription will be automatically deactivated. This field cannot be edited if Use Publish From Date is selected.	Date	If Use Publish From date is selected in Portal Settings – General – Documents – Subscribing – From, pre-populate the field with the Publish From date of the publication. If Use Today's date is selected in Portal Settings – General – Documents – Subscribing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Documents – Subscribing – From, do not pre- populate the field with a value.	N	N	Portal.SubscriptionP roperties.Document. ActiveFrom.Date	
Active From – Use the Publish From Date	Th Active From date is the date from which the subscription will be active and can be presented. If this option is selected, the Active From date is linked to the Publish From date. The current Publish From date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 2 in the Active From set.	Yes, if Use Publish From date is selected in Portal Settings – General – Documents – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Document. ActiveFrom.LinktoP ublishFrom	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use ### days after the Active From date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is calculated by taking the number of days entered in the field, and adding them to the Active From date. The resulting date appears in the Active To date field, which is now disabled so it can't be changed.	Option 2 of 3 in the Active To set.	Yes, if Use ### after the Active From date is selected in Portal Settings – General – Documents – Subscribing – To. Otherwise, No. The number of days defaults to the entry in Portal Settings – General – Documents – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Document. ActiveTo.UseDays	
Active To – Use ### days after the Active From date (number)		Number	The number of days defaults to the entry in Portal Settings – General – Documents – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Document. ActiveTo.UseDaysN umber	
Active To – Use	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the user can enter a specific termination date, or leave the field blank. If the field is left null, there is no expiration date for the subscription.	Option 2 of 3 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Documents – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Document. ActiveTo.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use (date)	The Active To date is the date through which the subscription will be active and can be presented. If the field is left null, there is no expiration date for the subscription.	Date	If Use Publish To date is selected in Portal Settings – General – Documents – Subscribing – From, pre-populate the field with the Publish To date.	N	N	Portal.SubscriptionP roperties.Document. ActiveTo.Date	
	This field cannot be edited if Use Publish To Date or Use ### after the Activate From Date is selected.		If Use ### after the Activate From Date is selected in Portal Settings – General – Documents – Subscribing – To, pre-populate the field with the resulting calculation from the default value.				
			If Leave Blank is selected in Portal Settings – General – Documents – Subscribing – To, do not enter a value in the Active To field				
Active To – Use the Publish To Date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is linked to the Publish To date. The current Publish To date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 3 in the Active To set.	Yes, if Use Publish To date is selected in Portal Settings – General – Documents – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Document. ActiveTo.LinktoPubli shTo	
Deactivated	If selected, the subscription cannot be presented, even of the Active From date has passed, and the Active To date has not been reached.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field is not checked by default.	N	N	Portal.SubscriptionP roperties.Document. Deactivated	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Image	This is the image that will represent the subscription on the Parent Folder summary page. By default, the Image from the Publication is copied into this field.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	Y	Υ	Portal.SubscriptionP roperties.Document. Presentation.Pagel mage	
Link Title and Summary to Publication Information	When selected, the Title and Summary fields are linked to the Title and Summary from the Publication. The values from the publication populates the fields in the subscription, but they cannot be edited.	Option 1 of 2 in a set with Use the following	Y Note that this option is automatically selected and cannot be changed for an auto-subscription – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Document. LinkTitleSummary	
Open in Separate Window	If checked, the subscription will be opened in a separate window.	Checkbox	This field is already checked and disabled (so it can't be changed) under the following conditions: 1. The Parent Folder has Open Content in Separate window defined on the Presentation page of the Folder Properties window. 2. The Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. 3. This is a Priority Item and the Parent Folder has Open in	N	N	Portal.SubscriptionP roperties.Document. Presentation.Openin SeparateWindow	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
			Separate window defined for Priority Items on the Presentation page of the Folder Properties window. 4. This is a Priority Item and the Parent Folder is null and the portal has Open Content in Separate window defined on the General Presentation page of the Portal Properties window.				
Parent Folder	This is the parent folder in which the active subscription will appear on the portal. If this field is null, the subscription appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	This field is automatically populated with the folder that was active on the menu.	N	N	Portal.SubscriptionP roperties.Document. Presentation.Parent Folder	
Priority Item	If checked, it indicates the subscription is a priority item and will be displayed in the Priority Item section of the summary page for the Parent Folder .	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Document. Presentation.Priority Item	
Publication Source	This is the Title of the source Publication for the subscription.	Read-only text.	Null	Υ	Υ	Portal.SubscriptionP roperties.Document. PublicationSource	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the following	When selected, the Title and Summary fields are populated with the Title and Summary from the Publication. These fields can then be edited. If the Title and Summary in the Publication are changed, these fields are not updated.	Option 2 of 2 in a set with Link Title and Summary to Publication Information	No Note that this option is not available for an auto- subscriptions – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Document. UseTitleSummary	
Use the following – Summary	This is a summary of the subscription. Through presentation options, this summary can appear below the title on the parent folder summary page. By default, the Summary from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Summary from the Publication	N	N	Portal.SubscriptionP roperties.Document. Summary	
Use the following – Title	This is the title of the subscription. It appears in the title area on the home page. By default, the Title from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Title from the Publication	Y	Y	Portal.SubscriptionP roperties.Document. Title	

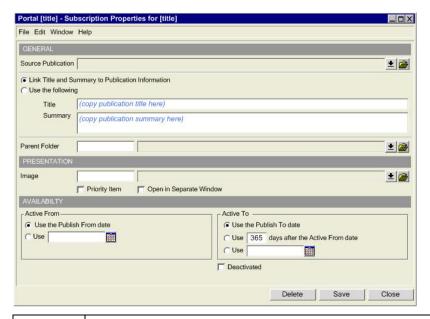
Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018

Last Updated: 07/15/2003

5.23. Portal Management – Subscription Properties – Note [Ph1]



General	Description						
HelpID	Portal.SubscriptionProperties.Note						
Title	Portal [title] → Subscription Properties for [title]						
Usage	Defines subscription profile information for web-links.						
	This window appears when the user chooses to subscribe to a note publication or chooses to view the properties of a subscription.						
Туре	Standard DE form						
Open Focus	Publication Source – Lookup						
Tab Order	 Publication Source – Open Link Title and Summary to Publication Information Use the following – Title Using the following – Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Image Image – Lookup Image – Open Priority Item Open in Separate Window Active From – Use the Publish From Date Active From – Use (date field) Active From – Use (date field) – Lookup Active To – Use the Publish To Date Active To – Use ### days after the Active From date Active To – Use ### days after the Active From date (number field) Active To – Use ### days after the Active From date (number field) Active To 						

General	Description
	21. Active To – Use (date field) 22. Active To – Use (date field) – Lookup 23. Deactivated 24. Delete 25. Save 26. Close 27. Publication Source – Lookup
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Note.ActiveFrom.Looku p	
Active To – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Note.ActiveTo.Lookup	
Close	This closes the Subscription Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Subscription Properties window (Cancel).	Portal.SubscriptionProperties.Note.Close	
Delete	Deletes the active subscription. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Subscription Properties window.	Portal.SubscriptionProperties.Note.Delete	
Image – Lookup	Displays the Select Portal Images window.	Portal.SubscriptionProperties.Note.Presentation.Pag elmage.Lookup	
Image – Open	Opens the Image Properties window for the select image.	Portal.SubscriptionProperties.Note.Presentation.Pag elmage.Open	
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.SubscriptionProperties.Note.ParentFolder.Loo kup	

Buttons	Function / Action	HelpID	Hot Key
Parent Folder – Open	Opens the Folder Properties window for the selected folder.	Portal.SubscriptionProperties.Note.ParentFolder.Ope	
Publication Source – Lookup	Displays the Select Publication window.	Portal.SubscriptionProperties.Note.PublicationSource .Lookup	
Publication Source – Open	Opens the Publications Properties window for the selected publication.	Portal.SubscriptionProperties.Note.PublicationSource .Open	
Save	This saves the Subscription Properties record. The window remains open.	Portal.SubscriptionProperties.Note.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use	The Active From date is the date from which the subscription will be active and can be presented. If this option is selected, a date must be entered in the field in order for the subscription to be active. If the field is left null, the subscription will be automatically deactivated.	Option 2 of 2 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Notes – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Note.Activ eFrom.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use (date)	The Active From date is the date from which the subscription will be active and can be presented. If the field is left null, the subscription will be automatically deactivated. This field cannot be edited if Use Publish From Date is selected.	Date	If Use Publish From date is selected in Portal Settings – General – Notes – Subscribing – From, pre-populate the field with the Publish From date of the publication. If Use Today's date is selected in Portal Settings – General – Notes – Subscribing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Notes – Subscribing – From, do not pre- populate the field with a value.	N	N	Portal.SubscriptionP roperties.Note.Activ eFrom.Date	
Active From – Use the Publish From Date	Th Active From date is the date from which the subscription will be active and can be presented. If this option is selected, the Active From date is linked to the Publish From date. The current Publish From date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 2 in the Active From set.	Yes, if Use Publish From date is selected in Portal Settings – General – Notes – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Note.Activ eFrom.LinktoPublish From	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is calculated by taking the number of days entered in the field, and adding them to the Active From date. The resulting date appears in the Active To date field, which is now disabled so it can't be changed.	Option 2 of 3 in the Active To set.	Yes, if Use ### after the Active From date is selected in Portal Settings – General – Notes – Subscribing – To. Otherwise, No. The number of days defaults to the entry in Portal Settings – General – Notes – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Note.Activ eTo.UseDays	
days after the Active	This is the number to add to the Active From date, thereby producing an Active To date.	Number	The number of days defaults to the entry in Portal Settings – General – Notes – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Note.Activ eTo.UseDaysNumb er	
Active To – Use	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the user can enter a specific termination date, or leave the field blank. If the field is left null, there is no expiration date for the subscription.	Option 2 of 3 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Notes – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Note.Activ eTo.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use (date)	The Active To date is the date through which the subscription will be active and can be presented. If the field is left null, there is no expiration date for the subscription. This field cannot be edited if Use Publish To Date or Use ### after the Activate From Date is selected.	Date	If Use Publish To date is selected in Portal Settings – General – Notes – Subscribing – From, pre-populate the field with the Publish To date. If Use ### after the Activate From Date is selected in Portal Settings – General – Notes – Subscribing – To, pre-populate the field with the resulting calculation from the default value. If Leave Blank is selected in Portal Settings – General – Notes – Subscribing – To, do not enter a value in the Active To field	N	N	Portal.SubscriptionProperties.Note.ActiveTo.Date	
Active To – Use the Publish To Date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is linked to the Publish To date. The current Publish To date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 3 in the Active To set.	Yes, if Use Publish To date is selected in Portal Settings – General – Notes – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Note.Activ eTo.LinktoPublishTo	
Deactivated	If selected, the subscription cannot be presented, even of the Active From date has passed, and the Active To date has not been reached.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field is not checked by default.	N	N	Portal.SubscriptionP roperties.Note.Deac tivated	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Image	This is the image that will represent the subscription on the Parent Folder summary page. By default, the Image from the Publication is copied into this field.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	Y	Υ	Portal.SubscriptionP roperties.Note.Pres entation.PageImage	
Link Title and Summary to Publication Information	When selected, the Title and Summary fields are linked to the Title and Summary from the Publication. The values from the publication populates the fields in the subscription, but they cannot be edited.	Option 1 of 2 in a set with Use the following	Y Note that this option is automatically selected and cannot be changed for an auto-subscription – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Note.LinkT itleSummary	
Open in Separate Window	If checked, the subscription will be opened in a separate window.	Checkbox	This field is already checked and disabled (so it can't be changed) under the following conditions: 1. The Parent Folder has Open Content in Separate window defined on the Presentation page of the Folder Properties window. 2. The Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. 3. This is a Priority Item and the Parent Folder has Open in	N	N	Portal.SubscriptionProperties.Note.Presentation.OpeninSeparateWindow	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
			Separate window defined for Priority Items on the Presentation page of the Folder Properties window. 4. This is a Priority Item and the Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. Otherwise, null				
Parent Folder	This is the parent folder in which the active subscription will appear on the portal. If this field is null, the subscription appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	This field is automatically populated with the folder that was active on the menu.	N	N	Portal.SubscriptionP roperties.Note.Pres entation.ParentFold er	
Priority Item	If checked, it indicates the subscription is a priority item and will be displayed in the Priority Item section of the summary page for the Parent Folder .	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Note.Pres entation.PriorityItem	
Publication Source	This is the Title of the source Publication for the subscription.	Read-only text.	Null	Υ	Υ	Portal.SubscriptionP roperties.Note.Publi cationSource	

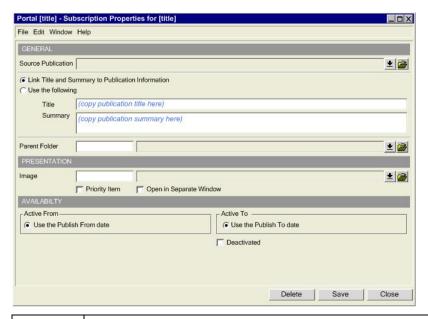
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the following	When selected, the Title and Summary fields are populated with the Title and Summary from the Publication. These fields can then be edited. If the Title and Summary in the Publication are changed, these fields are not updated.	Option 2 of 2 in a set with Link Title and Summary to Publication Information	No Note that this option is not available for an auto- subscriptions – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Note.UseT itleSummary	
Use the following – Summary	This is a summary of the subscription. Through presentation options, this summary can appear below the title on the parent folder summary page. By default, the Summary from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Summary from the Publication	N	N	Portal.SubscriptionP roperties.Note.Sum mary	
Use the following – Title	This is the title of the subscription. It appears in the title area on the home page. By default, the Title from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Title from the Publication	Y	Y	Portal.SubscriptionP roperties.Note.Title	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

5.24. Portal Management – Subscription Properties – Workflow [Ph1]



General	Description
HelpID	Portal.SubscriptionProperties.Workflow
Title	Portal [title] → Subscription Properties for [title]
Usage	Defines subscription profile information for web-links.
	This window appears when the user chooses to subscribe to a workflow item publication or chooses to view the properties of a subscription.
Туре	Standard DE form
Open Focus	Publication Source – Lookup
Tab Order	 Publication Source – Open Link Title and Summary to Publication Information Use the following – Title Using the following – Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Image Image – Lookup Image – Open Priority Item Open in Separate Window Active From – Use the Publish From Date Active From – Use (date field) Active From – Use (date field) – Lookup Active To – Use the Publish To Date Active To – Use ### days after the Active From date Active To – Use ### days after the Active From date (number field) Active To – Use ### days after the Active From date (number field) Active To

General	Description
	 21. Active To – Use (date field) 22. Active To – Use (date field) – Lookup 23. Deactivated 24. Delete 25. Save 26. Close 27. Publication Source – Lookup
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Workflow.ActiveFrom.Lookup	
Active To – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Workflow.ActiveTo.Loo kup	
Close	This closes the Subscription Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Subscription Properties window (Cancel).	Portal.SubscriptionProperties.Workflow.Close	
Delete	Deletes the active subscription. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Subscription Properties window.	Portal.SubscriptionProperties.Workflow.Delete	
Image – Lookup	Displays the Select Portal Images window.	Portal.SubscriptionProperties.Workflow.Presentation. PageImage.Lookup	
Image – Open	Opens the Image Properties window for the select image.	Portal.SubscriptionProperties.Workflow.Presentation. PageImage.Open	
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.SubscriptionProperties.Workflow.ParentFolder. Lookup	

Buttons	Function / Action	HelpID	Hot Key
Parent Folder – Open	Opens the Folder Properties window for the selected folder.	Portal.SubscriptionProperties.Workflow.ParentFolder. Open	
Publication Source – Lookup	Displays the Select Publication window.	Portal.SubscriptionProperties.Workflow.PublicationSource.Lookup	
Publication Source – Open	Opens the Publications Properties window for the selected publication.	Portal.SubscriptionProperties.Workflow.PublicationSource.Open	
Save	This saves the Subscription Properties record. The window remains open.	Portal.SubscriptionProperties.Workflow.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use the Publish From Date	Th Active From date is the date from which the subscription will be active and can be presented. If this option is selected, the Active From date is linked to the Publish From date. The current Publish From date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 2 in the Active From set.	Yes, if Use Publish From date is selected in Portal Settings – General – Matters – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Matter.Acti veFrom.LinktoPublis hFrom	
Active To – Use the Publish To Date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is linked to the Publish To date. The current Publish To date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 3 in the Active To set.	Yes, if Use Publish To date is selected in Portal Settings – General – Matters – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Matter.Acti veTo.LinktoPublishT o	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Deactivated	If selected, the subscription cannot be presented, even of the Active From date has passed, and the Active To date has not been reached.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field	N	N	Portal.SubscriptionP roperties.Workflow. Deactivated	
			is not checked by default.				
Image	This is the image that will represent the subscription on the Parent Folder summary page. By default, the Image from the Publication is copied into this field.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	Y	Υ	Portal.SubscriptionP roperties.Workflow. Presentation.Pagel mage	
Link Title and Summary to Publication Information	When selected, the Title and Summary fields are linked to the Title and Summary from the Publication. The values from the publication populates the fields in the subscription, but they cannot be edited.	Option 1 of 2 in a set with Use the following	Y Note that this option is automatically selected and cannot be changed for an auto-subscription – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Workflow.L inkTitleSummary	
Open in Separate Window	If checked, the subscription will be opened in a separate window.	Checkbox	This field is already checked and disabled (so it can't be changed) under the following conditions: 1. The Parent Folder has Open Content in Separate window defined on the Presentation page of the Folder Properties window. 2. The Parent Folder is null and the portal has Open Content in Separate window defined	N	N	Portal.SubscriptionP roperties.Workflow. Presentation.Openin SeparateWindow	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
			on the General – Presentation page of the Portal Properties window. 3. This is a Priority Item and the Parent Folder has Open in Separate window defined for Priority Items on the Presentation page of the Folder Properties window. 4. This is a Priority Item and the Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. Otherwise, null.				
Parent Folder	This is the parent folder in which the active subscription will appear on the portal. If this field is null, the subscription appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	This field is automatically populated with the folder that was active on the menu.	N	N	Portal.SubscriptionP roperties.Workflow. Presentation.Parent Folder	
Priority Item	If checked, it indicates the subscription is a priority item and will be displayed in the Priority Item section of the summary page for the Parent Folder .	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Workflow. Presentation.Priority Item	
Publication Source	This is the Title of the source Publication for the subscription.	Read-only text.	Null	Υ	Υ	Portal.SubscriptionP roperties.Workflow. PublicationSource	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the following	When selected, the Title and Summary fields are populated with the Title and Summary from the Publication. These fields can then be edited. If the Title and Summary in the Publication are changed, these fields are not updated.	Option 2 of 2 in a set with Link Title and Summary to Publication Information	No Note that this option is not available for an auto- subscriptions – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Workflow. UseTitleSummary	
Use the following – Summary	This is a summary of the subscription. Through presentation options, this summary can appear below the title on the parent folder summary page. By default, the Summary from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Summary from the Publication	N	N	Portal.SubscriptionP roperties.Workflow. Summary	
Use the following – Title	This is the title of the subscription. It appears in the title area on the home page. By default, the Title from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Title from the Publication	Y	Y	Portal.SubscriptionP roperties.Workflow. Title	

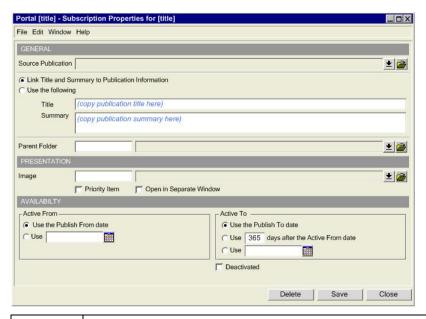
Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018

Last Updated: 07/15/2003

5.25. Portal Management – Subscription Properties – Timeslip [Ph1]



General	Description
HelpID	Portal.SubscriptionProperties.Timeslip
Title	Portal [title] → Subscription Properties for [title]
Usage	Defines subscription profile information for web-links.
	This window appears when the user chooses to subscribe to a timeslip publication or chooses to view the properties of a subscription.
Туре	Standard DE form
Open Focus	Publication Source – Lookup
Tab Order	 Publication Source – Open Link Title and Summary to Publication Information Use the following – Title Using the following – Summary Parent Folder Parent Folder – Lookup Parent Folder – Open Image Image – Lookup Image – Open Priority Item Open in Separate Window Active From – Use the Publish From Date Active From – Use (date field) Active From – Use (date field) – Lookup Active To – Use the Publish To Date Active To – Use ### days after the Active From date Active To – Use ### days after the Active From date (number field) Active To – Use ### days after the Active From date (number field) Active To

General	Description
	21. Active To – Use (date field) 22. Active To – Use (date field) – Lookup 23. Deactivated 24. Delete 25. Save 26. Close 27. Publication Source – Lookup
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Active From – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Timeslip.ActiveFrom.Lo okup	
Active To – Use – Lookup	Displays a calendar that allows the user to select a date. The calendar defaults to the existing date in the field or today's date if null.	Portal.SubscriptionProperties.Timeslip.ActiveTo.Look up	
Close	This closes the Subscription Properties window. Upon clicking Close , if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Subscription Properties window (Cancel).	Portal.SubscriptionProperties.Timeslip.Close	
Delete	Deletes the active subscription. Upon clicking Delete , a dialog box appears, offering the options of continuing to delete the record (Yes) or keeping it (No). If the user chooses Yes , the record is deleted and the user returns to the Subscriptions page of the portal. If the user chooses No , the record is not deleted, and the user returns to the Subscription Properties window.	Portal.SubscriptionProperties.Timeslip.Delete	
Image – Lookup	Displays the Select Portal Images window.	Portal.SubscriptionProperties.Timeslip.Presentation. PageImage.Lookup	
Image – Open	Opens the Image Properties window for the select image.	Portal.SubscriptionProperties.Timeslip.Presentation. PageImage.Open	
Parent Folder – Lookup	Displays the Select Portal Folders window.	Portal.SubscriptionProperties.Timeslip.ParentFolder. Lookup	

Last Updated: 07/15/2003

Buttons	Function / Action	HelpID		
Parent Folder – Open	Opens the Folder Properties window for the selected folder.	Portal.SubscriptionProperties.Timeslip.ParentFolder. Open		
Publication Source – Lookup	Displays the Select Publication window.	Portal.SubscriptionProperties.Timeslip.PublicationSo urce.Lookup		
Publication Source – Open	Opens the Publications Properties window for the selected publication.	Portal.SubscriptionProperties.Timeslip.PublicationSo urce.Open		
Save	This saves the Subscription Properties record. The window remains open.	Portal.SubscriptionProperties.Timeslip.Save		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use	The Active From date is the date from which the subscription will be active and can be presented. If this option is selected, a date must be entered in the field in order for the subscription to be active. If the field is left null, the subscription will be automatically deactivated.	Option 2 of 2 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Timeslips – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveFrom.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active From – Use (date)	The Active From date is the date from which the subscription will be active and can be presented. If the field is left null, the subscription will be automatically deactivated. This field cannot be edited if Use Publish From Date is selected.	Date	If Use Publish From date is selected in Portal Settings – General – Timeslips – Subscribing – From, pre-populate the field with the Publish From date of the publication. If Use Today's date is selected in Portal Settings – General – Timeslips – Subscribing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Timeslips – Subscribing – From, do not pre- populate the field with a value.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveFrom.Date	
Active From – Use the Publish From Date	Th Active From date is the date from which the subscription will be active and can be presented. If this option is selected, the Active From date is linked to the Publish From date. The current Publish From date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 2 in the Active From set.	Yes, if Use Publish From date is selected in Portal Settings – General – Timeslips – Subscribing – From. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveFrom.LinktoPub lishFrom	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use ### days after the Active From date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is calculated by taking the number of days entered in the field, and adding them to the Active From date. The resulting date appears in the Active To date field, which is now disabled so it can't be changed.	Option 2 of 3 in the Active To set.	Yes, if Use ### after the Active From date is selected in Portal Settings – General – Timeslips – Subscribing – To. Otherwise, No. The number of days defaults to the entry in Portal Settings – General – Timeslips – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveTo.UseDays	
Active To – Use ### days after the Active From date (number)		Number	The number of days defaults to the entry in Portal Settings – General – Timeslips – Subscribing – To.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveTo.UseDaysNu mber	
Active To – Use	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the user can enter a specific termination date, or leave the field blank. If the field is left null, there is no expiration date for the subscription.	Option 2 of 3 in the Active From set.	Yes, if Use Today's date or Leave Blank is selected in Portal Settings – General – Timeslips – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveTo.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Active To – Use (date)	The Active To date is the date through which the subscription will be active and can be presented. If the field is left null, there is no expiration date for the subscription.	Date	If Use Publish To date is selected in Portal Settings – General – Timeslips – Subscribing – From, pre-populate the field with the Publish To date.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveTo.Date	
	This field cannot be edited if Use Publish To Date or Use ### after the Activate From Date is selected.		If Use ### after the Activate From Date is selected in Portal Settings – General – Timeslips – Subscribing – To, pre-populate the field with the resulting calculation from the default value.				
			If Leave Blank is selected in Portal Settings – General – Timeslips – Subscribing – To, do not enter a value in the Active To field				
Active To – Use the Publish To Date	The Active To date is the date through which the subscription will be active and can be presented. If this option is selected, the Active To date is linked to the Publish To date. The current Publish To date appears in the date field, which is now disabled so it can't be changed.	Option 1 of 3 in the Active To set.	Yes, if Use Publish To date is selected in Portal Settings – General – Timeslips – Subscribing – To. Otherwise, No.	N	N	Portal.SubscriptionP roperties.Timeslip.A ctiveTo.LinktoPublis hTo	
Deactivated	If selected, the subscription cannot be presented, even of the Active From date has passed, and the Active To date has not been reached.	Checkbox	If Require user to activate portals, folders and subscriptions is selected on the Portal Settings – General page, this field is checked. Otherwise, this field is not checked by default.	N	N	Portal.SubscriptionP roperties.Timeslip.D eactivated	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Image	This is the image that will represent the subscription on the Parent Folder summary page. By default, the Image from the Publication is copied into this field.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	Y	Υ	Portal.SubscriptionP roperties.Timeslip.P resentation.PageIm age	
Link Title and Summary to Publication Information	When selected, the Title and Summary fields are linked to the Title and Summary from the Publication. The values from the publication populates the fields in the subscription, but they cannot be edited.	Option 1 of 2 in a set with Use the following	Y Note that this option is automatically selected and cannot be changed for an auto-subscription – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Timeslip.Li nkTitleSummary	
Open in Separate Window	If checked, the subscription will be opened in a separate window.	Checkbox	This field is already checked and disabled (so it can't be changed) under the following conditions: 1. The Parent Folder has Open Content in Separate window defined on the Presentation page of the Folder Properties window. 2. The Parent Folder is null and the portal has Open Content in Separate window defined on the General Presentation page of the Portal Properties window. 3. This is a Priority Item and the Parent Folder has Open in Separate	N	N	Portal.SubscriptionP roperties.Timeslip.P resentation.OpeninS eparateWindow	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
			window defined for Priority Items on the Presentation page of the Folder Properties window. 4. This is a Priority Item and the Parent Folder is null and the portal has Open Content in Separate window defined on the General – Presentation page of the Portal Properties window. Otherwise, null.				
Parent Folder	This is the parent folder in which the active subscription will appear on the portal. If this field is null, the subscription appears directly under the portal, on the top level of the menu.	Code – Searches for folders based on code. Description – Read- only text description of the selected folder.	This field is automatically populated with the folder that was active on the menu.	N	N	Portal.SubscriptionP roperties.Timeslip.P resentation.ParentF older	
Priority Item	If checked, it indicates the subscription is a priority item and will be displayed in the Priority Item section of the summary page for the Parent Folder .	Checkbox	Null	N	N	Portal.SubscriptionP roperties.Timeslip.P resentation.PriorityIt em	
Publication Source	This is the Title of the source Publication for the subscription.	Read-only text.	Null	Υ	Υ	Portal.SubscriptionP roperties.Timeslip.P ublicationSource	

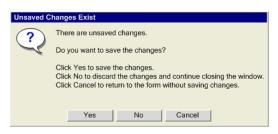
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Use the following	When selected, the Title and Summary fields are populated with the Title and Summary from the Publication. These fields can then be edited. If the Title and Summary in the Publication are changed, these fields are not updated.	Option 2 of 2 in a set with Link Title and Summary to Publication Information	No Note that this option is not available for an auto- subscriptions – that is, the subscription is for a branch on the Publication tree and not a publication itself.	N	N	Portal.SubscriptionP roperties.Timeslip.U seTitleSummary	
Use the following – Summary	This is a summary of the subscription. Through presentation options, this summary can appear below the title on the parent folder summary page. By default, the Summary from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Summary from the Publication	N	N	Portal.SubscriptionP roperties.Timeslip.S ummary	
Use the following – Title	This is the title of the subscription. It appears in the title area on the home page. By default, the Title from the Publication is copied into this field when the Use the following option is selected. It can be edited.	Text	Title from the Publication	Y	Y	Portal.SubscriptionP roperties.Timeslip.Ti tle	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

5.26. Portal Management – Subscription Properties – Unsaved Changes Exist [Ph1]



General	Description
HelpID	Portal.SubscriptionProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on the Subscription Properties window.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	 No Cancel Yes
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.2 Manage Subscriptions – Modify a Subscription
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Subscription Properties window without saving or discarding the changes.	Portal.SubscriptionProperties.UnsavedChanges.Can cel	
No	Continues closing the Subscription Properties window, and discards any changes that have been made since the last time the record was saved.	Portal.SubscriptionProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Subscription Properties window.	Portal.SubscriptionProperties.UnsavedChanges.Yes	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

5.27. Portal Management – Subscription Properties – **No** Activation Date Entered [Ph1]



General	Description
HelpID	Portal.SubscriptionProperties.NoActivationDate
Title	No Activation Date Entered
Usage	Alerts the user that they have not entered an Active From date on the Subscription Properties – Profile . Without this date, the subscription is deactivated.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Yes
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.2 Manage Subscriptions – Modify a Subscription
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

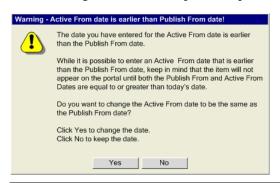
Buttons	Function / Action	HelpID	Hot Key
No	Continues saving the Subscription Properties window.	Portal.SubscriptionProperties.NoActivationDate.No	
Yes	Returns the user to the Subscription Properties window without saving the record.	Portal.SubscriptionProperties.NoActivationDate.Yes	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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5.28. Portal Management – Subscription Properties – Warning – From Dates Mismatch [Ph1]



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General	Description
HelpID	Portal.SubscriptionProperties.FromDatesMismatch
Title	Warning – Active From date is earlier than Publish From date
Usage	Advises the user that the Active From date is earlier than the Publish From date, allowing them to synchronize the Active From date with the Publish From date (Yes), or keep the Active From date (No) with the understanding that the item will not appear until the Publish From date has been reached.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.2 Manage Subscriptions – Modify a Subscription
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Closes the dialog box without changing the Active From date.	Portal.SubscriptionProperties.FromDatesMismatch.N o	
Yes	Closes the dialog box and changes the Active From date to be the same as the Publish From date. This only copies the date, it does not link the dates for future synchronization.		

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/05/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

5.29. Portal Management – Subscription Properties – Warning – To Dates Mismatch [Ph1]



General	Description
HelpID	Portal.SubscriptionProperties.ToDatesMismatch
Title	Warning – Active To date is later than Publish To date
Usage	Advises the user that the Active To date is earlier than the Publish To date, allowing them to synchronize the Active To date with the Publish To date (Yes), or keep the Active To date (No) with the understanding that the item will not appear until the Publish From date has been reached.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.2 Manage Subscriptions – Modify a Subscription
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Closes the dialog box without changing the Active To date.	Portal.SubscriptionProperties.ToDatesMismatch.No	
Yes	Closes the dialog box and changes the Active To date to be the same as the Publish To date. This only copies the date, it does not link the dates for future synchronization.	Portal.SubscriptionProperties.ToDatesMismatch.Yes	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/05/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

5.30. Portal Management – Subscription Properties – Delete Confirmation [Ph1]



General	Description
HelpID	Portal.SubscriptionProperties.DeleteConfirmation
Title	Delete Confirmation
Usage	Allows the user to either continue deleting the subscription from the Portal Menu or Subscription Properties DE form (Yes), or terminate deleting the folder (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.4 Manage Subscriptions – Delete Subscription
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the subscription. If the dialog box was opened from the Subscription Properties window, the user is returned to that window. If the dialog box was opened from the Site Map, the user is returned to the Site Map.	Portal.SubscriptionProperties.DeleteConfirmation.No	
Yes	Continues deleting the subscription, and returns the user to the Site Map .	Portal.SubscriptionProperties.DeleteConfirmation.Ye s.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/01/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

5.31. Portal Management – Subscription Properties – Auto-subscription Confirmation [Ph1]



General	Description
HelpID	Portal.SubscriptionProperties.AutosubscriptionConfirmation
Title	Warning – Auto-subscription Confirmation!
Usage	Advises the user that the entire contents of the selected TreeView branch on the Publications listing will be displayed on the portal without further action required. This window only appears when the record is first saved.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Yes
Related Use Cases	6.3 Manage Subscriptions Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	· · · · · · · · · · · · · · · · · · ·	Portal.SubscriptionProperties.AutosubscriptionConfirmation.No	
Yes	Continues saving the Auto-subscription Properties .	Portal.SubscriptionProperties.AutosubscriptionConfirmation.Yes	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/02/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

6. Portal Management - Use Cases

6.1. Manage Portals Use Cases

6.1.1. Manage Portals – Create Portal [Ph1]

Goal in Context	Create a new portal for presentation on the portal site of an organization.
Scope & Level	Portal Creation.
Preconditions	General Portal Settings have been set up. The user has the appropriate security clearance for creating new portals (same as creating a matter, only the site type is unique for portals). The user has logged into a site that is of the default portal site type.
Success End Condition	The portal is created and can be accessed from the portal Web site.
Failed End Condition	This portal is not created.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to create a new portal.

STEPS

- 1. Choose New Matter.
- **2.** The **Intake Wizard** appears in the following state:
 - **a.** The **Site Type** is that of the active site, which should be the same as the default site type for portals.
 - **b.** The **Site** is that of the active site.
 - **c.** The **Creator** is the current user.
 - **d.** The **Date Created** is the current system date and time.
 - e. The Type field is null.
- **3.** Choose a **Type** applicable for portals.
- 4. The Portal_Intake OCX is loaded in the frame.
- 5. Indicate whether you want to Enable billing and timeslip functionality for this portal.
 - a. If the user checks this box, the General Billing Information page and Timeslip tab appear for the portal. The user can elect to uncheck this box on the General Profile page to disable billing and timeslips.
 - b. If the user does not check this box, the General Billing Information page and Timeslip tab do not appear for the portal. The user can elect to check this box on the General Profile page to enable billing and timeslips.
- 6. Click OK.
- 7. The Portal Properties window appears in the following state:
 - a. The General tab is in focus, and the Profile page active.
 - b. All fields are null except the Type field with is populated with the value from the Intake Wizard.
 - **c.** The cursor is posited in the **Title** field.

- 8. Complete the fields on the form.
- **9.** Choose **Save**, switch focus to another page or tab, or choose **Close** and reply **Yes** when prompted about unsaved changes existing. All portal information is saved/updated.
- **10.** Maintain the following for the portal:
 - a. Options

- b. Billing Information
- c. Presentation
- d. Supporting Pages
- e. Subscriptions
- 11. Create/Assign the following items for the portal:
 - a. Matters (through Tree View)
 - **b.** Entities (through the listing or Tree View)
 - **c.** Documents (through the listing or Tree View)
 - **d.** Timeslips (through the listing or Tree View)
 - e. Notes (through the listing or Tree View)
 - f. Groupware (through the listing or Tree View not available for posting on portals)
 - g. Isssues (through the listing or Tree View not available for posting on portals)
 - **h.** Workflow (through the listing or Tree View)
 - i. Security (through the listing only applicable if Matter Security is enabled used to determine who can access a portal)
- **12.** When finished, **Close** the portal.

EXTENSION - UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Portal Properties window without saving or discarding the changes.

EXTENSION - PORTAL NOT ACTIVE

Upon saving, if the portal is not active, a dialog box appears.

- 1. Click Yes keep the folder portal, and continue saving the record or closing the window.
- 2. Clicking **No** returns the user to the **Portal Properties** window without saving the changes or closing the window. The user can then activate the portal.

EXTENSION – LABEL NOT UNIQUE

Upon saving, if the portal Label is not unique, a dialog box appears.

1. Click **OK** return to the the **Portal Properties** window without saving the changes or closing the window. The user can then entered a unique **Label**.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.

3. The user can then enter the appropriate information and then attempt to save the record again.

RELATED INFORMATION

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	None
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	Practice Manager matter management functionality is inherited by the form. 6.1 Manage Portals Use Cases
Subordinates	6.1.1 Manage Portals – Create Portal 6.1.3 Manage Portals – Set Options for Portal 6.1.4 Manage Portals – Set Billing Options for Portal 6.1.5 Manage Portals – Define Presentation for Portal 6.1.6 Manage Portals – Define Supporting Pages for Portal 6.1.7 Manage Portals – Activate/Deactivate Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal

6.1.2. Manage Portals – Modify Portal [Ph1]

Goal in Context	Modify an existing portal.
Scope & Level	Portal Modification.
Preconditions	The portal exists.
	The user has the appropriate security clearance for listing and modifying existing portals (same as listing and modifying a matter, only the site type is unique for portals).
	The user has logged into a site that is of the default portal site type.
	The user has the Matter Listing displayed on the screen, filtered to show portals from the default portal site type.
Success End Condition	The portal is modifed.
Failed End Condition	The portal is not modifed.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to modify an existing portal.

Last Updated: 07/15/2003

STEPS

- 1. Highlight the portal matter and choose Open.
- 2. The Portal Properties DE form appears in the following state:
 - **a.** The fields are populated as they were when the portal was last saved.
 - b. The General tab is in focus, and the Profile page active.
 - **c.** The cursor is posited in the **Title** field.
- 3. Modify the fields on the form.
- **4.** Choose **Save**, switch focus to another page or tab, or choose **Close** and reply **Yes** when prompted about unsaved changes existing. All portal information is saved/updated.
- **5.** Maintain the following for the portal as needed:
 - a. Options
 - **b.** Billing Information
 - c. Presentation
 - d. Supporting Pages
 - e. Subscriptions
- **6.** Create/Assign the following items for the portal as needed:
 - a. Matters (through Tree View)
 - **b.** Entities (through the listing or Tree View)
 - **c.** Documents (through the listing or Tree View)
 - **d.** Timeslips (through the listing or Tree View)
 - e. Notes (through the listing or Tree View)
 - **f.** Groupware (through the listing or Tree View not available for posting on portals)
 - Isssues (through the listing or Tree View not available for posting on portals)
 - **h.** Workflow (through the listing or Tree View)
 - Security (through the listing only applicable if Matter Security is enabled used to determine who can access a portal)
- 7. When finished, Close the portal.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking **No** discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Portal Properties window without saving or discarding the changes.

EXTENSION - PORTAL NOT ACTIVE

Upon saving, if the portal is not active, a dialog box appears.

- 1. Click Yes keep the folder portal, and continue saving the record or closing the window.
- 2. Clicking **No** returns the user to the **Portal Properties** window without saving the changes or closing the window. The user can then activate the portal.

EXTENSION – LABEL NOT UNIQUE

Upon saving, if the portal Label is not unique, a dialog box appears.

 Click OK return to the the Portal Properties window without saving the changes or closing the window. The user can then entered a unique Label.

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EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	None
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	Practice Manager matter management functionality is inherited by the form. 6.1 Manage Portals Use Cases
Subordinates	6.1.1 Manage Portals – Create Portal 6.1.3 Manage Portals – Set Options for Portal 6.1.4 Manage Portals – Set Billing Options for Portal 6.1.5 Manage Portals – Define Presentation for Portal 6.1.6 Manage Portals – Define Supporting Pages for Portal 6.1.7 Manage Portals – Activate/Deactivate Portal 6.1.2 Manage Portals – Modify Portal 6.1.8 Manage Portals – Close Portal

6.1.3. Manage Portals – Set Options for Portal [Ph1]

Goal in Context	Set options for the portal, describing the general rules for presentation, publication and subscription.
Scope & Level	Portal Creation or Modification – Set Options
Preconditions	The portal has been created.
	The user has the appropriate security clearance for creating new or modifying existing portals (same as creating or modifying a matter, only the site type is unique for portals).
	The user has logged into a site that is of the default portal site type.
	The portal is active.
Success End Condition	The portal options are saved.
Failed End Condition	The portal options are not saved.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to set options for a portal.

STEPS

- 1. Click Options.
- **2.** The DE form appears in the following state:
 - **a.** The fields are populated as they were when the portal was last saved. If creating a new portal, all fields are null.
 - **b.** The cursor is posited on the **Use Theme** option field.
- 3. Modify the fields on the form.
- **4.** Choose **Save**, switch focus to another page or tab, or choose **Close** and reply **Yes** when prompted about unsaved changes existing. All portal information is saved/updated.

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	None
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.

Superordinates	Practice Manager matter management functionality is inherited by the form.
	6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal
Subordinates	10.7.4 Manage Themes – Modify Existing Theme 12.1.1Select Portal 12.1.9 Select Portal Theme

6.1.4. Manage Portals – Set Billing Options for Portal [Ph1]

Goal in Context	Set billing options for the portal.
Scope & Level	Portal Creation or Modification – Set Billing Options
Preconditions	The portal has been created. The user has the appropriate security clearance for creating new or modifying existing portals (same as creating or modifying a matter, only the site type is unique for portals).
	The user has logged into a site that is of the default portal site type. The portal is active.
Success End Condition	The portal billing information is saved.
Failed End Condition	The portal billing information is not saved.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration, as well as the billing and timeslip option functionality.
Secondary Actors	None.
Trigger	The user chooses to set billing information for a portal.

STEPS

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- 1. Click Options.
- 2. The DE form appears in the following state:
 - **a.** The fields are populated as they were when the portal was last saved. If creating a new portal, all fields are null.
 - **b.** The cursor is posited on the **Use Theme** option field.
- 3. Choose the entity that is the Client/Billable entity for this portal.
- 4. Choose a Default Billing Matter.
 - **a.** If billing for work on this portal matter is to be recorded with the portal, then accept the default entry, which is the active portal matter.
 - **b.** If billing for work on this portal matter is to be recorded with a different matter, then select that matter. The matter must be a matter created for the selected **Client/Billable** entity.
- 5. Update the Fee Schedule information.
- **6.** Choose **Save**, switch focus to another page or tab, or choose **Close** and reply **Yes** when prompted about unsaved changes existing. All portal information is saved/updated.

Last Updated: 07/15/2003

RELATED INFORMATION

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	None
Open Issues	None
Due Date	Phase 1 – Not required Phase 2 – Not required. Phase 3 – Required.
Other Management Information.	None.
Superordinates	Practice Manager matter management functionality is inherited by the form. 6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal
Subordinates	Select Client/Billable entity and Select Matter are core Practice Manager functionality (beyond the scope of this FDS).
	Updating Fee Schedule information is core Practice Manager functionality (beyond the scope of this FDS).

6.1.5. Manage Portals – Define Presentation for Portal [Ph1]

Goal in Context	Set presentation options for the portal, including how the presentation for the home page and folder summary pages within the portal.
Scope & Level	Portal Creation or Modification – Set Presentation Options
Preconditions	The portal has been created.
	The user has the appropriate security clearance for creating new or modifying existing portals (same as creating or modifying a matter, only the site type is unique for portals).
	The user has logged into a site that is of the default portal site type.
	The portal is active.
Success End Condition	The portal presentation options are saved.
Failed End Condition	The portal presentation options are not saved.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to set presentation options for a portal.

STEPS

- 1. Click Presentation.
- 2. The DE form appears in the following state:
 - a. If Use Theme was selected on the Options page, all fields are populated with values from the selected theme, and the form is read-only.
 - b. If Use Custom Settings was selected on the Options page, the fields are populated as they were when the portal was last saved. If creating a new portal, all fields are null. All fields can be edited.
 - c. If creating a new portal and Copy Settings from Existing was selected on the Options page, the values from the portal or theme that was selcted for copy populate the field. All fields can be edited.
 - d. The cursor is posited on the Page Stype code field.
- 3. Modify the fields on the form.
- 4. Choose Save, switch focus to another page or tab, or choose Close and reply Yes when prompted about unsaved changes existing. All portal information is saved/updated.

RELATED INFORMATION

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	None
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	Practice Manager matter management functionality is inherited by the form. 6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal
Subordinates	10.4.4 Manage Footers – Modify Existing Footer 10.3.4 Manage Headers – Modify Existing Header 10.5.7 Manage Image Settings – Modify Existing Image 10.5.3 Manage Image Settings – Modify Existing Image Group 10.2.4 Manage Styles – Modify Existing Style 12.1.3 Select Portal Footer 12.1.4 Select Portal Header 12.1.5 Select Portal Image 12.1.6 Select Portal Image Group 12.1.7 Select Portal Style

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6.1.6. Manage Portals – Define Supporting Pages for Portal [Ph1]

Goal in Context	Defining supporting pages for the portal home page, and optionally, for the folder summary pages.
Scope & Level	Portal Creation or Modification – Define Supporting Pages
Preconditions	The portal has been created.
	The user has the appropriate security clearance for creating new or modifying existing portals (same as creating or modifying a matter, only the site type is unique for portals).
	The user has logged into a site that is of the default portal site type.
	The portal is active.
Success End Condition	The portal supporting page selections are saved.
Failed End Condition	The portal supporting page selections are not saved.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select supporting pages for a portal.

STEPS

- 1. Click Supporting Pages.
- 2. The DE form appears in the following state:
 - **a.** The fields are populated as they were when the portal was last saved. If creating a new portal, all fields are null.
 - **b.** The cursor is posited on the **HelpI Information** code field.
- 3. Modify the fields on the form.
- **4.** Choose **Save**, switch focus to another page or tab, or choose **Close** and reply **Yes** when prompted about unsaved changes existing. All portal information is saved/updated.

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	None
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.

Superordinates	Practice Manager matter management functionality is inherited by the form. 6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal
Subordinates	10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 12.1.8 Select Portal Supporting Pages

6.1.7. Manage Portals – Activate/Deactivate Portal [Ph1]

Goal in Context	Activating and deactivating a portal.
Scope & Level	If the portal is active, deactivating it is the use case. If the portal is deactivated, activating it is the use case.
Preconditions	The portal has been created. The user has the appropriate security clearance for creating new or modifying existing portals (same as creating or modifying a matter, only the site type is unique for portals). The user has logged into a site that is of the default portal site type. The portal is active. The portal is either active or deactivated.
Success End Condition	If deactivated, the portal is activated and available for viewing on the portal Web site. If active, the portal is deactivated and not available for viewing on the portal Web site.
Failed End Condition	If deactivated, the portal remains deactivated and is not available for viewing on the portal Web site. If active, the portal remains activated and is available for viewing on the portal Web site.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to activate or deactivate a portal.

ACTIVATE STEPS

There are seven conditions as to why a portal would be deactivated:

- 1. The **Deactivated** field on the **General Profile** page is checked.
 - **a.** To activate, uncheck this field, then save the portal.
- 2. The Active From date field on the General Profile page is null.
 - **a.** To activate, enter today's date or a date in the past, then save the portal.
- 3. The Active From date field on the General Profile page is in the future.
 - **a.** To activate, change the date to today's date or a date in the past, then save the portal.
- 4. The Active From date field on the General Profile page is linked to the Date Opened field, and that field is either null or contains a date in the future.
 - a. To activate, enter today's date or a date in the past in the Date Opened field, then save the portal.

- 5. The Active To date field on the General Profile page is in the past.
 - a. To activate, change the date to today's date, a date in the future or clear the Active To field, then save the portal.
- **6.** The **Active To** date field on the **General Profile** page is linked to the **Date Closed** field and it has a value that is in the past.
 - a. To activate, clear the **Date Closed** field or change it to today's date or a date in the future, then save the portal.
- 7. The Portal Status on the General Profile page is an Other- or Closed-type status...
 - a. To activate, change the **Status** to an **Open-type** status, then save the portal.

DEACTIVATE STEPS

There are six conditions as to why a portal would be activate:

- 1. The **Deactivated** field on the **General Profile** page is not checked.
 - **a.** To deactivate, check this field, then save the portal.
- 2. The Active From date field on the General Profile page is in the past.
 - a. To deactivate, clear the Active From date field or change the date to a date in the future, then save the portal.
- 3. The Active From date field on the General Profile page is linked to the Date Opened field, and that field contains a date in the past.
 - a. To deactivate, clear the Date Opened field or change the date to a date in the future, then save the portal.
- 4. The Active To date field on the General Profile page is in the future.
 - **a.** To deactivate, change the date to a date in the past, then save the portal.
- 5. The Active To date field on the General Profile page is linked to the Date Closed field and it is null or has a value that is in the future.
 - a. To deactivate, change the Date Closed field to a date in the past, then save the portal.
- 6. The Portal Status on the General Profile page is an Open-type status.
 - **a.** To deactivate, change the **Status** to an **Other-** or **Closed-type** status, then save the portal.

EXTENSION - DEACTIVATE CONFIRMATION

Upon saving a deactivated portal, the **Deactivate Confirmation** dialog box appears:

- 1. Clicking Yes proceeds with deactiving the portal.
- Clicking No returns the user to the Folder Properties DE form, where the portal can be activated using one of the Activation Steps.

Priority	High
Performance	< 1 minute for the experienced user.
Frequency	Depends on firms usage of portals.
Channels to Actors	None
Open Issues	None
Due Date	Phase 1 – Required.

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	Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	Practice Manager matter management functionality is inherited by the form. 6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal
Subordinates	None.

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6.1.8. Manage Portals – Close Portal [Ph1]

Goal in Context	Close an open portal.
Scope & Level	Portal Management – Close Portal.
Preconditions	The user has the appropriate security clearance for modifying existing portals (same as creating or modifying a matter, only the site type is unique for portals).
	The user has logged into a site that is of the default portal site type.
	The portal is active.
Success End Condition	The portal is closed and deactivated. Note that folders and subscriptions within the portal are no longer available because the portal is the parent folder, and if it can't be accessed, not can its contents. There records for the folders and subscriptions do not need to be updated.
Failed End Condition	The portal is not closed, or remains active.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to close a portal.

STEPS

- 1. Access the **General Profile** page of the portal.
- 2. Choose a Closed-type Status, and or enter a Date Closed.
- 3. Save the portal.
- 4. The **Deactivated** field is checked.

Priority	High
Performance	< 1 minute for the experienced user.
Frequency	Depends on firms usage of portals.
Channels to Actors	None

Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	Practice Manager matter management functionality is inherited by the form. 6.1 Manage Portals Use Cases 6.1.1 Manage Portals – Create Portal 6.1.2 Manage Portals – Modify Portal
Subordinates	None.

6.2. Manage the Portal Menu Use Cases

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6.2.1. Manage the Portal Menu – Create Folder [Ph1]

Goal in Context	Create a new folder for the portal menu.
Scope & Level	Folder Creation
Preconditions	The Portal Properties – General – Subscriptions – Portal Menu is active.
Success End Condition	The folder is created and can be accessed from portal on the portal Web site.
Failed End Condition	This folder is not created.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to create a new folder for the portal menu.

STEPS

- **1.** Choose Subscriptions.
- **2.** The **Subscriptions** page appears in the following state:
 - a. The Publications tab on the Available Items panel is in focus, with the tree collapsed.
 - **b.** The **Portal Menu** is collapsed to the top level Portal only.
 - **c.** Include deactived folder and subscriptions are not selected.
 - d. Focus is on the Publications tree.
 - e. The Copy (>) button is enabled.
 - f. The Remove (>) and Remove All (>>) buttons are disabled.
- **3.** Switch to the Portal Menu panel.
 - **a.** Expand tree branches by clicking on the plus ("+") signs.
 - **b.** Collapse the tree branches by clicking on the minus ("-") signs.
- 4. Highlight the folder into which you want to create the new folder.

- 5. Choose New.
 - a. On the Portal Menu toolbar, click the New icon.
 - b. Right-click on the selected (parent) folder, and choose Open from the short-cut menu.
 - c. Press Ctrl+O.
- 6. The Folder Properties window appears with the Profile tab active in the following state:
 - a. The Title, Summary, and Folder Label fields are null.
 - b. The Parent Folder field contains the Label and Title from the selected Parent Folder, which was selected before New was chosen.
 - C. The Active From and Active To fields are appropriately populated from the Portal Settings General tabs, as well as the Publication Properties DE form.
 - d. The Deactivated field is populated based on the selection on the Portal Properties General – Options page.
 - e. If All summary pages use home page presentation settings is selected on the Portal Properties – General – Options page, the Use the home page settings option is selected, and all other Summary Page Presentation Options are disabled.
 - f. If Allow summary page presentations to be customized is selected on the Portal Properties – General – Options page, the Use the home page settings option is selected, but all other Summary Page Presentation Options are still enabled.
 - g. The Close button is enabled.
 - h. The Delete and Save buttons are disabled.
 - The cursor is positioned in the **Title** field.
- 7. Complete the fields on the **Profile** page.
 - a. The Save button is enabled.
- Choose Save, and/or switch focus to the Presentation tab (all folder information is saved/updated).
- **9.** Maintain the following for the portal:
 - a. Presentation
 - b. Supporting Pages
- **10.** When finished, **Close** the folder.
- 11. The Portal Menu appears with the new folder added under the selected Parent Folder.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Folder Properties window without saving or discarding the changes.

EXTENSION - FOLDER NOT ACTIVE

Upon saving, if the folder is not active, a dialog box appears.

- 1. Click Yes keep the folder inactive, and continue saving the record or closing the window.
- 2. Clicking **No** returns the user to the **Folder Properties** window without saving the changes or closing the window. The user can then activate the folder.

EXTENSION – LABEL NOT UNIQUE

Upon saving, if the folder **Label** is not unique, a dialog box appears.

1. Click **OK** return to the **Folder Properties** window without saving the changes or closing the window. The user can then entered a unique Label.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- 3. The user can then enter the appropriate information and then attempt to save the record again.

RELATED INFORMATION

Priority	High
Performance	< 2 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	Portal Menu.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases
Subordinates	6.2.2 Manage the Portal Menu – Modify Folder 6.2.3 Manage the Portal Menu – Define Presentation for Folder 6.2.4 Manage the Portal Menu – Define Supporting Pages for Folder 6.2.5 Manage the Portal Menu – Activate/Deactivate Folder 6.2.6 Manage the Portal Menu – Copy Folder 6.2.8 Manage the Portal Menu – Delete Folder 10.7.4 Manage Themes – Modify Existing Theme 12.1.1 Select Portal 12.1.2 Select Portal Folder 12.1.9 Select Portal Theme

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6.2.2. Manage the Portal Menu – Modify Folder [Ph1]

Goal in Context	Modify and existing folder for the portal menu.
Scope & Level	Folder Modification
Preconditions	The Portal Properties – General – Subscriptions – Portal Menu is active.
Success End Condition	The folder is created and can be accessed from portal on the portal Web site.
Failed End Condition	This folder is not created.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to create a new folder for the portal menu.

STEPS

- 1. Highlight a folder.
- 2. Choose Open:
 - a. On the Portal Menu toolbar, click the Open icon.
 - **b.** Right-click on the folder, and choose **Open** from the short-cut menu.
 - c. Press Ctrl+O.
 - **d.** Double-click on the folder label.
- 3. The Folder Properties window appears with the Profile tab active in the following state:
 - a. All fields are populated with the values from when the folder was last saved.
 - b. The Delete and Close button are enabled.
 - c. The Save buttons is disabled.
 - d. The cursor is positioned in the Title field.
- Modify the fields in the Profile tab as needed.
 - **a.** Changing the **Parent Folder** is the same as moving the folder.
 - **b.** The **Save** button is enabled.
- 5. Choose Save, and/or switch focus to another tab (all folder information is saved/updated).
- **6.** Maintain the following for the portal:
 - a. Presentation
 - b. Supporting Pages
- 7. When finished, Close the folder.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Folder Properties window without saving or discarding the changes.

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EXTENSION - FOLDER NOT ACTIVE

Upon saving, if the folder is not active, a dialog box appears.

- 1. Click Yes keep the folder inactive, and continue saving the record or closing the window.
- 2. Clicking **No** returns the user to the **Folder Properties** window without saving the changes or closing the window. The user can then activate the folder.

EXTENSION - LABEL NOT UNIQUE

Upon saving, if the folder Label is not unique, a dialog box appears.

1. Click **OK** return to the the **Folder Properties** window without saving the changes or closing the window. The user can then entered a unique **Label**.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

Priority	High
Performance	< 2 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	Portal Menu.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.6 Manage the Portal Menu – Copy Folder
Subordinates	6.2.3 Manage the Portal Menu – Define Presentation for Folder 6.2.4 Manage the Portal Menu – Define Supporting Pages for Folder 6.2.5 Manage the Portal Menu – Activate/Deactivate Folder 6.2.8 Manage the Portal Menu – Delete Folder 10.7.4 Manage Themes – Modify Existing Theme 12.1.1 Select Portal 12.1.2 Select Portal Folder 12.1.9 Select Portal Theme

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6.2.3. Manage the Portal Menu – Define Presentation for Folder [Ph1]

Goal in Context	Set presentation options for the folder summary page.
Scope & Level	Folder Creation or Modification – Set Presentation Options
Preconditions	The Folder Properties DE form is active.
Success End Condition	The folder presentation options are saved.
Failed End Condition	The folder presentation options are not saved.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to set presentation options for a folder.

STEPS

- 1. Click Presentation.
- **2.** The DE form appears in the following state:
 - a. If Use home page settings is selected on the Profile page, all fields are read-only and populated with the values from the Portal Properties General Presentation page.
 - b. If Use parent folder settings is selected on the Profile page, all fields are read-only and populated with the values from the Folder Properties Presentation page of the parent folder.
 - **c.** If **Use theme** is selected on the **Profile** page, all fields are read-only and populated with the values from the selected theme.
 - d. If Use Custom Settings was selected on the Profile page, all fields are null.
 - **e.** If **Copy Settings from Existing** was selected on the **Profile** page, the values from the portal or theme that was selected for copy populate the field. All fields can be edited.
 - f. The **Image** is the default for the folder as determined from the **Portal Settings General** tabs, or uses the appropriate source (home page, parent folder, or theme).
 - a. The **Delete** and **Close** button are enabled.
 - h. The Save button is disabled.
 - i. The cursor is positioned in the Page Style code field if active.
- 3. Modify the fields on the form, if available.
- **4.** Choose **Save**, switch focus to another tab, or choose **Close** and reply **Yes** when prompted about unsaved changes existing. All portal information is saved/updated.

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	Folder Properties DE form.
Open Issues	None

Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder
Subordinates	10.4.4 Manage Footers – Modify Existing Footer 10.3.4 Manage Headers – Modify Existing Header 10.5.7 Manage Image Settings – Modify Existing Image 10.5.3 Manage Image Settings – Modify Existing Image Group 10.2.4 Manage Styles – Modify Existing Style 12.1.3 Select Portal Footer 12.1.4 Select Portal Header 12.1.5 Select Portal Image 12.1.6 Select Portal Image Group 12.1.7 Select Portal Style

6.2.4. Manage the Portal Menu – Define Supporting Pages for Folder [Ph1]

Goal in Context	Define supporting pages for the folder summary page.
Scope & Level	Folder Creation or Modifcation – Define Supporting Pages
Preconditions	The Folder Properties DE form is active.
Success End Condition	The folder supporting page selections are saved.
Failed End Condition	The folder supporting page selections are not saved.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to define supporting pages for a folder.

STEPS

- 1. Click Supporting Pages.
- **2.** The DE form appears in the following state:
 - a. If Use for all folder summary pages was selected for Help Information on the Portal Properties General Supporting Pages page, the Help Information field is read-only and populated with the selection from the Help Information field on the Portal Properties General Supporting Pages page.
 - b. If Use for all folder summary pages was selected for Copyright Statement on the Portal Properties General Supporting Pages page, the Copyright Statement field is read-only and populated with the selection from the Copyright Statement field on the Portal Properties General Supporting Pages page.
 - c. If Use for all folder summary pages was selected for Disclaimer Statement on the Portal Properties General Supporting Pages page, the Disclaimer Statement field is read-only and populated with the selection from the Disclaimer Statement field on the Portal Properties General Supporting Pages page.

- d. If Use for all folder summary pages was selected for Contact Information on the Portal Properties General Supporting Pages page, the Contact Information field is read-only and populated with the selection from the Contact Information field on the Portal Properties General Supporting Pages page.
- e. If Use for all folder summary pages was selected for Under Construction on the Portal Properties General Supporting Pages page, the Under Construction field is read-only and populated with the selection from the Under Construction field on the Portal Properties General Supporting Pages page.
- f. The Delete and Close button are enabled.
- g. The Save button is disabled.
- **h.** The cursor is positioned in the **Help Information** code field if active.
- 3. Modify the fields on the form, if available.
- Choose Save, switch focus to another tab, or choose Close and reply Yes when prompted about unsaved changes existing. All portal information is saved/updated.

Priority	High
Performance	< 5 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	Folder Properties DE form.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder
Subordinates	10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 12.1.8 Select Portal Supporting Pages

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6.2.5. Manage the Portal Menu – Activate/Deactivate Folder [Ph1]

Goal in Context	Activating and deactivating a folder.
Scope & Level	If the folder is active, deactivating it is the use case. If the folder is deactivated, activating it is the use case.
Preconditions	The folder has been created. The Portal Properties – General – Subscriptions – Portal Menu is active or the Folder Properties window is active. The folder is either active or deactivated.
Success End Condition	If deactivated, the folder is activated and available for viewing on the parent portal Web site. If active, the folder is deactivated and not available for viewing on the parent portal Web site.
Failed End Condition	If deactivated, the folder remains deactivated and is not available for viewing on the parent portal Web site. If active, the folder remains activated and is available for viewing on the parent portal Web site.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to activate or deactivate a folder.

ACTIVATION STEPS

There are four conditions as to why a folder would be deactivated:

- 1. The **Deactivated** field on the **Profile** page is checked.
 - a. To activate from the Portal Menu tree, highlight the folder click Activate on the Portal Menu tool bar.
 - **b.** To activate from the **Portal Menu** tree, right-click on the folder and choose **Activate** from the pop-up menu.
 - c. To activate from the Folder Properties DE form, uncheck this field, then save the folder.
- 2. The Active From date field on the Profile page is null.
 - a. To activate from the Folder Properties DE form, enter today's date or a date in the past, then save the folder.
- 3. The Active From date field on the Profile page is in the future.
 - **a.** To activate from the **Folder Properties** DE form, change the date to today's date or a date in the past, then save the folder.
- 4. The Active To date field on the Profile page is in the past.
 - **a.** To activate from the **Folder Properties** DE form, change the date to today's date, a date in the future, or clear the **Active To** field, then save the folder.

DEACTIVATION STEPS

There are three conditions as to why a folder would be activate:

- 1. The **Deactivated** field on the **Profile** page is not checked.
 - a. To deactivate from the Portal Menu tree, highlight the folder and click Deactivate on the Portal Menu tool bar.

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- **b.** To deactivate from the **Portal Menu** tree, right-click on the folder and choose **Deactivate** from the pop-up menu.
- c. To deactivate from the Folder Properties DE form, check this field, then save the folder.
- 2. The Active From date field on the Profile page is in the past.
 - **a.** To deactivate from the **Folder Properties** DE form, clear the **Active From** date field or change the date to a date in the future, then save the folder.
- **3.** The **Active To** date field on the **Profile** page is in the future.
 - a. To deactivate from the Folder Properties DE form, change the date to a date in the past, then save the folder.

EXTENSION – DEACTIVATE CONFIRMATION

Upon saving a deactivated folder, the **Deactivate Confirmation** dialog box appears:

- 1. Clicking Yes proceeds with deactiving the folder.
- Clicking No returns the user to the Folder Properties DE form, where the folder can be activated using one of the Activation Steps.

Priority	High
Performance	< 1 minute for the experienced user.
Frequency	Depends on firms usage of portals.
Channels to Actors	Portal Menu. Folder Properties DE form.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder
Subordinates	None.

6.2.6. Manage the Portal Menu – Copy Folder [Ph1]

Goal in Context	Create a new folder for the portal menu by copying an existing folder.
Scope & Level	Folder Creation via Copy.
Preconditions	The folder to be copied exists. The Portal Properties – General – Subscriptions – Portal Menu is active.
Success End Condition	The new folder is created based on the existing folder, and can be accessed from portal on the portal Web site.
Failed End Condition	This new folder is not created.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to copy and existing folder for the portal menu.

STEPS - METHOD 1

- 1. Highlight the folder to be copied.
- 2. Choose Copy:
 - a. On the Portal Menu toolbar, click the Copy icon.
 - **b.** Right-click on the **Portal Menu** tree, and choose **Copy** from the short-cut menu.
 - c. Press Ctrl+C.
- 3. Highlight a different folder into which to place the copy of the original folder.
- 4. Choose Paste:
 - a. On the Portal Menu toolbar, click the Paste icon.
 - b. Right-click on the Portal Menu tree, and choose Paste from the short-cut menu.
 - c. Press Ctrl+V.
- **5.** The **Paste What** dialog box appears in the following state:
 - **a.** Just the folder is selected and in focus.
 - **b.** The **OK** and **Cancel** buttons are enabled.
- **6.** Choose the scope of copying to be carried out:
 - a. To just copy the folder, choose Just the folder.
 - b. To copy the folder structure, choose The folder and all subfolders within the branch.
 - c. To copy the entire branch, including subscriptions, choose The folder, all subfolders and all subscriptions within the branch.
- 7. Click **OK**. The folder is copied to the new parent folder with the selected scope.

STEPS - METHOD 2 - DRAG'N'DROP

- 1. Highlight the folder to be copied.
- 2. Hold the Control button down.
- **3.** Drag a copy of the folder to the new parent folder.
- **4.** The **Paste What** dialog box appears in the following state:
 - a. Just the folder is selected and in focus.

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- b. The OK and Cancel buttons are enabled.
- 5. Choose the scope of copying to be carried out:
 - a. To just copy the folder, choose Just the folder.
 - $\textbf{b.} \quad \text{To copy the folder structure, choose \textbf{The folder and all subfolders within the branch}.}$
 - C. To copy the entire branch, including subscriptions, choose The folder, all subfolders and all subscriptions within the branch.
- **6.** Click **OK**. The folder is copied to the new parent folder with the selected scope.

RELATED INFORMATION

Priority	High
Performance	< 2 minutes for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	Portal Menu.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder
Subordinates	None.

6.2.7. Manage the Portal Menu – Move a Folder [Ph1]

Goal in Context	Move an existing folder and its contents from one parent folder to another.
Scope & Level	Move folder
Preconditions	The folder to be moved exists. The Portal Properties – General – Subscriptions – Portal Menu is active.
Success End Condition	The folder is moved to the new parent folder.
Failed End Condition	This folder is not moved, and remains within the current parent folder.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to copy and existing folder for the portal menu.

STEPS - METHOD 1

- **1.** Highlight the folder to be moved.
- 2. Choose Cut:
 - a. On the Portal Menu toolbar, click the Cut icon.
 - **b.** Right-click on the **Portal Menu** tree, and choose **Cut** from the short-cut menu.

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- c. Press Ctrl+X.
- **3.** Highlight a different folder into which to move the original folder.
- 4. Choose Paste:
 - a. On the Portal Menu toolbar, click the Paste icon.
 - **b.** Right-click on the **Portal Menu** tree, and choose **Paste** from the short-cut menu.
 - c. Press Ctrl+V.
- **5.** The folder is moved from the original parent folder to the new one.

STEPS - METHOD 2

- **1.** Highlight the folder to be moved.
- 2. Choose Open.
- **3.** The **Folder Properties** dialog box appears in the following state:
 - a. The fields are populated with the data from the last time the folder was saved.
 - **b.** The **Delete** and **Close** buttons are enabled.
 - c. The Save button is disabled.
 - **d.** The cursor is positioned in the **Title** field.
- 4. Select a new Parent Folder.
 - a. The Save button is enabled.
- 5. Choose Save, and/or switch focus to another tab (all folder information is saved/updated).
- **6.** The folder is moved from the original parent folder to the new one.

STEPS - METHOD 3 - DRAG'N'DROP

- 1. Highlight the folder to be moved.
- **2.** Drag a the folder to the new parent folder.
- 3. The folder is moved from the original parent folder to the new one.

RELATED INFORMATION

Priority	High
Performance	< 1 minute for an experienced user
Frequency	Depends on firms usage of portals.
Channels to Actors	Portal Menu. Folder Properties DE form.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.

Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder
Subordinates	None.

6.2.8. Manage the Portal Menu – Delete Folder [Ph1]

Goal in Context	Delete an existing folder.
Scope & Level	Manage the Portal Menu – Delete Folder
Preconditions	The folder to be deleted exists. The Portal Properties – General – Subscriptions – Portal Menu is active.
Success End Condition	The folder and its contents, including subscriptions, are deleted.
Failed End Condition	The folder and its contents, including subscriptions, are not deleted.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	Use chooses to delete an existing folder.

STEPS - METHOD 1 (DELETE FROM PORTAL MENU)

- 1. Highlight the folder to be deleted.
- 2. Choose Delete.
 - a. On the Portal Menu toolbar, click the Delete icon (trash can).
 - b. Right-click on the folder to be deleted, and choose **Delete** from the short-cut menu.
 - c. Press Ctrl+D.
- **3.** A dialog box appears.
 - a. To delete the folder, click Yes. The dialog box closes and the folder is deleted.
 - b. To keep the folder, click No. The dialog box closes, and the folder remains on the tree.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- **4.** Highlight the folder to be deleted.
- 5. Choose Open.
 - a. On the Portal Menu toolbar, click the Open icon.
 - b. Right-click on the Portal Menu tree, and choose Open from the short-cut menu.
 - c. Press Ctrl+O.
 - **d.** Double-click on the folder label.
- **6.** The **Folder Properties** DE form appears in the following state:
 - **a.** The fields are populated with the data from the last time the folder was saved.
 - **b.** The **Delete** and **Close** buttons are enabled.

- **c.** The **Save** button is disabled.
- d. The cursor is positioned in the Title field.
- 7. Choose Delete.
- 8. A dialog box appears.
 - a. To delete the folder, click Yes. The dialog box and DE form close. The folder is deleted, and the Portal Menu appears.

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b. To keep the folder, click **No**. The dialog box closes, and the **Folder Properties** DE form remains open.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Portal Menu. Folder Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder
Subordinates	None.

6.2.9. Manage the Portal Menu – Filter the Menu [Ph3]

Goal in Context	Filter the Portal Menu by folder or subscription properties.
Scope & Level	Manage the Portal Menu – Filter
Preconditions	The Portal Properties – General – Subscriptions – Portal Menu is active.
Success End Condition	The menu is filtered using the criteria entered.
Failed End Condition	The menu remains in the state it was in when the filter option was selected.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	Use chooses to filter the Portal Menu .

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STEPS - APPLYING A FILTER

- 1. Choose Filter.
 - a. On the Portal Menu toolbar, click the Filter icon.
 - b. Right-click on the Portal Menu tree, and choose Filter from the short-cut menu.
- 2. The Portal Menu Filter window appears in the following state:
 - a. If this is the first time the Portal Menu Filter was accessed during this session, the Do Not Filter Folder and Do Not Filter Subscriptions are selected, and all other fields are disabled.
 - **b.** If this is not the first time the **Portal Menu Filter** was accessed during this session, the existing filter criteria populates the fields. This may be from a previously applied filter, or the values selected on the active assignment tab.
 - c. All buttons are enabled.
- 3. To filter the folders, choose Filter Folders by, and then enter the filter criteria for filtering.
- To filter the subscriptions, choose Filter Subscriptions by, and then enter the filter criteria for filtering.
- 5. Click Apply.
- 6. The Portal Menu appears filtered using the criteria entered.

Steps - Clearing Previously Applied Filtering - Method 1

- 7. Choose Clear Filter:
 - a. On the Portal Menu toolbar, click the Clear Filter icon.
 - **b.** Right-click on the **Portal Menu** tree, and choose **Clear Filter** from the short-cut menu.
- **8.** The **Portal Menu** is refreshed and all filtering is removed.

Steps - Clearing Previously Applied Filtering - Method 2

- 1. Choose Filter.
 - a. On the Portal Menu toolbar, click the Filter icon.
 - b. Right-click on the Portal Menu tree, and choose Filter from the short-cut menu.
- 2. The Portal Menu Filter window appears in the following state:
 - **a.** Existing filter criteria populates the fields. This may be from a previously applied filter, or the values selected on the active assignment tab.
 - **b.** All buttons are enabled.
- 3. Click Clear.
 - a. Existing filter criteria is removed.
 - b. Do Not Filter Folder and Do Not Filter Subscriptions are selected, and all other fields are disabled.
- 4. Click Apply.
- **5.** The **Portal Menu** is refreshed and all filtering is removed.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Portal Menu. Folder Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.
Other Management Information.	N/A
Superordinates	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder
Subordinates	None.

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6.3. Manage Subscriptions Use Cases

6.3.1. Manage Subscriptions – Subscribe to a Publication [Ph1]

Goal in Context	Subscribe to a published item.
Scope & Level	Subscribe to a published item, which includes selecting the portal on which to subscribe, selecting an existing or creating a new folder in which to place the item, and set parameters for how long the item can display.
Preconditions	The item being subscribed to is existing.
	The item being subscribed to active.
	The portal and/or folder in which the subscription is to appear is existing.
	The Portal Properties – General – Subscriptions – Available Items panel s active and/or The Portal Properties – General – Subscriptions – Site Menu panel is active or
	The Publication Properties DE form is active on the Portals tab.
Success End Condition	The subscription record is created and/or updated.
Failed End Condition	The subscription record was not created and/or updated.
Primary Actors	Intermediate to advanced users responsible for publishing items that can be made available for subscription on portals.
Secondary Actors	None
Trigger	The user wants to subscribe to an publish existing item so that it can be used on a portal.

Steps – Method 1 (from the Portal Properties – Subscriptions – Available Items panel)

- Highlight the item in the Available Item panel on either the Publications Tree or the Weblinks listing.
- 2. Copy the item from Available Items panel to the Portal Menu panel.
 - a. Drag the item from the **Available Items** panel to a folder on the **Portal Menu** panel.
 - b. Highlight a folder on the Portal Menu panel, and click Copy (>).
 - **c.** Highlight a folder on the **Portal Menu** panel, hold the **Control** key down, click on additional folders, and then click **Copy** (>).
- **3.** The **Subscription Properties** window appears in the following state:
 - **a.** The field set is specific for the type of item selected Weblink, matter, entity, document, note, workflow or timeslip.
 - **b.** For a published item:
 - The Title of the publication appears in the Publication Source field. The Lookup and Open buttons are enabled.
 - ii. Link Title and Summary to Publication Information is selected.
 - iii. The Title, Summary, and Image fields contain the values from the publication.
 - iv. The Active From and Active To fields are appropriately populated based on the settings from the Portal Settings – General tab for the selected item type, as well as the publication.
 - **c.** For a publication tree branch:
 - i. Link Title and Summary to Publication Information is selected.
 - ii. Use the following is disabled.
 - iii. The Title and Summary fields are read-only, and null.
 - iv. The Image field is populated with the default from the **Portal Settings General** tab for the selected branch type.
 - V. The Active From and Active To fields are appropriately populated based on the settings from the Portal Settings General tab for the selected branch type.
 - **d.** If a single folder is selected:
 - i. The Label and Title populate the Parent Folder field.
 - The Lookup and Open buttons are enabled.
 - e. If more than one folder is selected:
 - **i.** All selected folders are listed in the Parent Folder fields, separated by forward slashes ("/").
 - ii. The Lookup button is enabled.
 - iii. The Open button is disabled.
 - f. The Deactivated field is populated based on the selection on the Portal Properties General – Options page.
 - g. The Close button is enabled.
 - h. The Delete and Save buttons are disabled.
- 4. Complete the fields on the form.

- 5. Choose Save, or Close and reply Yes when prompted about unsaved changes existing. All portal information is saved:
 - **a.** If more than one **Parent Folder** was selected, a separate subscription was created for each. As long as the form remains open, any changes will apply to those subscriptions. Once the form is closed, each subscription will have to be edited individually.
- **6.** When finished, choose **Close**. The subscription is added to the portal menu in the selected folders.

STEPS – METHOD 2 (FROM THE PORTAL PROPERTIES – SUBSCRIPTIONS – PORTAL MENU PANEL)

1. Choose New:

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- a. On the Portal Menu toolbar, click the New icon.
- b. Right-click on the Portal Menu tree, and choose New from the short-cut menu.
- c. Press Ctrl+N.
- 2. The Subscription Properties window appears in the following state:
 - a. The only field visible is the Publication Source field.
 - **b.** The **Publication Source** lookup button is in focus.
 - c. The Close button is enabled.
 - **d.** The **Delete** and **Save** buttons are disabled.
- 3. Click on the **Publication Source** lookup button.
- 4. The Select Publication window appears.
- **5.** Highlight a publication, and click **Select**.
- **6.** The **Subscription Properties** window returns in the following state:
 - **a.** The field set is added as appropriate for the selected publication type.
 - b. The Title of the publication appears in the Publication Source field. The Lookup and Open buttons are enabled.
 - c. Link Title and Summary to Publication Information is selected.
 - **d.** The **Title**, **Summary**, and **Image** fields contain the values from the publication.
 - e. The Active From and Active To fields are appropriately populated based on the settings from the Portal Settings General tab for the selected item type, as well as the publication.
 - **f.** The **Deactivated** field is populated based on the selection on the **Portal Properties – General Options** page.
- 7. Complete the fields on the form.
- 8. Choose Save, or Close and reply Yes when prompted about unsaved changes existing. All portal information is saved:
- 9. When finished, choose Close. The subscription is added to the portal in the selected folder.

STEPS – METHOD 3 (FROM THE PUBLICATION PROPERTIES – PORTALS TAB – ASSIGNED PORTALS PANEL)

- 1. In the Assigned Portals panel, highlight the portal on which to place the subscription.
- 2. Choose Subscribe.
 - a. Click on the Subscribe button.
 - **b.** Right-click on the selected portal, and choose **Subscribe** from the short-cut menu.

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- The Subscription Properties window appears in the following state:a. The field set is appropriate for the selected publication type.
 - **b.** The **Title** of the publication appears in the **Publication Source** field. The **Lookup** and
 - c. Link Title and Summary to Publication Information is selected.
 - **d.** The **Title**, **Summary**, and **Image** fields contain the values from the publication.
 - e. The Active From and Active To fields are appropriately populated based on the settings from the Portal Settings General tab for the selected item type, as well as the publication.
 - The Deactivated field is populated based on the selection on the Portal Properties General – Options page.
- **4.** Complete the fields on the form.

Open buttons are enabled.

- 5. Choose Save, or Close and reply Yes when prompted about unsaved changes existing. All portal information is saved:
- **6.** When finished, choose **Close**. The subscription is added to the portal in the selected Parent Folder. The **Publication Properties** DE form appears on the **Portals** tab.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- **2.** Clicking **No** discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Subscription Properties window without saving or discarding the changes.

EXTENSION - PUBLICATION NOT ACTIVE

Upon selecting a publication, if it is not active, a dialog box appears.

- If the dialog was opened from the Portal Properties General Subscriptions page, click OK return Available Items panel, where the user select another publication or modify the publication so that it is active.
- 2. If the dialog was opened from the **Select Publications** window, click **OK** return that window and select another publication or modify the publication so that it is active.
- 3. If the dialog was opened from the **Subscription Properties** window, click **OK** return that window and select another publication or modify the publication so that it is active.

EXTENSION - ACTIVE FROM DATE OUT-OF-SYNC

Upon saving, validate the **Active From** date of the subscription against the **Publish From** date of the publication. If the **Active From** date is earlier than the **Publish From** date, display a dialog box.

- 1. Click Yes to link the Active From date to be the Publish From date.
- 2. Click No to keep the current Active From date.

EXTENSION – ACTIVE TO DATE OUT-OF-SYNC

Upon saving, validate the **Active To** date of the subscription against the **Publish To** date of the publication. If the **Active To** date is later than the **Publish To** date, display a dialog box.

- 1. Click Yes to link the Active To date to be the Publish To date.
- 2. Click No to keep the current Active To date.

EXTENSION – AUTO-SUBSCRIPTION CONFIRMATION

If the subscription source is a branch on the **Publications** tree and not a specific publications, display a dialog box.

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- 1. Click I Understand to proceed with creating the auto-subsciption.
- 2. Click Cancel to terminate auto-subscribing to the branch, and close the dialog box and Subscription Properties window.

RELATED INFORMATION

Priority	High.
Performance	Fast.
Frequency	Frequency is determined by the extent to which firms use portals.
Open Issues	None.
Due Date	With Chimborazo
Other Management Information.	n/a
Superordinates	6.1 Manage Portals Use Cases 6.2 Manage the Portal Menu Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 10.8 Manage Publications Use Cases
Subordinates	6.2.2 Manage the Portal Menu – Modify Folder 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription 8.1.2 Publishing Items – Modify Existing Publication 10.5.7 Manage Image Settings – Modify Existing Image 12.1.2 Select Portal Folder 12.1.5 Select Portal Image 12.1.10 Select Publication

6.3.2. Manage Subscriptions – Modify a Subscription [Ph1]

Goal in Context	Modify an existing subscription.
Scope & Level	Modify an existing subscription.
Preconditions	The subscription to be modified is existing. The Portal Properties – General – Subscriptions – Site Menu panel is active.
Success End Condition	The subscription record is updated.
Failed End Condition	The subscription record was not updated.
Primary Actors	Intermediate to advanced users responsible for publishing items that can be made available for subscription on portals.
Secondary Actors	None
Trigger	The user wants to modify an existing subscription.

STEPS

- 1. Highlight the subscription in the **Portal Menu** panel.
- 2. Choose Open:
 - a. On the Portal Menu toolbar, and click Open.
 - **b.** Right-click on the subscription, and choose **Open** from the pop-up menu.
 - c. Press Ctrl+O.
 - d. Double-click on the subscription.
- 3. The Subscription Properties window appears in the following state:
 - a. All fields are populated with data from the last time the subscription was saved.
 - **b.** The **Close** button is enabled.
 - c. The **Delete** and **Save** buttons are disabled.
- 4. Modify the fields on the form as needed.
- **5.** Choose **Save**, or **Close** and reply **Yes** when prompted about unsaved changes existing. All portal information is saved:
- 6. When finished, choose Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- **3.** Clicking **Cancel** returns the user to the **Subscription Properties** window without saving or discarding the changes.

EXTENSION - PUBLICATION NOT ACTIVE

Upon selecting a publication, if it is not active, a dialog box appears.

 If the dialog was opened from the Portal Properties – General – Subscriptions page, click OK return Available Items panel, where the user select another publication or modify the publication so that it is active.

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- 2. If the dialog was opened from the **Select Publications** window, click **OK** return that window and select another publication or modify the publication so that it is active.
- **3.** If the dialog was opened from the **Subscription Properties** window, click **OK** return that window and select another publication or modify the publication so that it is active.

EXTENSION - ACTIVE FROM DATE OUT-OF-SYNC

Upon saving, validate the **Active From** date of the subscription against the **Publish From** date of the publication. If the **Active From** date is earlier than the **Publish From** date, display a dialog box.

- 1. Click Yes to link the Active From date to be the Publish From date.
- 2. Click No to keep the current Active From date.

EXTENSION - ACTIVE TO DATE OUT-OF-SYNC

Upon saving, validate the **Active To** date of the subscription against the **Publish To** date of the publication. If the **Active To** date is later than the **Publish To** date, display a dialog box.

- 1. Click Yes to link the Active To date to be the Publish To date.
- 2. Click No to keep the current Active To date.

EXTENSION – AUTO-SUBSCRIPTION CONFIRMATION

If the subscription source is a branch on the **Publications** tree and not a specific publications, display a dialog box.

- 1. Click I Understand to proceed with creating the auto-subsciption.
- 2. Click Cancel to terminate auto-subscribing to the branch, and close the dialog box and Subscription Properties window.

RELATED INFORMATION

Priority	High.
Performance	Fast.
Frequency	Frequency is determined by the extent to which firms use portals.
Open Issues	None.
Due Date	With Chimborazo
Other Management Information.	n/a
Superordinates	6.1 Manage Portals Use Cases 6.2 Manage the Portal Menu Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 10.8 Manage Publications Use Cases
Subordinates	6.2.2 Manage the Portal Menu – Modify Folder 6.3.3 Manage Subscriptions – Deactivate/Activate Subscription 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription

8.1.2 Publishing Items – Modify Existing Publication 10.5.7 Manage Image Settings – Modify Existing Image 12.1.2 Select Portal Folder
12.1.5 Select Portal Image 12.1.10 Select Publication

6.3.3. Manage Subscriptions – Deactivate/Activate Subscription [Ph1]

Goal in Context	Activating and deactivating a subsciption.
Scope & Level	If the subscription is active, deactivating it is the use case. If the subscription is deactivated, activating it is the use case.
Preconditions	The subscription has been created. The Portal Properties – General – Subscriptions – Portal Menu is active or the Subscription Properties window is active. The subscription is either active or deactivated.
Success End Condition	If deactivated, the subscription is activated and available for viewing on the parent portal Web site. If active, the subscription is deactivated and not available for viewing on the parent portal Web site.
Failed End Condition	If deactivated, the subscription remains deactivated and is not available for viewing on the parent portal Web site. If active, the subscription remains activated and is available for viewing on the parent portal Web site.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to activate or deactivate a subsciption.

ACTIVATION STEPS

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There are four conditions as to why a subscription would be deactivated (note that the subscription may be active, but the supporting publication is not – activating a publication is addressed in 8.1.4 Publishing Items – Activate/Deactivate Publication):

- 1. The Deactivated field on the Subscription Properties DE form is checked.
 - a. To activate from the Portal Menu tree, highlight the subscription click Activate on the Portal Menu tool bar.
 - **b.** To activate from the **Portal Menu** tree, right-click on the subscription and choose **Activate** from the pop-up menu.
 - C. To activate from the Subscription Properties DE form, uncheck this field, then save the subsciption.
- 2. The Active From date field on the Subscription Properties DE form is null.
 - a. To activate from the Subscription Properties DE form, enter today's date or a date in the past, then save the subsciption.
- 3. The Active From date field on the Subscription Properties DE form is in the future.
 - **a.** To activate from the **Subscription Properties** DE form, change the date to today's date or a date in the past, then save the subsciption.

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- 4. The Active To date field on the Subscription Properties DE form is in the past.
 - a. To activate from the Subscription Properties DE form, change the date to today's date, a date in the future, or clear the Active To field, then save the subsciption.

DEACTIVATION STEPS

There are three conditions as to why a folder would be activate:

- 1. The Deactivated field on the Subscription Properties DE form is not checked.
 - a. To deactivate from the Portal Menu tree, highlight the subscription and click Deactivate on the Portal Menu tool bar.
 - **b.** To deactivate from the **Portal Menu** tree, right-click on the subscription and choose **Deactivate** from the pop-up menu.
 - C. To deactivate from the Subscription Properties DE form, check this field, then save the subsciption.
- 2. The Active From date field on the Subscription Properties DE form is in the past.
 - **a.** To deactivate from the **Subscription Properties** DE form, clear the **Active From** date field or change the date to a date in the future, then save the subsciption.
- 3. The Active To date field on the Subscription Properties DE form is in the future.
 - **a.** To deactivate from the **Subscription Properties** DE form, change the date to a date in the past, then save the subsciption.

RELATED INFORMATION

Priority	High
Performance	< 1 minute for the experienced user.
Frequency	Depends on firms usage of portals.
Channels to Actors	Portal Menu. Subscription Properties DE form.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	6.2 Manage the Portal Menu Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.2 Manage Subscriptions – Modify a Subscription
Subordinates	None.

6.3.4. Manage Subscriptions – Delete Subscription [Ph1]

Goal in Context	Delete an existing subscription.
Scope & Level	Manage the Portal Menu – Delete Subscription
Preconditions	The subscription to be deleted exists. The Portal Properties – General – Subscriptions – Portal Menu is active.
Success End Condition	The subscription is deleted.
Failed End Condition	The subscription is not deleted.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	Use chooses to delete an existing subscription.

STEPS - METHOD 1 (DELETE FROM PORTAL MENU)

- 1. Highlight the subscription to be deleted.
- 2. Choose Delete.
 - a. On the Portal Menu toolbar, click the Delete icon (trash can).
 - **b.** Right-click on the subscription to be deleted, and choose **Delete** from the short-cut menu.
 - c. Press Ctrl+D.
- 3. A dialog box appears.
 - a. To delete the subscription, click Yes. The dialog box closes and the subscription is deleted.
 - **b.** To keep the subscription, click **No**. The dialog box closes, and the subscription remains on the tree.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Highlight the subscription to be deleted.
- 2. Choose Open.
 - a. On the Portal Menu toolbar, click the Open icon.
 - **b.** Right-click on the subscription, and choose **Open** from the short-cut menu.
 - c. Press Ctrl+O.
 - d. Double-click on the subscription.
- 3. The Subscription Properties DE form appears in the following state:
 - **a.** The fields are populated with the data from the last time the folder was saved.
 - **b.** The **Delete** and **Close** buttons are enabled.
 - c. The Save button is disabled.
 - **d.** The cursor is positioned in the **Title** field.
- 4. Choose Delete.

- **5.** A dialog box appears.
 - a. To delete the subscription, click Yes. The dialog box and DE form close. The subscription is deleted, and the Portal Menu appears.
 - **b.** To keep the subscription, click **No**. The dialog box closes, and the **Subscription** Properties DE form remains open.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Portal Menu. Folder Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	6.2 Manage the Portal Menu Use Cases 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.2 Manage Subscriptions – Modify a Subscription
Subordinates	None.

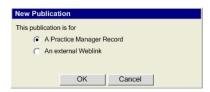
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Publications

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7. Publications – Mockups

7.1. Publication Properties – New [Ph1]



General	Description
HelpID	Portal.PublicationProperties.New
Title	New Publication
Usage	This dialog box appears when the user elects to create a new publication from a Publication Listing .
Туре	Modal Dialog Box
Open Focus	A Practice Manager Record
Tab Order	 An external Weblink OK Cancel A Practice Manager Record
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Buttons	Function / Action	HelpID	Hot Key
OK	If A Practice Manager Record is selected, the Select Source for Publication window appears.	Portal.PublicationProperties.New.OK	
	If An external Weblink is selected, the Publication Properties window appropriate for a Weblink appears with the Profile tab active.		
Cancel	Terminates creating the publication.	Portal.PublicationProperties.New.Cancel	

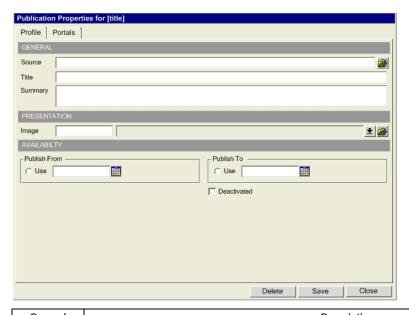
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
A Practice Manager Record	When selected, the publication is for a Practice Manager Record. Upon clicking OK, the Select Source for Publication window appears.	Option 1 of 2	Yes	n/a	n/a	Portal.PublicationPr operties.New.PM	
An external Weblink	When selected, the publication is for a Weblink. Upon clicking OK, the Publication Properties window appropriate for a Weblink appears with the Profile tab active.	Option 2 of 2	No	n/a	n/a	Portal.PublicationPr operties.New.Webli nk	

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Original Mockup.
			Final mockup for development review and coding.

Last Updated: 07/15/2003

7.2. Publication Properties – Profile – Weblink [Ph1]

Printed: 06/12/2018



General	Description
HelpID	Portal.PublicationProperties.Profile.Weblink
Title	Publication Properties for [title]
Usage	Defines a "statement of publication" that includes default values for title, summary and image, as well as publish from and to availibility. This form is specifically for Weblink publications, which are objects that are not based on Practice Manager records, as would be the case with a Web site or application.
Туре	Modal Multi-tab Window
Open Focus	Source
Tab Order	 Title Summary Image Publish From – Use Publish From – Use (date) Publish To – Use (lookup) Publish To – Use (date) Publish To – Use (lookup) Deactivated Delete Save Close Source

General	Description
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Publication Properties window. If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.	Portal.PublicationProperties.Profile.Weblink.Close	
Delete	Deletes the publication record, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No). Any subscription based on the publication are also deleted.	Portal.PublicationProperties.Profile.Weblink.Close	
Image – Lookup	Displays the Select Image window.	Portal.PublicationProperties.Profile.Weblink.Image.Lo okup	
Image – Open	Displays the Image Properties DE form for the selected image.	Portal.PublicationProperties.Profile.Weblink.Image.Open	
Publish From – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Weblink.PublishFrom.Lookup	
Publish To – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Weblink.PublishT o.Lookup	
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Profile.Weblink.Save	
Source – Open	Displays publication source using the appropriate application.	Portal.PublicationProperties.Profile.Weblink.Source. Open	

Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Web link.Deactivated	
This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Null	N	N	Portal.PublicationPr operties.Profile.Web link.Image	
This is the date from which the item is available for subscribing.	Date	Today's date	Y	Υ	Portal.PublicationPr operties.Profile.Web link.PublishFrom	
This is the date throuigh which the item is available for subscribing.	Date	Null	N	N	Portal.PublicationPr operties.Profile.Web link.PublishTo	
This is the source record that is being published. For weblinks, this is the URL of the page or application.	Text	Null	Y	Υ	Portal.PublicationPr operties.Profile.Web link.Source	
This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have	Text	Null	N	N	Portal.PublicationPr operties.Profile.Web link.DefaultSummar y	
	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated. This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images. This is the date from which the item is available for subscribing. This is the date throuigh which the item is available for subscribing. This is the source record that is being published. For weblinks, this is the URL of the page or application. This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated. This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images. This is the date from which the item is available for subscribing. This is the date throuigh which the item is available for subscribing. This is the source record that is being published. For weblinks, this is the URL of the page or application. This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and The publication and	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated. This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images. This is the date from which the item is available for subscribing. This is the source record that is being published. For weblinks, this is the URL of the page or application. This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated. This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. This is the date from which the item is available for subscribing. This is the date through which the item is available for subscribing. This is the source record that is being published. For weblinks, this is the URL of the page or application. This is the summary for the publication and It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription of the selected image. Today's date Y Today's date Y Null N Text Null Y Text Null N It is used on the Subscribe DE form as the default when it is first opened. The publication and	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item is deactivated. This is the image to use for the item. It is used on the Subscribe DE form as the default when it is available for subscribing. This is the date through which the item is available for subscribing. This is the source record that is being published. For weblinks, this is the URL of the page or application. It is used on the Subscribe DE form as the URL of the page or application. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images. Date Today's date Y Y Y Y Y Y Y Y Y Y Y Y Y	When checked, the Item is deactived and cannot be subscription however, are not removed, but the item is deactivated. This is the image to use for the item. It is used on the Subscribe DE form as the default when it is ravialable for subscribing. This is the date through which the item is available for subscribing. This is the date through which the item is available for subscribing. This is the source record that is being published. This is the source record that is being published. This is the summary for the publication. The publication and the item is available for subscribing. This is the summary for the publication. The publication and

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Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Title	This is the title for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different titles. The field should be prepopulated with the description of the item or, in the case of entity, with the name.	Text	Null	Y	Y	Portal.PublicationPr operties.Profile.Web link.DefaultTitle	

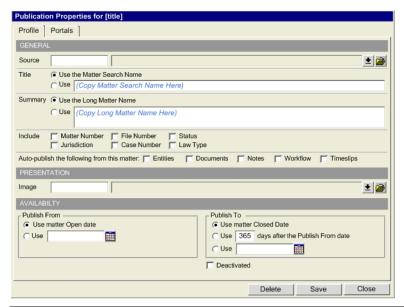
Special Rules and Clarifications

- 1. Both Available Portals and Assigned Portals listings should support multi-select, quick filtering, and drag'n'drop.
- 2. Upon saving, check the **Publish From** and **Publish To** dates against today's date. If the item is not available for publishing because today's date does not fall with the from-to date range, display a message, giving the user the option of returning to the window and changing either date (Yes), or continuing to close the window with the dates as they are (No).
- 3. If the item has already been published, publishing it again should bring up the existing publication record and assignments.

Rev No.	Rev Date	Rev By	Revision Description					
1.10	03/18/2002		Complete rework of mockups. Final mockup for development review and coding.					

Last Updated: 07/15/2003

7.3. Publication Properties – Profile – Matter [Ph1]



General	Description						
HelpID	Portal.PublicationProperties.Profile.Matter						
Title	Publication Properties for [title]						
Usage	Defines a "statement of publication" that includes default values for title, summary and image, as well as publish from and to availibility. This form is specifically for Matter publications.						
Туре	Modal Multi-tab Window						
Open Focus	Source Code						
Tab Order	 Source – Lookup Source – Open Title – Use the Matter Search Name Title – Use (text) Summary – Use the Matter Long Name Summary – Use Summary – Use (text) Include – Matter Number Include – File Number Include – Status Include – Jurisdiction Include – Case Number Include – Law Type Auto-publish the following from this matter – Entities Auto-publish the following from this matter – Workflow Auto-publish the following from this matter – Workflow Auto-publish the following from this matter – Timeslips Image – Code Image – Lookup 						

General	Description
	22. Image – Open 23. Publish From – Use matter Open Date 24. Publish From – Use (date) 25. Publish From – Use (lookup) 26. Publish To – Use matter Closed Date 27. Publish To – Use ### days after the Publish From date 28. Publish To – Use ### days after the Publish From date 29. Publish To – Use ### days after the Publish From date (number) 30. Publish To – Use 31. Publish To – Use (date) 32. Publish To – Use (lookup) 33. Deactivated 34. Delete 35. Save 36. Close 37. Source – Code
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Publication Properties window. If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.	Portal.PublicationProperties.Profile.Matter.Close	
Delete	Deletes the publication records, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No). Any subscription based on the publication are also deleted.	Portal.PublicationProperties.Profile.Matter.Close	
Image – Lookup	Displays the Select Image window.	Portal.PublicationProperties.Profile.Matter.Image.Loo kup	
Image – Open	Displays the Image Properties DE form for the selected image.	Portal.PublicationProperties.Profile.Matter.Image.Op en	
Publish From – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Matter.PublishFrom.Lookup	

Buttons	Function / Action	HelpID	Hot Key
Publish To – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Matter.PublishTo. Lookup	
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Profile.Matter.Save	
Source – Lookup	Displays the Select Source for Publication window, pre-filtered on matters.	Portal.PublicationProperties.Profile.Matter.Source.Lo okup	
Source – Open	Displays the Matter DE form for the source matter.	Portal.PublicationProperties.Profile.Matter.Source.Op en	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Auto-publish the following from this matter – Documents	When checked, any document created for the matter will be published (if not already published) using the publication rules from the Portal Settings – General – Documents tab.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Matt er.AutoPublish.Docu ments	
Auto-publish the following from this matter – Entities	When checked, any entity assigned to the matter will be published (if not already published) using the publication rules from the Portal Settings – General – Entities tab.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Matt er.AutoPublish.Entiti es	
Auto-publish the following from this matter – Notes	When checked, any note created for the matter will be published (if not already published) using the publication rules from the Portal Settings – General – Notes tab.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Matt er.AutoPublish.Note s	
Auto-publish the following from this matter – Timeslips	When checked, any timeslip created for the matter will be published (if not already published) using the publication rules from the Portal Settings – General – Timeslip tab.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Matt er.AutoPublish.Time slips	

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Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Auto-publish the following from this matter – Workflow	When checked, any workflow item created for the matter will be published (if not already published) using the publication rules from the Portal Settings – General – Workflow tab.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Matt er.AutoPublish.Work flow	
Deactivated	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated.	Checkbox		N	N	Portal.PublicationPr operties.Profile.Matt er.Deactivated	
Image	This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Use the default image from Portal Settings – General Matters.	N	N	Portal.PublicationPr operties.Profile.Matt er.DefaultImage	
Publish From – Use	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish From field.	Option 2 of 2 in the Publish From set.	Yes, if Use Today's Date or Leave Blank is selected in Portal Settings – General – Matters – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Matt er.PublishFrom.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish From – Use (date)	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. This is the date from which the publication is available for subscribing.	Date	If Use Matter Open Date is selected in Portal Settings – General – Matters – Publishing – From, pre-populate the field with the Matter Open Date. If Use Today's date is selected in Portal Settings – General – Matters – Publishing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Matters – Publishing – From, pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Matt er.PublishFrom.Dat e	
Publish From – Use Matter Open Date	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the Publish From date is linked to the Date Opened value from the source matter. That date appears in the Publish From date field, which is read only and cannot be changed without selecting the Use option.	Option 1 of 2 in the Publish From set.	Yes, if Use Matter Open Date is selected in Portal Settings – General – Matters – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Matt er.PublishFrom.Use MatterOpenDate	
Publish To – Use	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish To field.	Option 3 of 3 in the Publish To set.	Yes, if Leave Blank is selected in Portal Settings – General – Matters – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Matt er.PublishTo.Date	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish To – Use ### days after the Publish From Date	When selected, the Publish To date is calculated by taking the Publish From date and adding the number of days entered in this field.	Option 2 of 3 in the Publish To set.	Yes, if Use ### days after the Publish From Date is selected in Portal Settings – General – Matters – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Matt er.PublishTo.Numbe rofDays	
Publish To – Use ### days after the Publish From Date (number)	This is the number of days to add to the Publish From date in calculating the Publish To date.	Number	Use the value from the Use ### days after the Publish From Date number field in Portal Settings – General – Matters – Publishing – To.	N	N	Portal.PublicationPr operties.Profile.Matt er.PublishTo.Numbe rofDays.Number	
Publish To – Use (date)	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. This is the date through which the publication is available for subscribing.	Date	If Use Matter Closed Date is selected in Portal Settings – General – Matters – Publishing – To, pre-populate the field with the Matter Closed Date. If there is no Matter Closed Date, leave null.	Y	Y	Portal.PublicationPr operties.Profile.Matt er.PublishTo.Date	
			If Use ### days after the Publish From Date is selected, pre- populate the field with the results of adding the number entered to the Publish From date.				
			If Use Today's date is selected in Portal Settings – General – Matters – Publishing – To, pre-populate the field with today's date.				
			If Leave Blank is selected in Portal Settings – General – Matters – Publishing – To, do not pre-populate the field with a value.				

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish To – Use Matter Closed Date	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. When selected, the Publish To date is linked to the Date Closed value from the source matter. That date appears in the Publish To date field, which is read only and cannot be changed without selecting the Use option. If there is no Matter Closed Date, Publish To date field is null.	Option 1 of 3in the Publish From set.	Yes, if Use Matter Closed Date is selected in Portal Settings – General – Matters – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Matt er.PublishTo.Matter ClosedDate	
Source Code	This is the matter number of the source matter that is being published.	Text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Matt er.Source.Code	
Source Description	This is the matter search name of the source matter that is being published.	Text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Matt er.Source.Descriptio n	
Summary – Include – Case Number	When checked, the matter Case Number is included in the Summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Matter tab.	N	N	Portal.PublicationPr operties.Profile.Matt er.SummaryInclude. CaseNumber	
Summary – Include – File Number	When checked, the matter File Number is included in the Summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Matter tab.	N	N	Portal.PublicationPr operties.Profile.Matt er.SummaryInclude. FileNumber	
Summary – Include – Jurisdication	When checked, the matter Jurisdication description/name is included in the Summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Matter tab.	N	N	Portal.PublicationPr operties.Profile.Matt er.SummaryInclude. Jurisdication	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Include – Law Type	When checked, the matter Law Type is included in the Summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Matter tab.	N	N	Portal.PublicationPr operties.Profile.Matt er.SummaryInclude. LawType	
Summary – Include – Matter Number	When checked, the Matter Number is included in the Summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Matter tab.	N	N	Portal.PublicationPr operties.Profile.Matt er.SummaryInclude. MatterNumber	
Summary – Include – Status	When checked, the matter Status description is included in the Summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Matter tab.	N	N	Portal.PublicationPr operties.Profile.Matt er.SummaryInclude. Status	
Summary – Use	When this option is selected, the text in the Summary field will not be linked to the Long Matter Name of the published matter.	Option 2 of 2 in the Summary set.	No	N	N	Portal.PublicationPr operties.Profile.Matt er.Summary.Use	
Summary – Use the Long Matter Name	When this option is selected, the text in the Summary field will be linked to the Long Matter Name of the published matter.	Option 1 of 2 in the Summary set.	Yes	N	N	Portal.PublicationPr operties.Profile.Matt er.Summary.UseLo ngMatterName	
Summary (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the Long Matter Name is selected, this field contains the text from the Long Matter Name of the published matter, but is read-only and cannot be edited. If Use the Matter Search Name is not selected, this field is pre-populated with the Long Matter Name of the published matter, but is not linked and can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Matt er.Summary	

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Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Title – Use	When this option is selected, the text in the Summary field will not be linked to the Matter Search Name of the published matter.	Option 2 of 2 in the Title set.	No	N	N	Portal.PublicationPr operties.Profile.Matt er.Title.Use	
Title – Use the Matter Search Name	When this option is selected, the text in the Summary field will be linked to the Matter Search Name of the published matter.	Option 1 of 2 in the Title set.	Yes	N	N	Portal.PublicationPr operties.Profile.Matt er.Title.UseMatterS earchName	
Title (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the Matter Search Name is selected, this field contains the Matter Search Name of the published matter, but is read-only and cannot be edited. If Use the Matter Search Name is not selected, this field is pre-populated with the Matter Search Name of the published matter, but is not linked and can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Matt er.Title	

Special Rules and Clarifications

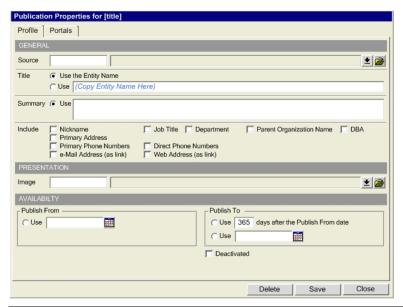
- 1. Both Available Portals and Assigned Portals listings should support multi-select, quick filtering, and drag'n'drop.
- 2. Upon saving, check the **Publish From** and **Publish To** dates against today's date. If the item is not available for publishing because today's date does not fall with the from-to date range, display a message, giving the user the option of returning to the window and changing either date (Yes), or continuing to close the window with the dates as they are (No).
- 3. If the item has already been published, publishing it again should bring up the existing publication record and assignments.

Rev No.	Rev Date	Rev By	Revision Description				
1.10	03/18/2002		Complete rework of mockups. Final mockup for development review and coding.				

Last Updated: 07/15/2003

7.4. Publication Properties – Profile – Entity [Ph1]

Printed: 06/12/2018



General	Description							
HelpID	Portal.PublicationProperties.Profile.Entity							
Title	Publication Properties for [title]							
Usage	Defines a "statement of publication" that includes default values for title, summary and image, as well as publish from and to availibility. This form is specifically for Entity publications.							
Туре	Modal Multi-tab Window							
Open Focus	Source Code							
Tab Order	 Source – Lookup Source – Open Title – Use the Entity Name Title – Use (text) Summary – Use Summary – Use (text) Summary – Include – Nickname Summary – Include – Department Summary – Include – Department Summary – Include – DBA Summary – Include – Primary Address Summary – Include – Primary Phone Numbers Summary – Include – Primary Phone Numbers Summary – Include – Primary Phone Numbers Summary – Include – Web Address Summary – Include – Web Address Image – Code Image – Lookup Image – Open Publish From – Use 							

Last Updated: 07/15/2003

General	Description
	 22. Publish From – Use (date) 23. Publish From – Use (lookup) 24. Publish To – Use ### days after the Publish From date 25. Publish To – Use ### days after the Publish From date (number) 26. Publish To – Use 27. Publish To – Use (date) 28. Publish To – Use (lookup) 29. Deactivated 30. Delete 31. Save 32. Close 33. Source – Code
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Publication Properties window. If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.	Portal.PublicationProperties.Profile.Entity.Close	
Delete	Deletes the publication records, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No). Any subscription based on the publication are also deleted.	Portal.PublicationProperties.Profile.Entity.Close	
Image – Lookup	Displays the Select Image window.	Portal.PublicationProperties.Profile.Entity.Image.Look up	
Image – Open	Displays the Image Properties DE form for the selected image.	Portal.PublicationProperties.Profile.Entity.Image.Ope	
Publish From – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Entity.PublishFrom.Lookup	
Publish To – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Entity.PublishTo. Lookup	

Buttons	Function / Action	HelpID	Hot Key
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Profile.Entity.Save	
Source – Lookup	Displays the Select Source for Publication window, pre-filtered on entities.	Portal.PublicationProperties.Profile.Entity.Source.Loo kup	
Source – Open	Displays the Entity DE form for the source entity.	Portal.PublicationProperties.Profile.Entity.Source.Op en	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Deactivated	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Entit y.Deactivated	
Image	This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Use the default image from Portal Settings – General Entities.	N	N	Portal.PublicationPr operties.Profile.Entit y.DefaultImage	
Publish From – Use	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish From field.	Option 2 of 2 in the Publish From set.	Yes, if Use Today's Date or Leave Blank is selected in Portal Settings – General – Entities – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Entit y.PublishFrom.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish From – Use (date)	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. This is the date from which the publication is available for subscribing.	Date	If Use Today's date is selected in Portal Settings – General – Entities – Publishing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Entities – Publishing – From, do not pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Entit y.PublishFrom.Date	
Publish To – Use	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish To field.	Option 3 of 3 in the Publish To set.	Yes, if Leave Blank is selected in Portal Settings – General – Entities – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Entit y.PublishTo.Date	
Publish To – Use ### days after the Publish From Date	When selected, the Publish To date is calculated by taking the Publish From date and adding the number of days entered in this field.	Option 2 of 3 in the Publish To set.	Yes, if Use ### days after the Publish From Date is selected in Portal Settings – General – Entities – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Entit y.PublishTo.Number ofDays	
Publish To – Use ### days after the Publish From Date (number)	This is the number of days to add to the Publish From date in calculating the Publish To date.	Number	Use the value from the Use ### days after the Publish From Date number field in Portal Settings – General – Entities – Publishing – To.	N	N	Portal.PublicationPr operties.Profile.Entit y.PublishTo.Number ofDays.Number	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish To – Use (date)	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. This is the date through which the publication is available for subscribing.	Date	If Use ### days after the Publish From Date is selected, pre- populate the field with the results of adding the number entered to the Publish From date. If Use Today's date is selected in Portal Settings – General – Entities – Publishing – To, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Entities – Publishing – To, do not pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Entit y.PublishTo.Date	
Source Code	This is the Entity Code of the source entity that is being published.	Text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Entit y.Source.Code	
Source Description	This is the Full Enttity Name of the source entity that is being published.	Text	Null	Y	Υ	Portal.PublicationPr operties.Profile.Entit y.Source.Descriptio n	
Summary – Include – DBA	When checked, the entity's DBA is included in the summary. This field is only available for organization entities on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. DBA	
Summary – Include – Department	When checked, the entity's Department is included in the summary. This field is only available for individual entities on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.I	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. Department	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Include – Direct Phone Numbers	When checked, the entity's Direct Phone Numbers are included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. DirectPhoneNumber s	
Summary – Include – e-Mail Address	When checked, the entity's e-Mail Address is included in the summary as a hyperlink.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude.e -MailAddress	
Summary – Include – Job Title	When checked, the entity's Job Title is included in the summary. This field is only available for individual entities on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude.J obTitle	
Summary – Include – Nickname	When checked, the entity's Nickname is included in the summary. This field is only available for individual entities on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. Nickname	
Summary – Include – Parent Organization Name	When checked, the entity's Parent Organization Name is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. ParentOrganization Name	
Summary – Include – Primary Address	When checked, the entity's Primary Address is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. PrimaryAddress	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Include – Primary Phone Numbers	When checked, the phones numbers from the entity's Primary Address are included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. PrimaryPhoneNumb ers	
Summary – Include – Web Page Address	When checked, the entity's Web Page Address is included in the summary as a hyperlink.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Entities tab.	N	N	Portal.PublicationPr operties.Profile.Entit y.SummaryInclude. WebPageAddress	
Summary – Use	This is the only option available for entity publications. There is no linking back to the published entity record.	Option 1 of 1 in the Summary set.	Yes	N	N	Portal.PublicationPr operties.Profile.Entit y.Summary.Use	
Summary (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Entit y.Summary	
Title – Use	When this option is selected, the text in the Summary field will not be linked to the Entity Name of the published entity.	Option 2 of 2 in the Title set.	No	N	N	Portal.PublicationPr operties.Profile.Entit y.Title.Use	
Title – Use the Entity Name	When this option is selected, the text in the Summary field will be linked to the Entity Name of the published entity.	Option 1 of 2 in the Title set.	Yes	N	N	Portal.PublicationPr operties.Profile.Entit y.Title.UseEntityNa me	

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Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Title (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the Entity Name is selected, this field contains the full Entity Name of the published entity, but is read- only and cannot be edited. If Use the Entity Name is not selected, this field is pre-populated with the full Entity Name of the published entity, but is not linked and can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Entit y.Title	

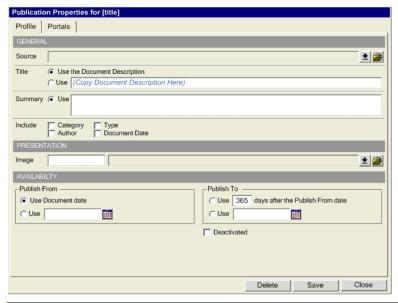
Special Rules and Clarifications

- 1. Both Available Portals and Assigned Portals listings should support multi-select, quick filtering, and drag'n'drop.
- 2. Upon saving, check the **Publish From** and **Publish To** dates against today's date. If the item is not available for publishing because today's date does not fall with the from-to date range, display a message, giving the user the option of returning to the window and changing either date (Yes), or continuing to close the window with the dates as they are (No).
- 3. If the item has already been published, publishing it again should bring up the existing publication record and assignments.

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002		Complete rework of mockups. Final mockup for development review and coding.

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7.5. Publication Properties – Profile – Document [Ph1]



General	Description
HelpID	Portal.PublicationProperties.Profile.Document
Title	Publication Properties for [title]
Usage	Defines a "statement of publication" that includes default values for title, summary and image, as well as publish from and to availibility. This form is specifically for Document publications.
Туре	Modal Multi-tab Window
Open Focus	Source – Lookup
Tab Order	 Source – Open Title – Use the Document Description Title – Use Title – Use (text) Summary – Use Summary – Use (text) Summary – Include – Category Summary – Include – Type Summary – Include – Author Summary – Include – Document Date Image – Code Image – Lookup Image – Lookup Image – Open Publish From – Use Document Date Publish From – Use Publish From – Use (date) Publish From – Use ### days after the Publish From date Publish To – Use ### days after the Publish From date (number) Publish To – Use Publish To – Use Publish To – Use

General	Description
	22. Publish To – Use (lookup)
	23. Deactivated
	24. Delete
	25. Save
	26. Close
	27. Source – Lookup
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Publication Properties window.	Portal.PublicationProperties.Profile.Document.Close	
	If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.		
Delete	Deletes the publication records, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No).	Portal.PublicationProperties.Profile.Document.Close	
	Any subscription based on the publication are also deleted.		
Image – Lookup	Displays the Select Image window.	Portal.PublicationProperties.Profile.Document.Image. Lookup	
Image – Open	Displays the Image Properties DE form for the selected image.	Portal.PublicationProperties.Profile.Document.Image. Open	
Publish From – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Document.Publis hFrom.Lookup	
Publish To – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Document.Publis hTo.Lookup	
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Profile.Document.Save	
Source – Lookup	Displays the Select Source for Publication window, pre-filtered on documents.	Portal.PublicationProperties.Profile.Document.Source .Lookup	

Buttons	Function / Action	HelpID	Hot Key
Source – Open	Displays the Document DE form for the source document.	Portal.PublicationProperties.Profile.Document.Source .Open	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Deactivated	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Doc ument.Deactivated	
Image	This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Use the default image from Portal Settings – General Documents.	N	N	Portal.PublicationPr operties.Profile.Doc ument.DefaultImage	
Publish From – Use Document Date	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the Publish From date is linked to the Document Date value from the source document. That date appears in the Publish From date field, which is read only and cannot be changed without selecting the Use option.	Option 1 of 2 in the Publish From set.	Yes, if Use Document Date is selected in Portal Settings – General – Documents – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Doc ument.PublishFrom. UseDocumentDate	
Publish From – Use	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish From field.	Option 2 of 2 in the Publish From set.	Yes, if Use Today's Date or Leave Blank is selected in Portal Settings – General – Documents – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Doc ument.PublishFrom. Use	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish From – Use (date)	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. This is the date from which the publication is available for subscribing.	Date	If Use Document Date is selected in Portal Settings – General – Documents – Publishing – From, pre-populate the field with the date from the profile of the published document.	Y	Y	Portal.PublicationPr operties.Profile.Doc ument.PublishFrom. Date	
			If Use Today's date is selected in Portal Settings – General – Documents – Publishing – From, pre-populate the field with today's date.				
			If Leave Blank is selected in Portal Settings – General – Documents – Publishing – From, do not pre-populate the field with a value.				
Publish To – Use	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish To field.	Option 3 of 3 in the Publish To set.	Yes, if Leave Blank is selected in Portal Settings – General – Documents – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Doc ument.PublishTo.Da te	
Publish To – Use ### days after the Publish From Date	When selected, the Publish To date is calculated by taking the Publish From date and adding the number of days entered in this field.	Option 2 of 3 in the Publish To set.	Yes, if Use ### days after the Publish From Date is selected in Portal Settings – General – Documents – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Doc ument.PublishTo.Nu mberofDays	
Publish To – Use ### days after the Publish From Date (number)	This is the number of days to add to the Publish From date in calculating the Publish To date.	Number	Use the value from the Use ### days after the Publish From Date number field in Portal Settings – General – Documents – Publishing – To.	N	N	Portal.PublicationPr operties.Profile.Doc ument.PublishTo.Nu mberofDays.Numbe r	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish To – Use (date)	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. This is the date through which the publication is available for subscribing.	Date	If Use ### days after the Publish From Date is selected, pre- populate the field with the results of adding the number entered to the Publish From date. If Use Today's date is selected in Portal Settings – General – Documents – Publishing – To, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Documents – Publishing – To, do not pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Doc ument.PublishTo.Da te	
Source Description	This is the document Description of the source document that is being published.	Read-only text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Doc ument.Source.Descr iption	
Summary – Include – Author	When checked, the document's Author code and full name is included in the summary. This field is only available for organization documents on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Documents tab.	N	N	Portal.PublicationPr operties.Profile.Doc ument.SummaryIncl ude.Author	
Summary – Include – Category	When checked, the document's Category description is included in the summary. This field is only available for individual documents on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Documents tab.l	N	N	Portal.PublicationPr operties.Profile.Doc ument.SummaryIncl ude.Category	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Include – Document Date	When checked, the document's Date is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Documents tab.	N	N	Portal.PublicationPr operties.Profile.Doc ument.SummaryIncl ude.DocumentDate	
Summary – Include – Type	When checked, the document's Type description is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Documents tab.	N	N	Portal.PublicationPr operties.Profile.Doc ument.SummaryIncl ude.Type	
Summary – Use	This is the only option available for document publications. There is no linking back to the published document record.	Option 1 of 1 in the Summary set.	Yes	N	N	Portal.PublicationPr operties.Profile.Doc ument.Summary.Us e	
Summary (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	Null	Y	Y	Portal.PublicationPr operties.Profile.Doc ument.Summary	
Title – Use	When this option is selected, the text in the Summary field will not be linked to the Document Descriptionof the published document.	Option 2 of 2 in the Title set.	No	N	N	Portal.PublicationPr operties.Profile.Doc ument.Title.Use	
Title – Use the Document Description	When this option is selected, the text in the Summary field will be linked to the Document Descriptionof the published document.	Option 1 of 2 in the Title set.	Yes	N	N	Portal.PublicationPr operties.Profile.Doc ument.Title.UseDoc umentName	

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Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Title (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the Document Description is selected, this field contains the full Document Description of the published document, but is read-only and cannot be edited. If Use the Document Description is not selected, this field is pre-populated with the full Document Description of the published document, but is not linked and can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Doc ument.Title	

Special Rules and Clarifications

- Both Available Portals and Assigned Portals listings should support multi-select, quick filtering, and drag'n'drop.
- Upon saving, check the Publish From and Publish To dates against today's date. If the item is not available for publishing because today's date does not fall with the from-to date range, display a message, giving the user the option of returning to the window and changing either date (Yes), or continuing to close the window with the dates as they are (No).
- If the item has already been published, publishing it again should bring up the existing publication record and assignments.

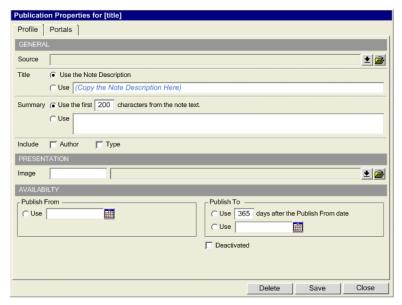
Rev No.	Rev Date	Rev By	Revision Description			
1.10	03/18/2002	TAF	Complete rework of mockups.			
			Final mockup for development review and coding.			

Last Updated: 07/15/2003

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7.6. Publication Properties – Profile – Note [Ph1]

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General	Description						
HelpID	Portal.PublicationProperties.Profile.Note						
Title	Publication Properties for [title]						
Usage	efines a "statement of publication" that includes default values for title, summary and image, as well as publish from d to availibility. This form is specifically for Note publications.						
Туре	Modal Multi-tab Window						
Open Focus	Source – Lookup						
Tab Order	 Source – Open Title – Use the Note Description Title – Use Title – Use (text) Summary – Use the first ### characters from the note text Summary – Use the first ### characters from the note text (number) Summary – Use Summary – Use (text) Summary – Include – Author Summary – Include – Type Image – Code Image – Lookup Image – Open Publish From – Use Publish From – Use (date) Publish From – Use (lookup) Publish To – Use ### days after the Publish From date (number) Publish To – Use Publish To – Use (date) Publish To – Use Publish To – Use (lookup) Publish To – Use (lookup) 						

General	Description
	 22. Deactivated 23. Delete 24. Save 25. Close 26. Source – Lookup
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Publication Properties window. If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.	Portal.PublicationProperties.Profile.Note.Close	
Delete	Deletes the publication records, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No). Any subscription based on the publication are also deleted.	Portal.PublicationProperties.Profile.Note.Close	
Image – Lookup	Displays the Select Image window.	Portal.PublicationProperties.Profile.Note.Image.Look up	
Image – Open	Displays the Image Properties DE form for the selected image.	Portal.PublicationProperties.Profile.Note.Image.Open	
Publish From – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Note.PublishFrom .Lookup	
Publish To – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Note.PublishTo.L ookup	
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Profile.Note.Save	
Source – Lookup	Displays the Select Source for Publication window, pre-filtered on notes.	Portal.PublicationProperties.Profile.Note.Source.Look up	
Source – Open	Displays the Note DE form for the source note.	Portal.PublicationProperties.Profile.Note.Source.Ope	

Last Updated: 07/15/2003

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Deactivated	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Note .Deactivated	
Image	This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Use the default image from Portal Settings – General Notes.	N	N	Portal.PublicationPr operties.Profile.Note .DefaultImage	
Publish From – Use	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish From field.	Option 1 of 1 in the Publish From set.	Yes, if Use Today's Date or Leave Blank is selected in Portal Settings – General – Notes – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Note .PublishFrom.Use	
Publish From – Use (date)	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. This is the date from which the publication is available for subscribing.	Date	If Use Today's date is selected in Portal Settings – General – Notes – Publishing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Notes – Publishing – From, do not pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Note .PublishFrom.Date	
Publish To – Use	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish To field.	Option 3 of 3 in the Publish To set.	Yes, if Leave Blank is selected in Portal Settings – General – Notes – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Note .PublishTo.Date	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish To – Use ### days after the Publish From Date	When selected, the Publish To date is calculated by taking the Publish From date and adding the number of days entered in this field.	Option 2 of 3 in the Publish To set.	Yes, if Use ### days after the Publish From Date is selected in Portal Settings – General – Notes – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Note .PublishTo.Numbero fDays	
Publish To – Use ### days after the Publish From Date (number)	This is the number of days to add to the Publish From date in calculating the Publish To date.	Number	Use the value from the Use ### days after the Publish From Date number field in Portal Settings – General – Notes – Publishing – To.	N	N	Portal.PublicationPr operties.Profile.Note .PublishTo.Numbero fDays.Number	
Publish To – Use (date)	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. This is the date through which the publication is available for subscribing.	Date	If Use ### days after the Publish From Date is selected, pre-populate the field with the results of adding the number entered to the Publish From date. If Use Today's date is selected in Portal Settings – General – Notes – Publishing – To, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Notes – Publishing – To, do not pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Note .PublishTo.Date	
Source Description	This is the note Description of the source note that is being published.	Read-only Text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Note .Source.Description	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Include – Author	When checked, the note's Author code and full name is included in the summary. This field is only available for organization notes on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Notes tab.	N	N	Portal.PublicationPr operties.Profile.Note .SummaryInclude.A uthor	
Summary – Include – Type	When checked, the note's Type description is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Notes tab.	N	N	Portal.PublicationPr operties.Profile.Note .SummaryInclude.T ype	
Summary – Use the first ### characters from the note text.	When this option is selected, the first ### characters from the note text will be used as the summary.	Option 1 of 2 in the Summary set.	Yes	N	N	Portal.PublicationPr operties.Profile.Note .Summary.UseFirst Characters	
Summary – Use the first ### characters from the note text (number).	This is the number of characters from the note text that will be used as the summary.	Number	This field is pre- populated with the default value from the Portal Settings – General – Notes tab.	N	N	Portal.PublicationPr operties.Profile.Note .Summary.UseFirst CharactersNumber	
Summary – Use	When this option is selected, the text in the Summary field will not be linked to the note text of the published note.	Option 2 of 2 in the Summary set.	No	N	N	Portal.PublicationPr operties.Profile.Note .Summary.Use	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the first ### characters from the note text is selected on this form, the field is pre- populated with those characters in read-only text that cannot be edited. If Use the first ### characters from the note text is not selected, then pre- populate this field with note text based on the selection in the Use the first ### characters from the note text on the Portal Settings – General – Notes tab, or null of no value is entered. This text can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Note .Summary	
Title – Use	When this option is selected, the text in the Summary field will not be linked to the Note Description of the published note.	Option 2 of 2 in the Title set.	No	N	N	Portal.PublicationPr operties.Profile.Note .Title.Use	
Title – Use the Note Description	When this option is selected, the text in the Summary field will be linked to the Note Description of the published note.	Option 1 of 2 in the Title set.	Yes	N	N	Portal.PublicationPr operties.Profile.Note .Title.UseNoteName	
Title (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the Note Description is selected, this field contains the full Note Description of the published note, but is read-only and cannot be edited. If Use the Note Description is not selected, this field is pre-populated with the full Note Description of the published note, but is not linked and can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Note .Title	

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Special Rules and Clarifications

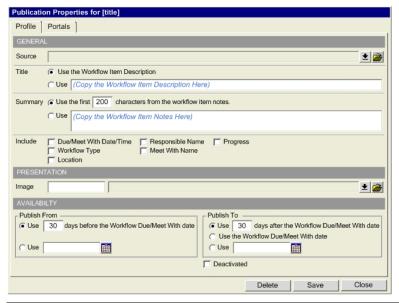
- 1. Both Available Portals and Assigned Portals listings should support multi-select, quick filtering, and drag'n'drop.
- 2. Upon saving, check the **Publish From** and **Publish To** dates against today's date. If the item is not available for publishing because today's date does not fall with the from-to date range, display a message, giving the user the option of returning to the window and changing either date (Yes), or continuing to close the window with the dates as they are (No).
- 3. If the item has already been published, publishing it again should bring up the existing publication record and assignments.

Rev No.	Rev Date	Rev By	Revision Description			
1.10	03/18/2002		Complete rework of mockups. Final mockup for development review and coding.			

Last Updated: 07/15/2003

7.7. Publication Properties – Profile – Workflow [Ph1]

Printed: 06/12/2018



General	Description						
HelpID	Portal.PublicationProperties.Profile.Workflow						
Title	Publication Properties for [title]						
Usage	efines a "statement of publication" that includes default values for title, summary and image, as well as publish from nd to availibility. This form is specifically for Workflow publications.						
Туре	Modal Multi-tab Window						
Open Focus	Source – Lookup						
Tab Order	 Source – Open Title – Use the Workflow Description Title – Use Title – Use (text) Summary – Use the first ### characters from the workflow item notes Summary – Use Summary – Use Summary – Use (text) Summary – Include – Due/Meet With Date/Time Summary – Include – Responsible Name Summary – Include – Progress Summary – Include – Workflow Type Summary – Include – Meet With Name Summary – Include – Location Image – Code Image – Code Image – Lookup Image – Open Publish From – Use ### days before the Workflow Due/Meet With date Publish From – Use ### days after the Workflow Due/Meet With date (number) Publish To – Use ### days after the Workflow Due/Meet With date Publish To – Use ### days after the Workflow Due/Meet With date (number) 						

General	Description
	22. Publish To – Use the Workflow Due/Meet With date
	23. Publish To – Use
	24. Publish To – Use (date)
	25. Publish To – Use (lookup)
	26. Deactivated
	27. Delete
	28. Save
	29. Close
	30. Source – Lookup
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Publication Properties window. If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.	Portal.PublicationProperties.Profile.Workflow.Close	
Delete	Deletes the publication records, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No). Any subscription based on the publication are also deleted.	Portal.PublicationProperties.Profile.Workflow.Close	
Image – Lookup	Displays the Select Image window.	Portal.PublicationProperties.Profile.Workflow.Image.Lookup	
Image – Open	Displays the Image Properties DE form for the selected image.	Portal.PublicationProperties.Profile.Workflow.Image. Open	
Publish To – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Workflow.Publish To.Lookup	
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Profile.Workflow.Save	
Source – Lookup	Displays the Select Source for Publication window, pre-filtered on workflow Items.	Portal.PublicationProperties.Profile.Workflow.Source. Lookup	
Source – Open	Displays the Workflow DE form for the source workflow item.	Portal.PublicationProperties.Profile.Workflow.Source. Open	

Last Updated: 07/15/2003

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Deactivated	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Wor kflow.Deactivated	
Image	This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Use the default image from Portal Settings – General Workflow.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.DefaultImage	
Publish From – Use ### days before the Due/Meet With Date	When selected, the Publish From date is calculated by taking the Due/Meet With date of the workflow item, and subtracting the number of days entered in this field.	Option 1 of 2 in the Publish From set.	Yes, if Use ### days before the Due/Meet With Date is selected in Portal Settings – General – Workflow – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.PublishFrom. Use	
Publish From – Use	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish From field.	Option 2 of 2 in the Publish From set.	Yes, if Use Today's Date is selected in Portal Settings – General – Workflow – Publishing – From. Otherwise, No.				

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish From – Use (date)	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. This is the date from which the publication is available for subscribing.	Date	If Use ### days before the Due/Meet With Date is selected in Portal Settings – General – Workflow – Publishing – From, the value in this field is the result of taking the Due/Meet With date of the workflow item, and subtracting the number of days entered. If Use Today's date is selected in Portal Settings – General – Workflow –	Y	Υ	Portal.PublicationPr operties.Profile.Wor kflow.PublishFrom. Date	
			Publishing – From, pre-populate the field with today's date.				
Publish To – Use	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific	Option 3 of 3 in the Publish To set.	Yes, if Leave Blank is selected in Portal Settings – General – Workflow – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.PublishTo.Dat e	
	date in the Publish To field.						
Publish To – Use ### days after the Workflow Due/Meet With Date	When selected, the Publish To date is calculated by taking the Due/Meet With date and adding the number of days entered in this field.	Option 1 of 3 in the Publish To set.	Yes, if Use ### days after the Due/Meet With Date is selected in Portal Settings – General – Workflow – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.PublishTo.Nu mberofDays	
Publish To – Use ### days after the Workflow Due/Meet With Date (number)	This is the number of days to add to the Due/Meet With date in calculating the Publish To date.	Number	Use the value from the Use ### days after the Due/Meet With Date number field in Portal Settings – General – Workflow – Publishing – To.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.PublishTo.Nu mberofDays.Numbe r	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish To – Use the Workflow Due/Meet With Date	When selected, the Publish To date is the same as the Due/Meet With date of the workflow items.	Option 2 of 3 in the Publish To set.	Yes, if Use the Due/Meet With Date is selected in Portal Settings – General – Workflow – Publishing – To. Otherwise, No.				
Publish To – Use (date)	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. This is the date through which the publication is available for subscribing.	Date	If Use ### days after the Due/Meet With Date is selected, pre- populate the field with the results of adding the number entered to the Due/Meet With date. If Use the Due/Meet With Date is selected in Portal Settings – General – Workflow – Publishing – To, pre-populate the field with that date. If Leave Blank is selected in Portal Settings – General – Workflow – Publishing – To, do not pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Wor kflow.PublishTo.Dat e	
Source Description	This is the workflow item Description of the source workflow item that is being published.	Read-only Text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Wor kflow.Source.Descri ption	
Summary – Include – Due/Meet With Date	When checked, the Due/Meet With date/time from the workflow item is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Workflow tab.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.SummaryInclu de.Due/MeetWithDa te	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Include – Location	When checked, the Location from the workflow item is included in the summary. This field is only available for appointment, court event, or critical date workflow items on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Workflow tab.	N	N	PoPortal.Publication Properties.Profile.W orkflow.SummaryInc lude.Location	
Summary – Include – Meet With Name	When checked, the Meet With name from the workflow item is included in the summary. This field is only available for appointment or critical date workflow items on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Workflow tab.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.SummaryInclu de.MeetWithName	
Summary – Include – Progress	When checked, the Progress text from the workflow item is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Workflow tab.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.SummaryInclu de.Progress	
Summary – Include – Responsible Name	When checked, the Responsible name from the workflow item is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Workflow tab.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.SummaryInclu de.ResponsibleNam e	
Summary – Include – Workflow Type	When checked, the Type description from the workflow item is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Workflow tab.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.SummaryInclu de.WorkflowType	
Summary – Use the first ### characters from the workflow item note.	When this option is selected, the first ### characters from the workflow item note will be used as the summary.	Option 1 of 2 in the Summary set.	Yes	N	N	Portal.PublicationPr operties.Profile.Wor kflow.Summary.Use FirstCharacters	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Use the first ### characters from the workflow item note (number).	This is the number of characters from the workflow item note that will be used as the summary.	Number	This field is pre- populated with the default value from the Portal Settings – General – Workflow tab.	N	N	Portal.PublicationPr operties.Profile.Wor kflow.Summary.Use FirstCharactersNum ber	
Summary – Use	When this option is selected, the text in the Summary field will not be linked to the workflow item note of the published workflow item.	Option 2 of 2 in the Summary set.	No	N	N	Portal.PublicationPr operties.Profile.Wor kflow.Summary.Use	
Summary (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the first ### characters from the workflow item note is selected on this form, the field is pre-populated with those characters in read-only text that cannot be edited. If Use the first ### characters from the workflow item note is not selected, then pre-populate this field with note text based on the selection in the Use the first ### characters from the workflow item note on the Portal Settings – General – Workflow tab, or null of no value is entered. This text can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Wor kflow.Summary	
Title – Use	When this option is selected, the text in the Summary field will not be linked to the Workflow Description of the published workflow item.	Option 2 of 2 in the Title set.	No	N	N	Portal.PublicationPr operties.Profile.Wor kflow.Title.Use	
Title – Use the Workflow Description	When this option is selected, the text in the Summary field will be linked to the Workflow Description of the published workflow item.	Option 1 of 2 in the Title set.	Yes	N	N	Portal.PublicationPr operties.Profile.Wor kflow.Title.UseWorkf lowName	

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Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Title (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the Workflow Description is selected, this field contains the full Workflow Description of the published workflow item, but is read- only and cannot be edited. If Use the Workflow Description is not selected, this field is pre-populated with the full Workflow Description of the published workflow item, but is not linked and can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Wor kflow.Title	

Special Rules and Clarifications

- 1. Both Available Portals and Assigned Portals listings should support multi-select, quick filtering, and drag'n'drop.
- 2. Upon saving, check the **Publish From** and **Publish To** dates against today's date. If the item is not available for publishing because today's date does not fall with the from-to date range, display a message, giving the user the option of returning to the window and changing either date (Yes), or continuing to close the window with the dates as they are (No).
- 3. If the item has already been published, publishing it again should bring up the existing publication record and assignments.

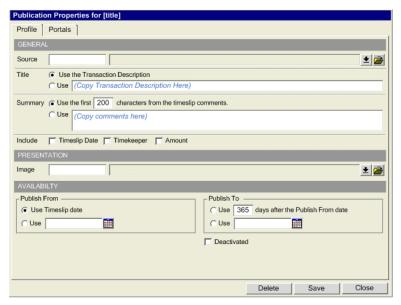
Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Complete rework of mockups.
			Final mockup for development review and coding.

Last Updated: 07/15/2003

Last Updated: 07/15/2003

7.8. Publication Properties – Profile – Timeslip [Ph1]

Printed: 06/12/2018



General	Description						
HelpID	Portal.PublicationProperties.Profile.Timeslip						
Title	Publication Properties for [title]						
Usage	efines a "statement of publication" that includes default values for title, summary and image, as well as publish from add to availibility. This form is specifically for Timeslip publications.						
Туре	Modal Multi-tab Window						
Open Focus	Source Code						
Tab Order	 Source – Lookup Source – Open Title – Use the Transaction Description Title – Use (text) Summary – Use the first ### characters from the timeslip comments Summary – Use the first ### characters from the timeslip comments (number) Summary – Use Summary – Use (text) Summary – Include – Timeslip Date Summary – Include – Timekeeper Summary – Include – Amount Image – Code Image – Lookup Image – Open Publish From – Use Timeslip Date Publish From – Use (date) Publish From – Use (lookup) Publish From – Use ### days after the Publish From date Publish To – Use ### days after the Publish From date (number) 						

General	Description
	 22. Publish To – Use 23. Publish To – Use (date) 24. Publish To – Use (lookup) 25. Deactivated 26. Delete 27. Save 28. Close 29. Source – Code
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Publication Properties window. If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.	Portal.PublicationProperties.Profile.Timeslip.Close	
Delete	Deletes the publication records, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No). Any subscription based on the publication are also deleted.	Portal.PublicationProperties.Profile.Timeslip.Close	
Image – Lookup	Displays the Select Image window.	Portal.PublicationProperties.Profile.Timeslip.Image.Lookup	
Image – Open	Displays the Image Properties DE form for the selected image.	Portal.PublicationProperties.Profile.Timeslip.Image.O pen	
Publish From – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Timeslip.PublishFrom.Lookup	
Publish To – Use – Lookup	Displays a calendar from which the user can select a date.	Portal.PublicationProperties.Profile.Timeslip.PublishT o.Lookup	
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Profile.Timeslip.Save	
Source – Lookup	Displays the Select Source for Publication window, pre-filtered on timeslips.	Portal.PublicationProperties.Profile.Timeslip.Source.Lookup	

Buttons	Function / Action	HelpID	Hot Key
Source – Open	Displays the Timeslip DE form for the source timeslip.	Portal.PublicationProperties.Profile.Timeslip.Source. Open	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Deactivated	When checked, the item is deactived and cannot be subscribed to. Existing subscriptions, however, are not removed, but the item will not appear on the portal as the item is deactivated.	Checkbox	Null	N	N	Portal.PublicationPr operties.Profile.Tim eslip.Deactivated	
Image	This is the image to use for the item. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different images.	Code – Searches for images by code. Description – Read- only text description of the selected image.	Use the default image from Portal Settings – General Timeslips.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.DefaultImage	
Publish From – Use Timeslip Date	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the Publish From date is linked to the Timeslip Date value from the source timeslip. That date appears in the Publish From date field, which is read only and cannot be changed without selecting the Use option.	Option 1 of 2 in the Publish From set.	Yes, if Use Timeslip Date is selected in Portal Settings – General – Timeslips – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.PublishFrom.U seTimeslipDate	
Publish From – Use	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish From field.	Option 1 of 2 in the Publish From set.	Yes, if Use Today's Date or Leave Blank is selected in Portal Settings – General – Timeslips – Publishing – From. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.PublishFrom.U se	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish From – Use (date)	The Publish From date is the first date on which the item can be subscribed to and presented on a portal. This is the date from which the publication is available for subscribing.	Date	If Use Timeslip Date is selected in Portal Settings – General – Timeslips – Publishing – From, pre-populate the field with the date of the published timeslip. If Use Today's date is selected in Portal Settings – General – Timeslips – Publishing – From, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Timeslips – Publishing – From, do not pre-populate the field with a	Y	Υ	Portal.PublicationPr operties.Profile.Tim eslip.PublishFrom.D ate	
Publish To – Use	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. When selected, the use enters a specific date in the Publish To field.	Option 3 of 3 in the Publish To set.	value. Yes, if Leave Blank is selected in Portal Settings – General – Timeslips – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.PublishTo.Dat e	
Publish To – Use ### days after the Publish From Date	When selected, the Publish To date is calculated by taking the Publish From date and adding the number of days entered in this field.	Option 2 of 3 in the Publish To set.	Yes, if Use ### days after the Publish From Date is selected in Portal Settings – General – Timeslips – Publishing – To. Otherwise, No.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.PublishTo.Nu mberofDays	
Publish To – Use ### days after the Publish From Date (number)	This is the number of days to add to the Publish From date in calculating the Publish To date.	Number	Use the value from the Use ### days after the Publish From Date number field in Portal Settings – General – Timeslips – Publishing – To.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.PublishTo.Nu mberofDays.Numbe r	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Publish To – Use (date)	The Publish To date is the last date on which the item can be subscribed to and presented on a portal. This is the date through which the publication is available for subscribing.	Date	If Use ### days after the Publish From Date is selected, pre- populate the field with the results of adding the number entered to the Publish From date. If Use Today's date is selected in Portal Settings – General – Timeslips – Publishing – To, pre-populate the field with today's date. If Leave Blank is selected in Portal Settings – General – Timeslips – Publishing – To, do not pre-populate the field with a value.	Y	Y	Portal.PublicationPr operties.Profile.Tim eslip.PublishTo.Dat e	
Source Code	This is the Transaction Code of the source timeslip that is being published.	Code	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Tim eslip.Source.Code	
Source Description	This is the Transaction Description of the source timeslip that is being published.	Read-only Text	Null	Υ	Υ	Portal.PublicationPr operties.Profile.Tim eslip.Source.Descri ption	
Summary – Include – Timekeeper	When checked, the timeslip's Timekeeper code and full name is included in the summary. This field is only available for organization timeslips on the Publication Properties DE form.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Timeslips tab.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.SummaryInclu de.Timekeeper	
Summary – Include – Timeslip Date	When checked, the timeslip's Date is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Timeslips tab.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.SummaryInclu de.Date	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Summary – Include – Amount	When checked, the timeslip's Amount is included in the summary.	Checkbox	This field is pre- populated with the corresponding selection from the Portal Settings – General – Timeslips tab.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.SummaryInclu de.Amount	
Summary – Use the first ### characters from the timeslip comments.	When this option is selected, the first ### characters from the timeslip comments will be used as the summary.	Option 1 of 2 in the Summary set.	Yes	N	N	Portal.PublicationPr operties.Profile.Tim eslip.Summary.Use FirstCharacters	
Summary – Use the first ### characters from the timeslip comments (number).	This is the number of characters from the timeslip comments that will be used as the summary.	Number	This field is pre- populated with the default value from the Portal Settings – General – Timeslips tab.	N	N	Portal.PublicationPr operties.Profile.Tim eslip.Summary.Use FirstCharactersNum ber	
Summary – Use	When this option is selected, the text in the Summary field will not be linked to the timeslip commentsof the published timeslip.	Option 2 of 2 in the Summary set.	No	N	N	Portal.PublicationPr operties.Profile.Tim eslip.Summary.Use	
Summary (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the first ### characters from the timeslip comments is selected on this form, the field is prepopulated with those characters in read-only text that cannot be edited. If Use the first ### characters from the timeslip comments is not selected, then prepopulate this field with note text based on the selection in the Use the first ### characters from the timeslip comments on the Portal Settings – General – Timeslips tab, or null of no value is entered. This text can be edited.	Y	Y	Portal.PublicationPr operties.Profile.Tim eslip.Summary	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Title – Use	When this option is selected, the text in the Summary field will not be linked to the Transaction Description of the published timeslip.	Option 2 of 2 in the Title set.	No	N	N	Portal.PublicationPr operties.Profile.Tim eslip.Title.Use	
Title – Use the Transaction Description	When this option is selected, the text in the Summary field will be linked to the Transaction Description of the published timeslip.	Option 1 of 2 in the Title set.	Yes	N	N	Portal.PublicationPr operties.Profile.Tim eslip.Title.UseTimes lipName	
Title (text)	This is the summary for the publication. It is used on the Subscribe DE form as the default when it is first opened. The publication and subscription can have different summaries.	Text	If Use the Transaction Description is selected, this field contains the full Transaction Description of the published timeslip, but is read-only and cannot be edited.	Υ	Υ	Portal.PublicationPr operties.Profile.Tim eslip.Title	
			If Use the Transaction Description is not selected, this field is pre-populated with the full Transaction Description of the published timeslip, but is not linked and can be edited.				

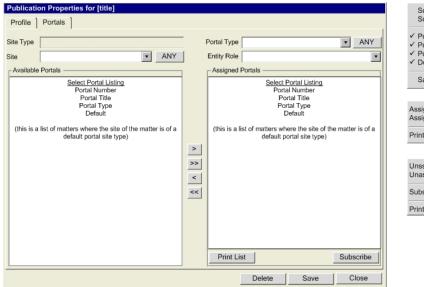
Special Rules and Clarifications

- 1. Both Available Portals and Assigned Portals listings should support multi-select, quick filtering, and drag'n'drop.
- 2. Upon saving, check the **Publish From** and **Publish To** dates against today's date. If the item is not available for publishing because today's date does not fall with the from-to date range, display a message, giving the user the option of returning to the window and changing either date (Yes), or continuing to close the window with the dates as they are (No).
- 3. If the item has already been published, publishing it again should bring up the existing publication record and assignments.

	Rev No.	Rev Date	Rev By	Revision Description
1.10		03/18/2002		Complete rework of mockups. Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

7.9. Publication Properties – Portals [Ph1]





General	Description
HelpID	Portal.PublicationProperties.Portals
Title	Publication Properties
Usage	Allows the user to publish an item from within Practice Manager to a portal.
Туре	Modal modified 2-panel assignment window.
Open Focus	Site
Tab Order	 Site – Any Portal Type Portal Type – Any Entity Role (if entity) Available Portals Assign (>) Assign All (>>) Unassign (<) Unassign All (<<) Print List Subscribe Delete Save Close Site

General	Description
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 12.1.5 Select Portal Image 12.1.11 Select Publication Source
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Assigns the selected Available Portals to the publication item.	Portal.PublicationProperties.Portals.Assign	
Assign All (>>)	Assigns all Available Portals to the selected publication item.	Portal.PublicationProperties.Portals.AssignAll	
Close	Closes the Publication Properties window. If unsaved changes exist in the publication information, display a dialog box advising the user that changes exist, and give them the option of saving the changes (Yes), discarding the changes (No), or returning to the Publication Properties form in the state in which it was left when Close was selected.	Portal.PublicationProperties.Portals.Profile.Close	
Delete	Deletes the publication records, but first displays a dialog box, allowing the user to continue deleting the records (Yes), or keeping the record (No).	Portal.PublicationProperties.Portals.Profile.Close	
Print List	Displays a listing of exisiting assignments.	Portal.PublicationProperties.Portals.Listing	
Save	If the user changes the Publish From, Publish To or Deactivated fields, the save button is enabled. This saves the new publication information.	Portal.PublicationProperties.Portals.Profile.Save	
Sites – ANY	Does not filter the Available Portals and Assigned Portals listings by a specific site.	Portal.PublicationProperties.Portals.SitesAny	
Subscribe	Displays the Subscription Properties dialog box for the selected Portal.	Portal.PublicationProperties.Portals.Subscribe	
Portal Types – ANY	Does not filter the Available Portals and Assigned Portals listings by a specific portal type.	Portal.PublicationProperties.Portals.PortalTypeAny	
Unassign (<)	Removes the selected Assigned Portals from the image groups.	Portal.PublicationProperties.Portals.Unassign	
Unassign All (<<)	Removes all Assigned Portals from the image groups.	Portal.PublicationProperties.Portals.UnassignAll	

Printed: 06/12/2018

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Assigned Portals	These are the portals to which the Item to Publish is assigned. In order for a portal to appear in the Assigned Portals list, it must have been assigned through the Publication Properties DE form so that it has a publication record.	Assignment panel listing		n/a	n/a	Portal.PublicationPr operties.Portals.Assi gnedPortals	
Available Portals	These are the portals to which the Item to Publish is not assigned.	Assignment panel listing		n/a	n/a	Portal.PublicationPr operties.Portals.Ava ilablePortals	
Entity Role	If the item is an entity, the Role field appears, displaying a list of all entity roles. The user must select a role to use for publishing the entity (assigning) to the portal. In future releases, when Practice Manager Administration is site-specific, these roles would be specific and appropriate for portals.	Drop-down List	First role on list.	γ*	γ*	Portal.PublicationPr operties.Portals.Rol e	
Portal Type	This is the portal type to filter the Assigned Portals and Available Portals listings by. This field is inactive if Portal Type – ANY is selected.	Drop-down List: Same as law types.	ANY	Y – If Option 2 of 2 is active	na.	Portal.PublicationPr operties.Portals.Port alType	
Site	This is the site on which to filter the Available Portals and Assigned Portals listings. The list defaults to those of the portal site type.	Drop-down List	ALL	n/a	n/a	Portal.PublicationPr operties.Portals.Site	
Site Type	This is the site type for portals.	Read-only description of the site type for portals.	Default site type for portals.	n/a	n/a	Portal.PublicationPr operties.Portals.Site Type	

Last Updated: 07/15/2003

Column Heading	Definition	Help ID	Hot Key
Default	Indicates the portal is the default portal for the organization.	Portal.PublicationPr operties.Portals.Def ault	
Portal Number	This is the number of the portal (same as Matter Number).	Portal.PublicationPr operties.Portals.Port alNumber	
Portal Title	This is the title of the portal (same as the Matter Search Name).	Portal.PublicationPr operties.Portals.Port alTitle	
Portal Type	This is the type of portal (same as Law Type).	Portal.PublicationPr operties.Portals.Law Type	

Special Rules and Clarifications

- 1. Both Available Portals and Assigned Portals listings should multi-select, quick filtering, and drag'n'drop.
- If the item is an entity, display the Entity Role field. There is no filtering on the Entity Role field. It displays all entity roles in the system. If the selected Entity Role is not assigned to the Portal (Law) Type of one or more of the Assigned Portals, go ahead and make the assignment, and then assign the entity to those portals using that newly assigned roles. In the future, this will be sitespecific and less of an issue.
- 3. If New publications are automatically assigned to all active portals is selected on the Portal Settings General page, all portals are automatically assigned to the new publication, and appear by default on the Assigned Portals listing.

If New publications are automatically assigned to all active portals is not selected on the Portal Settings – General page, only existing assignments made through other Practice Manager assignment mechanisms appear by default on the Assigned Portals listing.

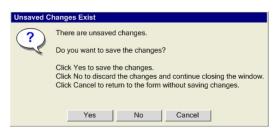
In either instance, the user can then manipulate the **Assigned Portals** listing as needed.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.01	03/05/2002		Completely reworked the mockup. Added Role lookup for entity assignment to portal matters.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

7.10. Publication Properties – Unsaved Changes Exist [Ph1]

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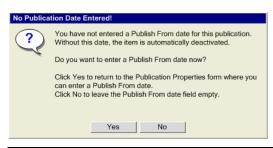
General	Description
HelpID	Portal.PublicationProperties.Portals.UnsavedChanges
Title	Unsaved Changes Exist
Usage	This dialog box appears after the user attempts to close the Publication Properties window, and unsaved changes exist. The user has the option to save the changes (Yes), discard the changes (No), or return to the Publication Properties window in the state it was in when closing was carried out without saving the changes.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Cancel 3. Yes
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Publication Properties window without saving or discarding the changes.	Portal.PublicationProperties.UnsavedChanges.Cance	
No	Continues closing the Publication Properties window, and discards any changes that have been made to the Publication Properties since the last time the settings were saved.	Portal.PublicationProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Publication Properties window.	Portal.PublicationProperties.UnsavedChanges.Yes	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/05/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

7.11. Publication Properties – **No** Publication Date Entered [Ph1]



Printed: 06/12/2018

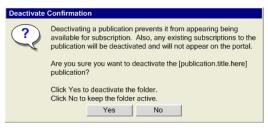
General	Description
HelpID	Portal.PublicationProperties.NoActivationDate
Title	No Activation Date Entered
Usage	Alerts the user that they have not entered an Active From date on the Publication Properties – Profile . Without this date, the publication is deactivated.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Yes
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing

Buttons	Function / Action	HelpID	Hot Key
No	Continues saving the Publication Properties window.	Portal.PublicationProperties.NoActivationDate.No	
Yes	Returns the user to the Publication Properties window without saving the record.	Portal.PublicationProperties.NoActivationDate.Yes	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

7.12. Publication Properties – Deactivate Confirmation [Ph1]



General	Description
HelpID	Portal.PublicationProperties.DeactivateConfirmation
Title	Deactivate Confirmation
Usage	Allows the user to either continue deactiving an active publiaction (Yes), or terminate deactiving the folder (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Buttons	Function / Action	HelpID	
No	Terminates deactiving the folder. If the dialog box was displayed as a result of saving the Publication Properties window with Deactivated field checked, the user is returned to the Publication Properties window. If the dialog box was displayed as a result of responding Yes to Unsaved Changes from a Publication Properties window where Deactivated was selected, the user is returned to the Publication Properties window and the record is not saved. If the dialog box was displayed as a result of the user deactivating the folder directly from the Publications Listing, the Publications Listing appears.	Portal.PublicationProperties.DeactivateConfirmation.	
Yes	Continues deactiving the folder. The Publications Listing appears.	Portal.PublicationProperties.DeactivateConfirmation. Yes	

	Special Rules and Clarifications
1.	None.

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Rev No.	Rev Date	Rev By	Revision Description
1.00	03/01/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

7.13. Publication Properties – Delete Confirmation [Ph1]



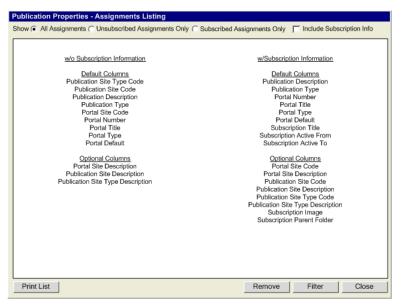
General	Description	
HelpID	Portal.PublicationProperties.DeleteConfirmation	
Title	Delete Confirmation	
Usage	This dialog box appears after the user choose to delete the Publication Properties , either from a listing or the Publication Properties window. The user has the option of either continuing deleting the publication (Yes), or terminating the delete process (No).	
Туре	Modal Dialog	
Open Focus	No	
Tab Order	1. Yes 2. No	
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.5 Publishing Items – Delete Existing Publication 10.8.1 Manage Publications – List Publications	
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – Add Portal Assignment Printing	

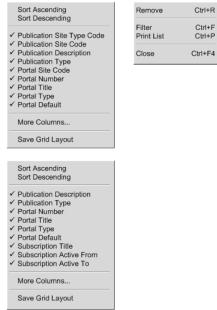
Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the publication, and returns the user to the window from which the dialog box was opened.	Portal.PublicationProperties.DeleteConfirmation.No	
Yes	Continues deleting the publication, and closes the Publication Properties window.	Portal.PublicationProperties.DeleteConfirmation.Yes.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/05/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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7.14. Publication Properties – Listing [Ph3]





General	Description
HelpID	Portal.PublicationProperties.Listing
Title	Publication Properties → Listing
Usage	Displays a list of portals the selected item has been published to.
Туре	Listing Window
Open Focus	Show – All Publications
Tab Order	 Show – Subscribed Publications Only Show – Unsubscribed Publications Only Include Subscription Information Grid Print List Remove Filter Close Show – All Publications
Related Use Cases	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 12.1.11 Select Publication Source 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.2 Publishing Items – Modify Existing Publication 8.1.5 Publishing Items – Delete Existing Publication 10.8.1 Manage Publications – List Publications 12.1.5 Select Portal Image
Phasing Considerations	Phase 1 – Not Required Phase 2 – Not Required Phase 3 – Required

General	Description
Related Mockups	9.129 Portal Settings – Publications Listing – Filter 9.131 Portal Settings – Publications Listing – Filter – Select Portals 9.130 Portal Settings – Publications Listing – Filter – Select Portal Sites 9.132 Portal Settings – Publications Listing – Filter – Select Portal Types 9.133 Portal Settings – Publications Listing – Filter – Select Publications 9.123 Portal Settings – Publications Listing – Grid Layout Properties 9.134 Portal Settings – Publications Listing – Remove Confirmation – Publication 9.135 Portal Settings – Publications Listing – Remove Confirmation – Subscription 9.125 Portal Settings – Publications Listing – Report Settings – Custom 9.127 Portal Settings – Publications Listing – Report Settings – General – Save Report (exists) 9.124 Portal Settings – Publications Listing – Report Settings – General 9.126 Portal Settings – Publications Listing – Report Settings – General – Save Report (save) 9.128 Portal Settings – Publications Listing – Report Settings – General – Save Report Success

Buttons	Function / Action	HelpID	Hot Key
Clear Filter	Clears any previously applied filter criteria, and returns the list to All Publications, with Include Subscription Information not selected.	Portal.PublicationProperties.Listing.ClearFilter	
Close	Closes the Publication Properties – Listing window.	Portal.PublicationProperties.Listing.Close	
Filter	Displays the Publications Assignment Listing Filter window.	Portal.PublicationProperties.Listing.Filter	
Print List	Prints the list of publication assignments to a file or printer.	Portal.PublicationProperties.Listing.PrintList	
Remove	Removes the selected portal or subscription, but first displays a dialog box which gives the user the option of proceeding with removing the portal/subscription (Yes) or keeping it (No).	Portal.PublicationProperties.Listing.Remove	

Column Headings with Include Subscription Information NOT Selected	Definition	HelpID	Hot Key
Portal Default	This indicates if the portal is the default portal.	Portal.PublicationPr operties.Listing.Port alDefault	
Portal Number	This is the portal number.	Portal.PublicationPr operties.Listing.Port alNumber	
Portal Site Code	This is the code of the site for the portal.	Portal.PublicationPr operties.Listing.Port alSiteCode	
Portal Site Description	This is the description of the portal site.	Portal.PublicationPr operties.Listing.Port alSiteDescription	
Portal Title	This is the portal title.	Portal.PublicationPr operties.Listing.Port alTitle	

Column Headings with Include Subscription Information	Definition	HelpID	Hot Key
NOT Selected			
Portal Type	This is the portal type.	Portal.PublicationPr operties.Listing.Port alType	
Publication Description	This is the description of the publication.	Portal.PublicationPr operties.Listing.Publ icationDescription	
Publication Site Code	This is the code of the publication site.	Portal.PublicationPr operties.Listing.Publ icationSiteCode	
Publication Site Description	This is the description of the publication site.	Portal.PublicationPr operties.Listing.Publ icationSiteDescriptio n	
Publication Site Type Code	This is the code of the site type for the publication site.	Portal.PublicationPr operties.Listing.Publ icationSiteTypeCod e	
Publication Site Type Description	This is the description of the publication site type.	Portal.PublicationPr operties.Listing.Publ icationSiteTypeDesc ription	
Publication Type	This is the type of publication (matter, entity, document, note, workflow, timeslip, etc.)	Portal.PublicationPr operties.Listing.Publ icationType	
Additional Column Headings with "Include Subscription Information" Selected	Definition	HelpID	Hot Key
Subscription Title	This is the title as it appears in the subscription definition for the publication on the selected portal.	Portal.PublicationPr operties.Listing.Sub scriptionTitle	
Subscription Active From	This is the date from which the subscription for the publication on the selected portal is active.	Portal.PublicationPr operties.Listing.Sub scriptionActiveFrom	
Subscription Active To	This is the date through which the subscription for the publication on the selected portal is active.	Portal.PublicationPr operties.Listing.Sub scriptionActiveTo	
Subscription Image	This is the image as it appears in the subscription definition for the publication on the selected portal.	Portal.PublicationPr operties.Listing.Sub scriptionImage	

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Additional Column Headings with "Include Subscription Information" Selected	Definition	HelpID	Hot Key
Subscription Parent Folder	This is the parent folder in which the subscription appears for the publication on the selected portal.	Portal.PublicationPr operties.Listing.Sub scriptionParentFold er	

Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- 2. The grid includes a shortcut menu for the records listing, allowing the user to create a new portal application, open, copy, set as default or delete an existing portal application that has been selected; print the list of portal applications, or close the window.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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8. Publications – Use Cases

The following use cases described the processes for publishing items to portals so that they may be included in the portal's Web presentation.

There are two steps to publishing an item:

- 8. Defining publication properties, such as **Default Title**, **Default Summary** and **Image**.
- 9. Assigning the publication to portals so that users can then select to subscribe to the items.

The second step, assigning an item to a portal, can be carried out through any of Practice Manager's assignment functions, such as **Related Matters** on the **Document** and **Note** DE forms; however, in order for an item to actually be subscribed to on a portal, it must first have a **Publication Profile** created.

To simplify assigning items to portals and entering the publication information, the **Publication Properties** DE form has been created. It includes the additional publication information, as well as a pre-filtered list of available portal matters from which to choose for assignment.

In addition to publising items, the **Publication Properties** DE form allows the user to access the Subscription DE form from the assignment window, thereby allowing them to publish and subscribe in the same basic action, without needing to open the portal itself.

Any item in Practice Manager that supports the "Related Matters" functionality can be published to more than one portal.

Each published item has only one **Publication Profile**, even though it may be assigned to many portals.

The process of making an item specific for a portal is referred to as "subscribing." When a user subscribes to a publication for a portal, they can accept or modify the **Default Title**, **Default Summary** and **Image**, on the **Subscription** DE form.

The use cases contained herein for **Publishing Items** only describe the processes for using the **Publication Properties** DE form. The use cases for using other matter-relating mechanisms in Practice Manager are beyond the scope of this specification.

8.1. Publishing Items

8.1.1. Publishing Items – Publish Item [Ph1]

Goal in Context	Create or update the publication record.
Scope & Level	The scope of this use case carries out the Goal in Context in full using the Publication Properties DE form.
Preconditions	The item being published is existing. The user is the creator or last revisor of the item being published.
Success End Condition	The publication record is created and/or updated.
Failed End Condition	The publication record was not created and/or updated.
Primary Actors	Intermediate to advanced users responsible for publishing items that can be made available for subscription on portals.
Secondary Actors	None.
Trigger	The user wants to publish an existing item so that it can be used on a portal.

STEPS - METHOD 1 (FROM AN ITEM LISTING)

- 1. Highlight the item to be published.
- 2. Choose Publish:
 - a. Click on the **Publish** icon on the Practice Manager toolbar.
 - **b.** Choose **Publish** from the Practice Manager **Tools** menu.
 - c. Right click on the item and choose Publish from the pop-menu.
- 3. The Publication Properties DE form appears in the following state:
 - **a.** The data fields are appropriate for the selected item item.
 - **b.** If the record has not been previously published...
 - i. The Source and Title fields are populated with data from the selected item for publication:
 - (1) For matters, this is Matter Number and Matter Search Name.
 - (2) For entities, this is the Entity Code and Full Entity Name.
 - (3) For documents, notes, and workflow items, this is the **Description**.
 - (4) For timeslips, this is the Transaction Code and Description.
 - ii. The Summary Include options are populated in accordance with the default selections on the Portal Settings – General page for the selected item type
 - iii. The Publish From and Publish To date fields are based on the selection on the Portal Settings General page for the selected item type.
 - **c.** If the record has been previously published, the fields are populated with the values last saved.
- **4.** Complete/modify the fields on the form as needed.
- 5. Click Save or switch to the Portals tabs, the record is saved/updated.
- 6. Assign the publication to Portals, as needed.
- 7. Close when finished.

STEPS - METHOD 2 (FROM A PUBLICATION LISTING)

- 1. Choose New.
- **2.** The New Publication dialog box appears in the following state:
 - a. A Practice Manager Record is selected.
 - b. The OK and Cancel buttons are enabled.
- 3. Choose the source type, and click OK.
 - a. If A Practice Manager Record is selected, the Select Source for Publication window appears.

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- **b.** Locate and choose a source from Practice Manager, and click **Select**.
- 4. The Publication Properties DE form appears in the following state:
 - a. The data fields are appropriate for the selected item.
 - **b.** If the record has not been previously published...
 - i. The Source and Title fields are populated with data from the selected item for publication:
 - (1) For matters, this is Matter Number and Matter Search Name.
 - (2) For entities, this is the Entity Code and Full Entity Name.
 - **(3)** For documents, notes, and workflow items, this is the **Description**.
 - (4) For timeslips, this is the **Transaction Code** and **Description**.
 - ii. The Summary Include options are populated in accordance with the default selections on the Portal Settings General page for the selected item type.
 - iii. The Image option is populated in accordance with the default selection on the Portal Settings General page for the selected item type.
 - The Publish From and Publish To date fields are based on the selection on the Portal Settings – General page for the selected item type.
 - C. If the record has been previously published, the fields are populated with the values last saved.
 - **d.** If the publication is a Weblink, populate the Source field with the URL of the Web page or application for the publication.
 - e. Save is disabled.
 - f. Delete and Close are enabled.
- **5.** Enter/modify the **Title** for the publication.
 - a. For matters, entites, documents, notes, workflow items and timeslips, the Title can be linked to the record Description/Name.
 - **b.** For Weblinks, the field must be populated manually.
 - c. Save is enabled.
- **6.** Enter/modify a **Summary** for the publication.
 - For matters, notes, workflow items and timeslips, the Title can be linked to the record Description/Name.
 - **b.** For Weblinks, entities, and documents, the field must be populated manually.
- 7. Modify the **Summary Include** options, as needed.
- **8.** Modify the selected **Image**, as needed.
- **9.** Modify the **Publish From** and **Publish To**, as needed.
- **10.** As needed, deactivate or activate the publication.
- 11. Click **Save**, or switch to the Portals tab. The publication record is saved/updated.

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- a. Save is disabled.
- b. Delete and Close are enabled.
- **12.** Assign the publication to **Portals**, as needed.
- 13. When finished, click Close.

EXTENSION - SELECT DATA RECORD

If the user chooses a data record type - Matter, Entity, Document, Note, Timeslip or Workflow, Use the following procedure to populate the **Source** field.

- 1. Click the lookup button immediately to the right of the Source field. The Practice Manager Select window corresponding to the selected data type appears.
- 2. Locate the record you want to publish, and click **Select**.
 - **a.** If the record has not been published, the remaining fields are null.
 - **b.** If the record is already published, the fields are populated with the data from the last time the publication was saved.

EXTENSION - SELECT DEFAULT IMAGE

To select a **Default Image**, carry out one of the following:

- **1.** Enter the code of the image, and press **Tab**.
 - a. If the image is found, the code field is populated with the image code and description field is populated with the image description.
 - b. If the image is not found, the words Record Not Found appear in the image code field.
- Click on the look-up button immediately to the right of the description field. The Select Image window appears. Choose an image, and click Select. The code field is populated with the image code and description field is populated with the image decription.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Publication Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- 3. The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - NO PUBLICATION DATE ENTERED

Upon saving the publication, if no **Published From** date has been entered, a dialog box appears.

- 1. Clicking Yes returns the user to the Publication Properties DE form without saving the changes. The user can then enter a Published From date.
- 2. Clicking No saves the publication with a Publish From date, and continues carries out the action when saving the record was initiated.

C:\Users\Tom\Documents\WorkArchives\PMGSoftware\KXFiles\Modules\Portal10\kx\specs\pm.portal.fds.v01.20.doc © 2003 RealLegal / Law.com Holdings Inc., Rev. No. 4 Publications - Use Cases ● 294

EXTENSION - DEACTIVATE CONFIRMATION

Upon saving a deactivated publication, the Deactivate Confirmation dialog box appears:

- 1. Clicking Yes proceeds with deactiving the publication.
- 2. Clicking **No** returns the user to the **Folder Properties** DE form, where the publication can be activated using one of the **Activation Steps**.

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Clicking Cancel returns the user to the Publication Properties window without saving or discarding the changes.

RELATED INFORMATION

Priority	High.
Performance	Fast.
Frequency	Frequency is determined by the extent to which firms use portals.
Open Issues	None.
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	n/a
Superordinates	8.1 Publishing Items 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.2 Publishing Items – Modify Existing Publication 8.1.5 Publishing Items – Delete Existing Publication
Subordinates	12.1.5 Select Portal Image 12.1.11 Select Publication Source

8.1.2. Publishing Items – Modify Existing Publication [Ph1]

Goal in Context	Modify a publication record from a Publications Listing , or by opening the Publication Properties DE form from a publication field, as as the Source field on the Subscription Properties DE form.
Scope & Level	The scope of this use case carries out the Goal in Context in full using the Publication Properties DE form.
Preconditions	The publication exists.
Success End Condition	The publication record is updated.
Failed End Condition	The publication record is not updated.
Primary Actors	Intermediate to advanced users responsible for publishing items that can be made available for subscription on portals.
Secondary Actors	None.
Trigger	The user wants to update an existing publication.

STEPS - METHOD 1 (FROM PUBLICATION FIELD)

- 1. Click on the **Open** button for the publication field:
- 2. The Publication Properties DE form appears in the following state:
 - **a.** The data fields are appropriate for the selected item item.
 - **b.** The fields are populated with the values last saved.
- **3.** Complete/modify the fields on the form as needed.
- 4. Click Save or switch to the Portals tabs, the record is saved/updated.
- **5.** Assign the publication to **Portals**, as needed.
- **6.** Close when finished.

STEPS - METHOD 2 (FROM A PUBLICATION LISTING)

- 7. Highlight the publication to be modified.
- 8. Choose Open.
 - a. Click the Open button.
 - b. Press Ctrl+O.
 - **c.** Right click on the publication and choose **Open** from the pop-up menu.
 - **d.** Double-click on the publication.
- 9. The Publication Properties DE form appears in the following state:
- **10.** The **Publication Properties** DE form appears in the following state:
 - **a.** The data fields are appropriate for the selected item item.
 - **b.** The fields are populated with the values last saved.
- 11. Complete/modify the fields on the form as needed.
- 12. Click Save or switch to the Portals tabs, the record is saved/updated.
- **13.** Assign the publication to **Portals**, as needed.
- 14. Close when finished.

EXTENSION - SELECT DATA RECORD

If the user chooses a data record type – Matter, Entity, Document, Note, Timeslip or Workflow, Use the following procedure to populate the Source field.

- Click the lookup button immediately to the right of the Source field. The Practice Manager Select window corresponding to the selected data type appears.
- 2. Locate the record you want to publish, and click Select.
 - a. If the record has not been published, the remaining fields are null.
 - **b.** If the record is already published, the fields are populated with the data from the last time the publication was saved.

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EXTENSION - SELECT DEFAULT IMAGE

To select a **Default Image**, carry out one of the following:

- **1.** Enter the code of the image, and press **Tab**.
 - **a.** If the image is found, the code field is populated with the image code and description field is populated with the image description.
 - b. If the image is not found, the words Record Not Found appear in the image code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Image** window appears. Choose an image, and click **Select**. The code field is populated with the image code and description field is populated with the image decription.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Publication Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- 3. The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - NO PUBLICATION DATE ENTERED

Upon saving the publication, if no **Published From** date has been entered, a dialog box appears.

- Clicking Yes returns the user to the Publication Properties DE form without saving the changes. The user can then enter a Published From date.
- Clicking No saves the publication with a Publish From date, and continues carries out the action when saving the record was initiated.

EXTENSION - DEACTIVATE CONFIRMATION

Upon saving a deactivated publication, the **Deactivate Confirmation** dialog box appears:

- 1. Clicking Yes proceeds with deactiving the publication.
- 2. Clicking **No** returns the user to the **Folder Properties** DE form, where the publication can be activated using one of the **Activation Steps**.

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Clicking Cancel returns the user to the Publication Properties window without saving or discarding the changes.

RELATED INFORMATION

Priority	High.
Performance	Fast.
Frequency	Frequency is determined by the extent to which firms use portals.
Open Issues	None.
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	n/a
Superordinates	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.3 Publishing Items – Assign Publication to Portals 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication
Subordinates	12.1.5 Select Portal Image 12.1.11 Select Publication Source

8.1.3. Publishing Items – Assign Publication to Portals [Ph1]

Goal in Context	Assign the item to portals so that they can subscribe to it.
Scope & Level	The scope of this use case carries out the Goal in Context in full using the Publication Properties DE form.
	Assignment may also be carried out through other Practice Manager assignment mechanisms.
Preconditions	The Publication Properties DE form is active.
Success End	The item is related to the selected portals.
Condition	If the item was an entity, the entity role for all applicable portal types (those of the selected portals) was confirmed or created, and the entity was related to the selected portals using that role.
Failed End Condition	The item was not related to the selected portals.
	If the item was an entity, the entity role for all applicable portal types (those of the selected portals) was not confirmed or created.
	If the item was an entity, the entity was not related to the selected portals using the role.
	If the item was an entity, the entity was related to the selected portals using the incorrect role.
Primary Actors	Intermediate to advanced users responsible for publishing items that can be made available for subscription on portals.
Secondary Actors	Beginning users who have a solid understanding of Practice Manager object relationships.
	System or data administrators.
Trigger	The user wants to publish an existing item so that it can be used on a portal.

STEPS

Use the following procedure to assign the publication to one or more portals:

- 1. Click on the **Portals** tab. The assignment window appears in the following state:
 - **a.** The **Site Type** field defaults to the portal site type.
 - b. ANY is selected for the Site field.
 - c. ANY is selected for the Portal Type field.
 - **d.** If the **Source** data record is an entity, the **Entity Role** field appears.
 - **e.** The list of portals the publication was previously assigned to appears in the **Assigned Portals** listing. This could be the result of auto-publishing rules, or the fact that the **Source** record, itself, is already related to portals.
 - f. The Available Portals window contains a list of portals that the publication may be published to.
 - g. The Assign (>), Assign All (>>), and Subscribe buttons are disabled until a portal on the Assigned Portals listing is selected.
 - h. The Unassign (<) and Unassign All (<<) are disabled until a portal on the Available Portals listing is selected.</p>
 - i. The Print List button is enabled.

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- 2. Filter the Available Portals and Assigned Portals listings:
 - a. Choose a specific portal Site, or click ANY to show portals for any site.
 - **b.** Choose a specific **Portal Type**, or click **ANY** to show portals of all types.
- 3. If the **Source** data record is an entity, choose ann **Entity Role** to use when assigning the entity to the portal.
- As needed, modify the Available Portals and Assigned Portals listings to better locate portals to assign.
- 5. Move Available Portals to the Assigned Portals listing to add them to the grid.
 - a. Double-click on a portal on the Available Portals listing.
 - b. Highlight and drag a portal from the Available Portals listing o the Assigned Portals listing.
 - c. Highlight a portal on the Available Portals listing, and click Assign (>).
 - **d.** Highlight a portal on the **Available Portals** listing, hold the **Control** key down, click on addition portals, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 6. Move Assigned Portals to the Available Portals listing to remove them to the grid.
 - a. Double-click on a portal on the Assigned Portals listing.
 - **b.** Highlight and drag a portal from the **Assigned Portals** listing to the **Available Portals** listing.
 - **c.** Highlight a portal on the **Assigned Portal** listing, and click **Unassign (<)**.
 - **d.** Highlight a portal on the **Assigned Portal** listing, hold the **Control** key down, click on addition portals, and then click **Unassign (<)**.
 - e. Click Unassign All (<<).
- **7.** Proceed as follows:
 - **a.** As needed, subcribe to the published item on an **Assigned Portals** listing by highlighting the portal and clicking **Subscribe**.
 - **b.** Print the Publication Listing.

EXTENSION - ASSIGN TO PORTALS - SORT THE LISTING

To sort the style listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

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EXTENSION - ASSIGN TO PORTALS - HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- 2. Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - a. To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION – ASSIGN TO PORTALS – MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- **3.** To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION – SUBSCRIBE THE PUBLICATION FOR A PORTAL

Use the following procedure to add a subscription to a portal for the active publication.

- 1. Highlight the portal in the Assigned Portals listing.
- 2. Choose Subscribe:
 - **a.** Right-click on the portal, and choose **Subscribe** from the pop-up menu.
 - b. Click on the Subscribe button.
- 3. The Subscription Properties window appears.
- 4. Complete the subscription information, save it, and close the window.
- **5.** The **Publication Properties** DE form appears.

EXTENSION – LIST ASSIGNMENTS

Use the following procedure to view a listing of assignments for the publication:

- 1. Click Listing.
- 2. The Publication Properties Assignment Listing appears in the following state:
 - a. Show All Assignments is selected, and in focus.
 - b. Include Subscription Info is not selected.
 - c. Print List, Filter and Close buttons are enabled.
 - d. Remove is disabled.
- 3. Proceed as follows:
 - a. Filter the listing as needed.
 - **b.** Print the list of assignments.
 - c. Remove assignments.

4. When finished, click Close. The Publication Properties DE form appears.

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RELATED INFORMATION

Priority	High.
Performance	Fast.
Frequency	Frequency is determined by the extent to which firms use portals.
Open Issues	None.
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	n/a
Superordinates	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication
Subordinates	10.8 Manage Publications Use Cases 10.8.1 Manage Publications – List Publications 6.3.1 Manage Subscriptions – Subscribe to a Publication 6.3.2 Manage Subscriptions – Modify a Subscription 6.3.4 Manage Subscriptions – Delete Subscription

8.1.4. Publishing Items – Activate/Deactivate Publication [Ph1]

Goal in Context	Activating and deactivating a publication.		
Scope & Level	If the publication is active, deactivating it is the use case. If the publication is deactivated, activating it is the use case.		
Preconditions	The publication has been created. The Publication Listing is active or the Publication Properties window is active. The publication is either active or deactivated.		
Success End Condition	If deactivated, the publication is activated and available for subscribing If active, the publication is deactivated and not available for subscribing.		
Failed End Condition	If deactivated, the publication remains deactivated and is not available for subscribing. If active, the publication remains activated and is available for subscribing.		
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.		
Secondary Actors	None.		
Trigger	The user chooses to activate or deactivate a publication.		

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ACTIVATION STEPS

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There are four conditions as to why a publication would be deactivated:

- 1. The **Deactivated** field on the **Profile** page is checked.
 - a. To activate from the Publications Listing tree, highlight the publication click Activate on the Publications Listing tool bar.
 - **b.** To activate from the **Publications Listing** tree, right-click on the publication and choose **Activate** from the pop-up menu.
 - C. To activate from the Publication Properties DE form, uncheck this field, then save the publication.
- 2. The Publish From date field on the Profile page is null.
 - a. To activate from the Publication Properties DE form, enter today's date or a date in the past, then save the publication.
- 3. The **Publish From** date field on the **Profile** page is in the future.
 - **a.** To activate from the **Publication Properties** DE form, change the date to today's date or a date in the past, then save the publication.
- 4. The Publish To date field on the Profile page is in the past.
 - **a.** To activate from the **Publication Properties** DE form, change the date to today's date, a date in the future, or clear the **Publish To** field, then save the publication.

DEACTIVATION STEPS

There are three conditions as to why a publication would be activate:

- 1. The **Deactivated** field on the **Profile** page is not checked.
 - a. To deactivate from the Publications Listing tree, highlight the publication and click Deactivate on the Publications Listing tool bar.
 - **b.** To deactivate from the **Publications Listing** tree, right-click on the publication and choose **Deactivate** from the pop-up menu.
 - C. To deactivate from the Publication Properties DE form, check this field, then save the publication.
- 2. The Publish From date field on the Profile page is in the past.
 - **a.** To deactivate from the **Publication Properties** DE form, clear the **Publish From** date field or change the date to a date in the future, then save the publication.
- 3. The Publish To date field on the Profile page is in the future.
 - a. To deactivate from the Publication Properties DE form, change the date to a date in the past, then save the publication.

EXTENSION – DEACTIVATE CONFIRMATION

Upon saving a deactivated publication, the **Deactivate Confirmation** dialog box appears:

- 1. Clicking **Yes** proceeds with deactiving the publication.
- **2.** Clicking **No** returns the user to the **Publication Properties** DE form, where the publication can be activated using one of the **Activation Steps**.

RELATED INFORMATION

Priority	High
Performance	< 1 minute for the experienced user.
Frequency	Depends on firms usage of portals.
Channels to Actors	Portal Menu. Publication Properties DE form.
Open Issues	None
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication
Subordinates	None.

Publishing Items – Delete Existing Publication [Ph1] 8.1.5.

Goal in Context	Delete an existing publication.		
Scope & Level	Portal Settings		
Preconditions	The user has security clearance to administer portal settings.		
	General Portal Settings have been entered and saved.		
	The Portal Settings window is open.		
	The publication to be deleted exists.		
	The publication is not used by any active portals, folders, or themes.		
	The publication to be deleted is either on the Publication listing (Method 1), or the Publication Properties DE form for the publication to be deleted is open (Method 2).		
Success End Condition	The publication is deleted and no longer available for use in portals, folders, or themes.		
Failed End Condition	The publication is not deleted.		
Primary Actors	System Administrator		
Secondary Actors	Intermediate to advanced user who has an understanding of how portal publications are used.		
Trigger	Use chooses to delete an existing publication that is not longer in use.		

STEPS - METHOD 1 (DELETE FROM LISTING)

- 1. Highlight the publication to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - a. To delete the publication, click Yes. The dialog box closes and the publication is deleted.

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b. To keep the publication, click **No**. The dialog box closes, and the publication remains on the listing.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- 2. A dialog box appears.
 - **a.** To delete the publication, click **Yes**. The dialog box and DE form close. The publication is deleted, and the **Publications** listing appears.
 - **b.** To keep the publication, click **No**. The dialog box closes, and the **Publication Properties** DE form remains open.

EXTENSION - PUBLICATION IN USE

- 1. After choosing to delete the publication, the system checks to see if the publication is in use by a portal, folder, or theme.
- 2. If the publication is in use, a dialog box appears, advising the user the publication is in use and cannot be deleted.
- 3. Clicking **OK** closes the dialog box and returns the user to the form from which they chose **Delete**, either the **Publications** listing or the **Publication Properties** DE form.

RELATED INFORMATION

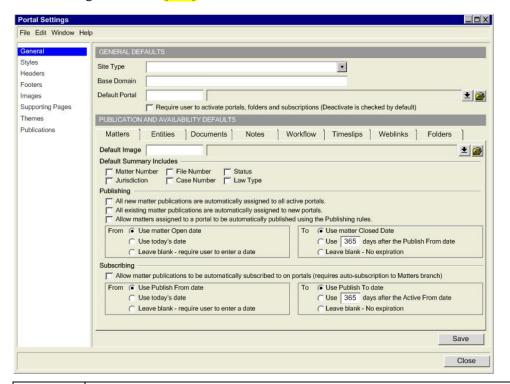
Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Publications tab. Publication Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	8.1 Publishing Items 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication
Subordinates	None.

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Portal Settings

9. Mockups – Portal Settings

9.1. Portal Settings – General [Ph1]



General	Description		
HelpID	PortalSettings.General		
Title	Portal Settings → General		
Usage	Use to define general portal settings, including several default values for use on all portals.		
	This form is also used for defining default publication and subscription rules for folders and Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:		
	 9.2 Portal Settings – General – Matters (tab properties only) 9.3 Portal Settings – General – Entities (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only) 		
Туре	Standard DE form with nested tabs		
Open Focus	First Time – Site Type After First Time – Close		
Tab Order	First Time 1. Base Domain		

General	Description
	2. Default Portal – Code 3. Default Portal – Lookup 4. Default Portal – Open 5. Require user to activate portals, folders and subscriptions (Deactivated is checked by default) 6. Save 7. Close 8. Site Type After First Time
	 Default Portal – Code Default Portal – Lookup Default Portal – Open Require user to activate portals, folders and subscriptions (Deactivated is checked by default) Save Close
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.7.4 Manage Themes – Modify Existing Theme 12.1.5 Select Portal Image 12.1.1 Select Portal
Phasing Considerations	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.

General Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Portal Settings window. Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).	PortalSettings.General.Close	
Default Portal – Lookup	Displays the Select Portal window, which can be used to select a value for the Portal field.	PortalSettings.General.DefaultPortalLookup	
Default Portal – Open	Opens the Portal Properties window for the selected portal.	PortalSettings.General.DefaultPortalOpen	
Save	Saves any changes made to the General page. The window remains open after clicking Save . If the user then wants to apply the saved changes, they can click Close .	PortalSettings.General.Save	

General Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Base Domain	This is the base domain of the site in which all portals will reside. While this field is not required, it must be populated before the portal can be	Text	Null	N	N	PortalSettings.Gene ral.BaseDomainNa me	
	presented as a Web page.						
Default Portal	Consists of Portal Code and Description fields.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Portal	
	The first field searches for the portal based on code.						
	The second field is a read-only description of the portal.						
	The look-up button displays Select Portal window.						
Require user to activate portals, folders and subscription (Deactivated is checked by default)	When portals, folders or subscriptions are created, the Deactivated checkbox is automatically selected, preventing the item from being presented on the portal, even if Active From is in the past and Active To date is in the future.	Checkbox	No	N	N	PortalSettings.Gene ral.DeactiveDefault	

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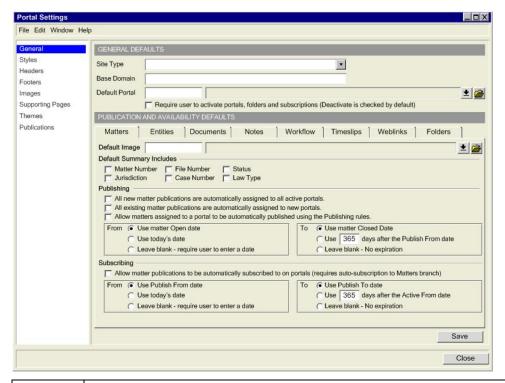
General Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Site Type	This is the Site Type for portal matter sites. The selected Site Type for Portals is	Drop-down List:	Null	Υ	Υ	PortalSettings.Gene ral.SiteTypeforPorta Is	
	used to tell the presentation layer what matter records are to be used as portals. All matters created for sites of the selected site type are eligible to be viewed as portals.						
	The Site Type must be existing before it can be selected (Site Types are maintained through Site Settings or Security Settings – Sites).						
	This field becomes read-only once the Portal Settings have been saved, and the window is closed the first time.						

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.
1.02	03/05/2002	TAF	Added Publish From, Publish To, Active From, and Active To defaults.
1.03	03/06/2002	TAF	Updated definitions of Active From and Active To defaulit settings to allow them to also be based on the Publish From and Publish To dates.
1.10	03/18/2002	TAF	Final mockup for development review and coding.
1.11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.

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9.2. Portal Settings – General – Matters (tab properties only) [Ph1]



General	Description			
HelpID	PortalSettings.General.Matters			
Title	Portal Settings → General → Matters			
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:			
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist			
	The Matters tab is used for defining default publication and subscription rules for matters.			
	Other tabs are used for defining default publication and subscription rules for folders and other Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:			
	 9.3 Portal Settings – General – Entities (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only) 			
Туре	Standard DE form with nested tabs			
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General.			
	For the Matters tab – Default Image – Code			
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Matters tab:			
	 Default Image – Lookup Default Image – Open 			

General	Description
	Default Summary Includes – Matter Number
	4. Default Summary Includes – File Number
	5. Default Summary Includes – Status
	6. Default Summary Includes – Jurisdication
	7. Default Summary Includes – Case Number
	8. Default Summary Includes – Law Type
	9. New matter publications are automatically assigned to all active portals.
	10. All matter publications are automatically assigned to new portals.
	11. Allow matters assigned to a portal to be automatically published using the Publishing rules.
	12. Publishing – From – Use matter Open date
	13. Publishing – From – Use today's date
	14. Publishing – From – Leave blank - require user to enter a date
	15. Publishing – To – Use matter Closed date
	16. Publishing – To – Use ### days after the Publish From date
	17. Publishing – To – Leave blank – No Expiration
	Allow matter publications to be automatically subscribed to on portals (requires auto-subscription to Matters branch)
	19. Subscribing – From – Use Publish From date
	20. Subscribing – From – Use today's date
	21. Subscribing – From – Leave blank - require user to enter a date
	22. Subscribing – To – Use Publish To date
	23. Subscribing – To – Use ### days after the Active From date
	24. Subscribing – To – Leave blank
	25. Default Image – Code
Related Use Cases	For use cases, see 9.1 Portal Settings – General.
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.

Matter tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	Displays the Select Image window, which can be used to select a value for the Default Image field for matter publications and subscriptions.	PortalSettings.General.Matters.DefaultImageLookup	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Matters.DefaultImageOpen	

Matter tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All existing matter publications are automatically assigned to new portals.	When checked, if a new portal is created, all active matter publications are automatically assigned to that portal.	Checkbox	N	N	N	PortalSettings.Gene ral.Matters.AutoPubt oNewPortal	

Matter tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All new matter publications are automatically assigned to all active portals.	When checked, the default is to assign a new matter publication to all active portals. The user will have to remove portals they don't want the item to be available for.	Checkbox	N	N	N	PortalSettings.Gene ral.Matters.AutoPubt oActivePortals	
	When not checked, the default is to leave assignments as they are when the item is published. The user can then manually assign any additional portals.						
Allow matter publications to be automatically subscribed to (requires an autosubscription to the Matters branch)	When checked, the user may configure a portal to allow matters assigned to the portal to be automatically subscribed to. This functionality requires that the Matter branch of the publications (related) tree have an autosubscription defined.	Checkbox	N	N	N	PortalSettings.Gene ral.Matters.Autosub scribePublications	
Allow matters assigned to a portal to be automatically published using the Publishing rules.	When checked, assigning a matter to a portal automatically publishes that matter to the portal, using the Publishing – From and Publishing – To date rules. The Default Image from the is also used.	Checkbox	N	N	N	PortalSettings.Gene ral.Matters.AutoPub PortalAsssignments	

Matter tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Image	This is the image that will be used as the default when the matter is published, as well as in autosubscriptions.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Matters.DefaultI mage	
	Consists of Image Code and Description fields.						
	The first field searches for the images based on code.						
	The second field is a read-only description of the image.						
	The look-up button displays Select Image window.						
Default Summary Includes – Case Number	When checked, the matter Case Number is included in the Summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Matters.Includes. CaseNumber	
Default Summary Includes – File Number	When checked, the matter File Number is included in the Summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Matters.Includes. FileNumber	
Default Summary Includes – Jurisdication	When checked, the matter Jurisdication description/name is included in the Summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Matters.Includes. Jurisdication	
Default Summary Includes – Law Type	When checked, the matter Law Type is included in the Summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Matters.Includes. LawType	
Default Summary Includes – Matter Number	When checked, the Matter Number is included in the Summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Matters.Includes. MatterNumber	
Default Summary Includes – Status	When checked, the matter Status description is included in the Summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Matters.Includes. Status	
Publishing – From – Leave blank – require user to enter a date	When matter publications are created, the Publish From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Publishing From set	No	Υ	Υ	PortalSettings.Gene ral.Matters.PublishF rom.Blank	

Last Updated: 07/15/2003

Matter tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Publishing – From – Use matter Open date	When matter publications are created, the Publish From date field defaults to the matter Date Opened date from the published matter DE form. If there is no value in	Option – 1 of 3 in Publishing From set	Yes	Y	Y	PortalSettings.Gene ral.Matters.PublishF rom.Opened	
	the Date Opened field, the Publish From field is null, and automatically updated when a Date Opened value is entered.						
Publishing – From – Use today's date	When matter publications are created, the Publish From date field defaults to today's date.	Option – 2 of 3 in Publishing From set	No	Y	Υ	PortalSettings.Gene ral.Matters.PublishF rom.Default	
Publishing – To – Default to ### days after the Publish From date	When matter publications are created, the Publish To date field defaults to a calculated value based on the Publish From date, plus the number of days indicated in this field.	Option – 2 of 3 in Publishing To set Number	No 365	Y	Υ	PortalSettings.Gene ral.Matters.PublishT o.Days	
Publishing – To – Leave blank – No Expiration	When matter publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Publishing From set	No	Y	Υ	PortalSettings.Gene ral.Matters.PublishT o.Blank	
Publishing – To – Use matter Closed date	When matter publications are created, the Publish To date field defaults to the matter Date Closed date from the published matter DE form. If there is no value in the Date Closed field, the Publish To field is null, and automatically updated when a Date Closed value is entered.	Option – 1 of 3 in Publishing From set	Yes	Y	Υ	PortalSettings.Gene ral.Matters.PublishT o.Closed	

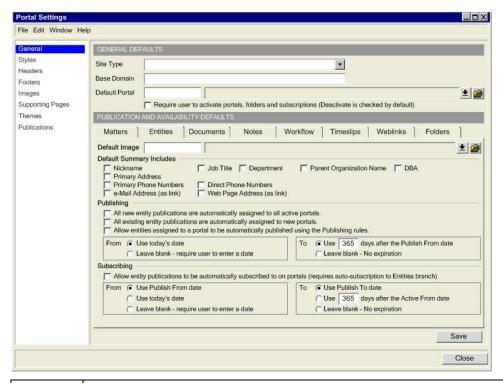
Matter tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Subscribing – From – Leave blank – require user to enter a date	When matter subscriptions are created, the Active From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Matters.Subscrib eFrom.Blank	
Subscribing – From – Use Publish From Date	When matter subscriptions are created, the Active From date field defaults to the Publish From date of the matter.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Matters.Subscrib eFrom.PublishFrom	
Subscribing – From – Use today's date	When matter subscriptions are created, the Active From date field defaults to today's date.	Option – 2 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Matters.Subscrib eFrom.Default	
Subscribing – To – Default to ### days after the Active From date	When matter subscriptions are created, the Active To date field defaults to a calculated value based on the Active From date, plus the number of days indicated in this field.	Option – 2 of 3 in Subscribing To set Number	No 365	Υ	Υ	PortalSettings.Gene ral.Matters.Subscrib eTo.Days	
Subscribing – To – Leave blank – No Expiration	When matter subscriptions are created, the Active To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Matters.Subscrib eTo.Blank	
Subscribing – To – Use Publish To date	When matter subscriptions are created, the Active To date field defaults to the Publish To date of the matter.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Matters.Subscrib eTo.PublishTo	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description			
1.10	03/18/2002	TAF	Original Mockup			
1.11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.			

Printed: 06/12/2018 Last Updated: 07/15/2003

9.3. Portal Settings – General – Entities (tab properties only) [Ph1]



General	Description
HelpID	PortalSettings.General.Entities
Title	Portal Settings → General → Entities
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist
	The Entities tab is used for defining default publication and subscription rules for entities.
	Other tabs are used for defining default publication and subscription rules for folders and other Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:
	 9.2 Portal Settings – General – Matters (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only)
Туре	Standard DE form with nested tabs
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General. For the Entities tab – Default Image – Code
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Entities tab: 1. Default Image – Lookup 2. Default Image – Open

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General	Description
	Default Summary Includes – Nickname
	4. Default Summary Includes – Job Title
	5. Default Summary Includes – Department
	6. Default Summary Includes – Parent Organization Name
	7. Default Summary Includes – DBA
	8. Default Summary Includes – Primary Address
	9. Default Summary Includes – Primary Phone Numbers
	10. Default Summary Includes – Direct Phone Numbers
	11. Default Summary Includes – e-Mail Address
	12. Default Summary Includes – Web Page Address
	13. New entity publications are automatically assigned to all active portals.
	14. All entity publications are automatically assigned to new portals.
	15. Allow entities assigned to a portal to be automatically published using the Publishing rules.
	16. Publishing – From – Use today's date
	17. Publishing – From – Leave blank - require user to enter a date
	18. Publishing – To – Use ### days after the Publish From date
	19. Publishing – To – Leave blank – No Expiration
	20. Allow entity publications to be automatically subscribed to on portals (requires auto-subscription to Entities branch)
	21. Subscribing – From – Use Publish From date
	22. Subscribing – From – Use today's date
	23. Subscribing – From – Leave blank - require user to enter a date
	24. Subscribing – To – Use Publish To date
	25. Subscribing – To – Use ### days after the Active From date
	26. Subscribing – To – Leave blank
	27. Default Image – Code
Related Use Cases	For use cases, see 9.1 Portal Settings – General.
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.

Entity tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	Displays the Select Image window, which can be used to select a value for the Default Image field for entity publications and subscriptions.	PortalSettings.General.Entities.DefaultImageLookup	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Entities.DefaultImageOpen	

Entity tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All existing entity publications are automatically assigned to new portals.	When checked, if a new portal is created, all active entity publications are automatically assigned to that portal.	Checkbox	N	N	N	PortalSettings.Gene ral.Entities.AutoPubt oNewPortal	

Entity tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All new entity publications are automatically assigned to all active portals.	When checked, the default is to assign a new entity publication to all active portals. The user will have to remove portals they don't want the item to be available for. When not checked, the	Checkbox	N	N	N	PortalSettings.Gene ral.Entities.AutoPubt oActivePortals	
	default is to leave assignments as they are when the item is published. The user can then manually assign any additional portals.						
Allow entities assigned to a portal to be automatically published using the Publishing rules.	When checked, assigning a entity to a portal automatically publishes that entity to the portal, using the Publishing – From and Publishing – To date rules.	Checkbox	N	N	N	PortalSettings.Gene ral.Entities.AutoPub PortalAsssignments	
	The Default Image from the is also used.						
Allow entity publications to be automatically subscribed to (requires an auto- subscription to the	When checked, the user may configure a portal to allow entities assigned to the portal to be automatically subscribed to.	Checkbox	N	N	N	PortalSettings.Gene ral.Entities.Autosubs cribePublications	
Entities branch)	This functionality requires that the Entity branch of the publications (related) tree have an autosubscription defined.						

Entity tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Image	This is the image that will be used as the default when the entity is published, as well as in auto-subscriptions. Consists of Image	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Entities.DefaultI mage	
	Code and Description fields.						
	The first field searches for the images based on code.						
	The second field is a read-only description of the image.						
	The look-up button displays Select Image window.						
Default Summary Includes – DBA	When checked, the entity's DBA is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. DBA	
	This field is only available for organization entities on the Publication Properties DE form.						
Default Summary Includes – Department	When checked, the entity's Department is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. Department	
	This field is only available for individual entities on the Publication Properties DE form.						
Default Summary Includes – Direct Phone Numbers	When checked, the entity's Direct Phone Numbers are included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. DirectPhoneNumber s	
Default Summary Includes – e-Mail Address	When checked, the entity's e-Mail Address is included in the summary as a hyperlink.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. e-MailAddress	

Entity tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Summary Includes – Job Title	When checked, the entity's Job Title is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. JobTitle	
	This field is only available for individual entities on the Publication Properties DE form.						
Default Summary Includes – Nickname	When checked, the entity's Nickname is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. Nickname	
	This field is only available for individual entities on the Publication Properties DE form.						
Default Summary Includes – Parent Organization Name	When checked, the entity's Parent Organization Name is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. ParentOrganization Name	
Default Summary Includes – Primary Address	When checked, the entity's Primary Address is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. PrimaryAddress	
Default Summary Includes – Primary Phone Numbers	When checked, the phones numbers from the entity's Primary Address are included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. PrimaryPhoneNumb ers	
Default Summary Includes – Web Page Address	When checked, the entity's Web Page Address is included in the summary as a hyperlink.	Checkbox	Null	N	N	PortalSettings.Gene ral.Entities.Includes. WebPageAddress	
Publishing – From – Leave blank – require user to enter a date	When entity publications are created, the Publish From date field is left blank, requiring the user to enter a date.	Option – 2 of 2 in Publishing From set	No	Y	Y	PortalSettings.Gene ral.Entities.PublishF rom.Blank	
Publishing – From – Use today's date	When entity publications are created, the Publish From date field defaults to today's date.	Option – 1 of 2 in Publishing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Entities.PublishF rom.Default	

Entity tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Publishing – To – Default to ### days after the Publish From date	When entity publications are created, the Publish To date field defaults to a calculated value based on the Publish From date, plus the number of days indicated in this field.	Option – 1 of 2 in Publishing To set Number	Yes 365	Y	Υ	PortalSettings.Gene ral.Entities.PublishT o.Days	
Publishing – To – Leave blank – No Expiration	When entity publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 2 of 2 in Publishing From set	No	Y	Y	PortalSettings.Gene ral.Entities.PublishT o.Blank	
Subscribing – From – Leave blank – require user to enter a date	When entity subscriptions are created, the Active From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Subscribing From set	No	Υ	Y	PortalSettings.Gene ral.Entities.Subscrib eFrom.Blank	
Subscribing – From – Use Publish From Date	When entity subscriptions are created, the Active From date field defaults to the Publish From date of the entity.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Y	PortalSettings.Gene ral.Entities.Subscrib eFrom.PublishFrom	
Subscribing – From – Use today's date	When entity subscriptions are created, the Active From date field defaults to today's date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Entities.Subscrib eFrom.Default	
Subscribing – To – Default to ### days after the Active From date	When entity subscriptions are created, the Active To date field defaults to a calculated value based on the Active From date, plus the number of days indicated in this field.	Option – 2 of 3 in Subscribing To set Number	No 365	Υ	Y	PortalSettings.Gene ral.Entities.Subscrib eTo.Days	
Subscribing – To – Leave blank – No Expiration	When entity subscriptions are created, the Active To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Entities.Subscrib eTo.Blank	

Entity tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Subscribing – To – Use Publish To date	When entity subscriptions are created, the Active To date field defaults to the Publish To date of the entity.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Entities.Subscrib eTo.PublishTo	

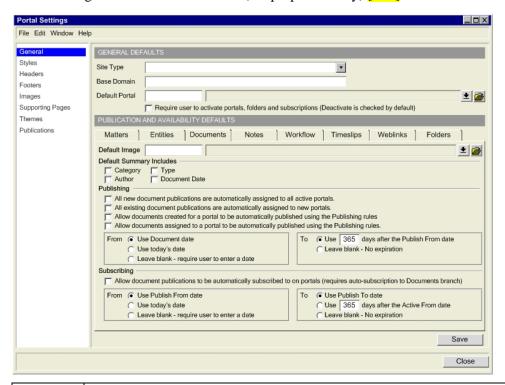
Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Original Mockup
1.11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.

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Last Updated: 07/15/2003

9.4. Portal Settings – General – Documents (tab properties only) [Ph1]



General	Description
HelpID	PortalSettings.General.Documents
Title	Portal Settings \rightarrow General \rightarrow Documents
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist
	The Documents tab is used for defining default publication and subscription rules for documents.
	Other tabs are used for defining default publication and subscription rules for folders and other Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:
	 9.2 Portal Settings – General – Matters (tab properties only) 9.3 Portal Settings – General – Entities (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only)
Туре	Standard DE form with nested tabs
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General. For the Documents tab – Default Image – Code
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Documents tab: Default Image – Lookup Default Image – Open

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General	Description
	Default Summary Includes – Category
	4. Default Summary Includes – Type
	5. Default Summary Includes – Author
	6. Default Summary Includes – Date
	7. New document publications are automatically assigned to all active portals.
	8. All document publications are automatically assigned to new portals.
	9. Allow documents created for the portal to be automatically published using the Publishing rules.
	10. Allow documents assigned to a portal to be automatically published using the Publishing rules.
	11. Publishing – From – Use Document date
	12. Publishing – From – Use today's date
	13. Publishing – From – Leave blank - require user to enter a date
	14. Publishing – To – Use ### days after the Publish From date
	15. Publishing – To – Leave blank – No Expiration
	16. Allow document publications to be automatically subscribed to on portals (requires auto-subscription to Documents branch)
	17. Subscribing – From – Use Publish From date
	18. Subscribing – From – Use today's date
	19. Subscribing – From – Leave blank - require user to enter a date
	20. Subscribing – To – Use Publish To date
	21. Subscribing – To – Use ### days after the Active From date
	22. Subscribing – To – Leave blank
	23. Default Image – Code
Related Use Cases	For use cases, see 9.1 Portal Settings – General.
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.

Document tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	, ,	PortalSettings.General.Documents.DefaultImageLoo kup	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Documents.DefaultImageOpe n	

Document tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All existing document publications are automatically assigned to new portals.	When checked, if a new portal is created, all active document publications are automatically assigned to that portal.	Checkbox	N	N	N	PortalSettings.Gene ral.Documents.Auto PubtoNewPortal	

Document tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All new document publications are automatically assigned to all active portals.	When checked, the default is to assign a new document publication to all active portals. The user will have to remove portals they don't want the item to be available for. When not checked, the default is to leave assignments as they are when the item is published. The user can then manually assign any additional portals.	Checkbox	N	N	N	PortalSettings.Gene ral.Documents.Auto PubtoActivePortals	
Allow document publications to be automatically subscribed to (requires an autosubscription to the Documents branch)	When checked, the user may configure a portal to allow documents assigned to the portal to be automatically subscribed to. This functionality requires that the Document branch of the publications (related) tree have an auto-subscription defined.	Checkbox	N	N	N	PortalSettings.Gene ral.Documents.Auto subscribePublicatio ns	
Allow documents assigned to a portal to be automatically published using the Publishing rules.	When checked, assigning a document to a portal automatically publishes that document to the portal, using the Publishing – From and Publishing – To date rules. The Default Image from the is also used.	Checkbox	N	N	N	PortalSettings.Gene ral.Documents.Auto PubPortalAsssignm ents	
Allow documents created for a portal to be automatically published using the Publishing rules	When checked, creating a document for a portal automatically publishes that document to the portal, using the Publish From and Publish To date rules. The Default Image from the is also used.	Checbox	N	N	N	PortalSettings.Gene ral.Documents.Auto PubPortalItems	

Document tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Image	This is the image that will be used as the default when the document is published, as well as in autosubscriptions.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Documents.Defa ultImage	
	Consists of Image Code and Description fields.						
	The first field searches for the images based on code.						
	The second field is a read-only description of the image.						
	The look-up button displays Select Image window.						
Default Summary Includes – Author	When checked, the Author name from the document Profile is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Documents.Inclu des.Author	
Default Summary Includes – Category	When checked, the Category description from the document Profile is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Documents.Inclu des.Category	
Default Summary Includes – Date	When checked, the Date from the document Profile is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Documents.Inclu des.Date	
Default Summary Includes – Type	When checked, the Type description from the document Profile is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Documents.Inclu des.Type	
Publishing – From – Leave blank – require user to enter a date	When document publications are created, the Publish From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Publishing From set	No	Y	Y	PortalSettings.Gene ral.Documents.Publi shFrom.Blank	

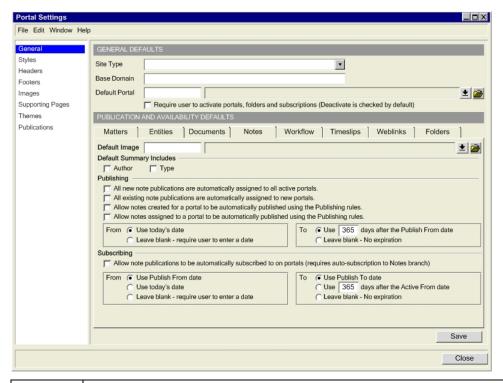
Document tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Publishing – From – Use Document date	When document publications are created, the Publish From date field defaults to the document Date Opened date from the published document DE form. If there is no value in the Date Opened field, the Publish From field	Option – 1 of 3 in Publishing From set	Yes	Y	Y	PortalSettings.Gene ral.Documents.Publi shFrom.DocDate	
	is null, and automatically updated when a Date Opened value is entered.						
Publishing – From – Use today's date	When document publications are created, the Publish From date field defaults to today's date.	Option – 2 of 3 in Publishing From set	No	Υ	Υ	PortalSettings.Gene ral.Documents.Publi shFrom.Default	
Publishing – To – Default to ### days after the Publish From date	When document publications are created, the Publish To date field defaults to a calculated value based on the Publish From date, plus the number of days indicated in this field.	Option – 1 of 2 in Publishing To set Number	Yes 365	Y	Y	PortalSettings.Gene ral.Documents.Publi shTo.Days	
Publishing – To – Leave blank – No Expiration	When document publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 2 of 2 in Publishing From set	No	Υ	Y	PortalSettings.Gene ral.Documents.Publi shTo.Blank	
Subscribing – From – Leave blank – require user to enter a date	When document subscriptions are created, the Active From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Documents.Subs cribeFrom.Blank	
Subscribing – From – Use Publish From Date	When document subscriptions are created, the Active From date field defaults to the Publish From date of the document.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Documents.Subs cribeFrom.PublishFr om	

Document tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Subscribing – From – Use today's date	When document subscriptions are created, the Active From date field defaults to today's date.	Option – 2 of 3 in Subscribing From set	No	Y	Y	PortalSettings.Gene ral.Documents.Subs cribeFrom.Default	
Subscribing – To – Default to ### days after the Active From date	When document subscriptions are created, the Active To date field defaults to a calculated value based on the Active From date, plus the number of days indicated in this field.	Option – 2 of 3 in Subscribing To set Number	No 365	Y	Y	PortalSettings.Gene ral.Documents.Subs cribeTo.Days	
Subscribing – To – Leave blank – No Expiration	When document subscriptions are created, the Active To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Documents.Subs cribeTo.Blank	
Subscribing – To – Use Publish To date	When document subscriptions are created, the Active To date field defaults to the Publish To date of the document.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Documents.Subs cribeTo.PublishTo	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Original Mockup
1.11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.

9.5. Portal Settings – General – Notes (tab properties only) [Ph1]



General	Description
HelpID	PortalSettings.General.Notes
Title	Portal Settings \rightarrow General \rightarrow Notes
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist
	The Notes tab is used for defining default publication and subscription rules for notes.
	Other tabs are used for defining default publication and subscription rules for folders and other Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:
	 9.2 Portal Settings – General – Matters (tab properties only) 9.3 Portal Settings – General – Entities (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only)
Туре	Standard DE form with nested tabs
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General. For the Notes tab – Default Image – Code
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Notes tab: 1. Default Image – Lookup 2. Default Image – Open

General	Description
	3. Default Summary Includes – Type
	4. Default Summary Includes – Author
	5. New matter publications are automatically assigned to all active portals.
	6. All matter publications are automatically assigned to new portals.
	7. Allow matters assigned to a portal to be automatically published using the Publishing rules.
	8. Publishing – From – Use today's date
	9. Publishing – From – Leave blank - require user to enter a date
	10. Publishing – To – Use ### days after the Publish From date
	11. Publishing – To – Leave blank – No Expiration
	12. Allow note publications to be automatically subscribed to on portals (requires auto-subscription to Notes branch)
	13. Subscribing – From – Use Publish From date
	14. Subscribing – From – Use today's date
	15. Subscribing – From – Leave blank - require user to enter a date
	16. Subscribing – To – Use Publish To date
	17. Subscribing – To – Use ### days after the Active From date
	18. Subscribing – To – Leave blank
	19. Default Image – Code
Related Use Cases	For use cases, see 9.1 Portal Settings – General.
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.

Note tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	Displays the Select Image window, which can be used to select a value for the Default Image field for note publications and subscriptions.	PortalSettings.General.Notes.DefaultImageLookup	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Notes.DefaultImageOpen	

Note tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All existing note publications are automatically assigned to new portals.	When checked, if a new portal is created, all active note publications are automatically assigned to that portal.	Checkbox	N	N	N	PortalSettings.Gene ral.Notes.AutoPubto NewPortal	
All new note publications are automatically assigned to all active portals.	When checked, the default is to assign a new note publication to all active portals. The user will have to remove portals they don't want the item to be available for.	Checkbox	N	N	N	PortalSettings.Gene ral.Notes.AutoPubto ActivePortals	
	When not checked, the default is to leave assignments as they are when the item is published. The user						

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Note tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
	can then manually assign any additional portals.						
Allow note publications to be automatically subscribed to (requires an autosubscription to the Notes branch)	When checked, the user may configure a portal to allow notes assigned to the portal to be automatically subscribed to. This functionality requires that the Note branch of the publications (related) tree have an autosubscription defined.	Checkbox	N	N	N	PortalSettings.Gene ral.Notes.Autosubsc ribePublications	
Allow notes assigned to a portal to be automatically published using the Publishing rules.	When checked, assigning a note to a portal automatically publishes that note to the portal, using the Publishing – From and Publishing – To date rules. The Default Image from the is also used.	Checkbox	N	N	N	PortalSettings.Gene ral.Notes.AutoPubP ortalAsssignments	
Allow notes created for a portal to be automatically published using the Publishing rules	When checked, creating a note for a portal automatically publishes that note to the portal, using the Publish From and Publish To date rules. The Default Image from the is also used.	Checbox	N	N	N	PortalSettings.Gene ral.Notes.AutoPubP ortalItems	
Default Image	This is the image that will be used as the default when the note is published, as well as in auto-subscriptions. Consists of Image Code and Description fields. The first field searches for the images based on code. The second field is a read-only description of the image. The look-up button displays Select Image window.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Notes.DefaultIm age	

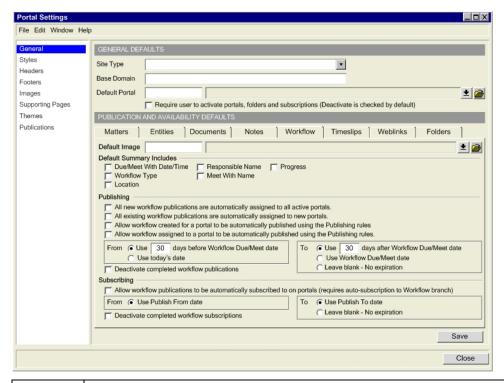
Note tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Summary Includes – Author	When checked, the Author name from the note DE form is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Notes.Includes.A uthor	
Default Summary Includes – Type	When checked, the Type description from the note DE form is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Notes.Includes.T ype	
Publishing – From – Leave blank – require user to enter a date	When note publications are created, the Publish From date field is left blank, requiring the user to enter a date.	Option – 2 of 2 in Publishing From set	No	Υ	Υ	PortalSettings.Gene ral.Notes.PublishFro m.Blank	
Publishing – From – Use today's date	When note publications are created, the Publish From date field defaults to today's date.	Option – 1 of 2 in Publishing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Notes.PublishFro m.Default	
Publishing – To – Default to ### days after the Publish From date	When note publications are created, the Publish To date field defaults to a calculated value based on the Publish From date, plus the number of days indicated in this field.	Option – 1 of 2 in Publishing To set Number	Yes 365	Υ	Y	PortalSettings.Gene ral.Notes.PublishTo. Days	
Publishing – To – Leave blank – No Expiration	When note publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 2 of 2 in Publishing From set	No	Υ	Υ	PortalSettings.Gene ral.Notes.PublishTo. Blank	
Subscribing – From – Leave blank – require user to enter a date	When note subscriptions are created, the Active From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Subscribing From set	No	Υ	Y	PortalSettings.Gene ral.Notes.Subscribe From.Blank	
Subscribing – From – Use Publish From Date	When note subscriptions are created, the Active From date field defaults to the Publish From date of the note.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Y	PortalSettings.Gene ral.Notes.Subscribe From.PublishFrom	

Note tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Subscribing – From – Use today's date	When note subscriptions are created, the Active From date field defaults to today's date.	Option – 2 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Notes.Subscribe From.Default	
Subscribing – To – Default to ### days after the Active From date	When note subscriptions are created, the Active To date field defaults to a calculated value based on the Active From date, plus the number of days indicated in this field.	Option – 2 of 3 in Subscribing To set Number	No 365	Υ	Υ	PortalSettings.Gene ral.Notes.Subscribe To.Days	
Subscribing – To – Leave blank – No Expiration	When note subscriptions are created, the Active To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Notes.Subscribe To.Blank	
Subscribing – To – Use Publish To date	When note subscriptions are created, the Active To date field defaults to the Publish To date of the note.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Notes.Subscribe To.PublishTo	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description				
1.10	03/18/2002	TAF	Original Mockup				
1.11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.				

9.6. Portal Settings – General – Workflow (tab properties only) [Ph1]



General	Description
HelpID	PortalSettings.General.Workflow
Title	Portal Settings \rightarrow General \rightarrow Workflow
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist
	The Workflow tab is used for defining default publication and subscription rules for matters.
	Other tabs are used for defining default publication and subscription rules for folders and other Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:
	 9.2 Portal Settings – General – Matters (tab properties only) 9.3 Portal Settings – General – Entities (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only)
Туре	Standard DE form with nested tabs
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General. For the Workflow tab – Default Image – Code
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Workflow tab: 1. Default Image – Lookup 2. Default Image – Open

General	Description					
	Default Summary Includes – Due/Meet With Date					
	4. Default Summary Includes – Responsible Name					
	5. Default Summary Includes – Progress					
	6. Default Summary Includes – Workflow Type					
	7. Default Summary Includes – Meet With Name					
	8. Default Summary Includes – Location					
	9. New matter publications are automatically assigned to all active portals.					
	10. All matter publications are automatically assigned to new portals.					
	11. Allow matters assigned to a portal to be automatically published using the Publishing rules.					
	12. Publishing – From – Use ### days before Workflow Due/Meet date					
	13. Publishing – From – Use today's date					
14. Publishing – From – Leave blank - require user to enter a date						
	15. Publishing – To – Use ### days after Workflow Due/Meet date					
	16. Publishing – To – Use Workflow Due/Meet date					
	17. Publishing – To – Leave blank – No Expiration					
	18. Deactivate completed workflow publications					
	 Allow workflow publications to be automatically subscribed to on portals (requires auto-subscription to Matters branch) 					
	20. Subscribing – From – Use Publish From date					
	21. Subscribing – To – Use Publish To date					
	22. Subscribing – To – Leave blank					
	23. Deactivate completed workflow subscriptions					
	24. Default Image – Code					
Related Use Cases	For use cases, see 9.1 Portal Settings – General.					
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.					

Workflow tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	l '	PortalSettings.General.Workflow.DefaultImageLooku p	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Workflow.DefaultImageOpen	

Workflow tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All existing workflow item publications are automatically assigned to new portals.	When checked, if a new portal is created, all active workflow item publications are automatically assigned to that portal.	Checkbox	N	N		PortalSettings.Gene ral.Workflow.AutoPu btoNewPortal	

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Workflow tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All new workflow item publications are automatically assigned to all active portals.	When checked, the default is to assign a new workflow item publication to all active portals. The user will have to remove portals they don't want the item to be available for. When not checked, the default is to leave assignments as they are when the item is published. The user can then manually assign any additional	Checkbox	N	N	N	PortalSettings.Gene ral.Workflow.AutoPu btoActivePortals	
Allow workflow item publications to be automatically subscribed to (requires an autosubscription to the Workflow branch)	portals. When checked, the user may configure a portal to allow workflow items assigned to the portal to be automatically subscribed to. This functionality requires that the Workflow branch of the publications (related) tree have an autosubscription defined.	Checkbox	N	N	N	PortalSettings.Gene ral.Workflow.Autosu bscribePublications	
Allow workflow items assigned to a portal to be automatically published using the Publishing rules.	When checked, assigning a workflow item to a portal automatically publishes that workflow item to the portal, using the Publishing – From and Publishing – To date rules. The Default Image from the is also used.	Checkbox	N	N	N	PortalSettings.Gene ral.Workflow.AutoPu bPortalAsssignment s	
Allow workflow items created for a portal to be automatically published using the Publishing rules	When checked, creating a workflow item for a portal automatically publishes that workflow item to the portal, using the Publish From and Publish To date rules. The Default Image from the is also used.	Checbox	N	N	N	PortalSettings.Gene ral.Workflow.AutoPu bPortalItems	

Workflow tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Deactivate completed workflow publications	When checked, workflow item publications are automatically deactivated when the source workflow item is marked as complete.	Checkbox	N	N	N	PortalSettings.Gene ral.Workflow.Publish .DeactiveComplete	
Deactivate completed workflow subscriptions	When checked, workflow item subscriptions are automatically deactivated when the source workflow item is marked as complete.	Checkbox	N	N	N	PortalSettings.Gene ral.Workflow.Subscri be.DeactiveComplet e	
	This field is deactivated and checked if Deactivate completed workflow publications is checked.						
Default Image	This is the image that will be used as the default when the workflow item is published, as well as in auto-subscriptions.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Workflow.Default Image	
	Consists of Image Code and Description fields.						
	The first field searches for the images based on code.						
	The second field is a read-only description of the image.						
	The look-up button displays Select Image window.						
Default Summary Includes – Due/Meet With Date	When checked, the Due/Meet With date/time from the workflow item is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Workflow.Include s.Due/MeetWithDat e	

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Workflow tab- specific Fields (label)	Definition Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Summary Includes – Location	When checked, the Location from the workflow item is included in the summary. This field is only available for appointment, court event, or critical date workflow items on the Publication Properties DE form.	Checkbox	Null	N	N	PortalSettings.Gene ral.Workflow.Include s.Location	
Default Summary Includes – Meet With Name	When checked, the Meet With name from the workflow item is included in the summary. This field is only available for appointment or critical date workflow items on the Publication Properties DE form.	Checkbox	Null	N	N	PortalSettings.Gene ral.Workflow.Include s.MeetWithName	
Default Summary Includes – Progress	When checked, the Progress text from the workflow item is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Workflow.Include s.Progress	
Default Summary Includes – Responsible Name	When checked, the Responsible name from the workflow item is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Workflow.Include s.ResponsibleName	
Default Summary Includes – Workflow Type	When checked, the Type description from the workflow item is included in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Workflow.Include s.WorkflowType	
Publishing – From – Use ### days before Workflow Due/Meet date	When workflow item publications are created, the Publish From date field defaults to a calculated value based on the Due/Meet With date of the workflow item, minus the number of days indicated in this field.	Option – 1 of 2 in Publishing From set Number	Yes 30	Y	Y	PortalSettings.Gene ral.Workflow.Publish From.Blank	

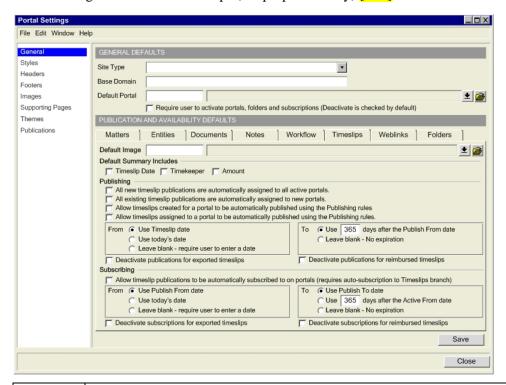
Workflow tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Publishing – From – Use today's date	When workflow item publications are created, the Publish From date field defaults to today's date.	Option – 2 of 2 in Publishing From set	No	Y	Y	PortalSettings.Gene ral.Workflow.Publish From.Default	
Publishing – To – Leave blank – No Expiration	When workflow item publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Publishing From set	No	Y	Υ	PortalSettings.Gene ral.Workflow.Publish To.Blank	
Publishing – To – Use ### days after Workflow Due/Meet date	When workflow item publications are created, the Publish To date field defaults to a calculated value based on the Due/Meet With date of the workflow item, plus the number of days indicated in this field.	Option – 1 of 3 in Publishing To set Number	Yes 30	Y	Y	PortalSettings.Gene ral.Workflow.Publish To.Days	
Publishing – To – Use Workflow Due/Meet date	When workflow item publications are created, the Publish To date field defaults to the Due/Meet With date of the workflow item. If there is no value in the Due/Meet With field, the Publish To field is null, and automatically updated when a Due/Meet With value is entered.	Option – 2 of 3 in Publishing From set	No	Y	Υ	PortalSettings.Gene ral.Workflow.Publish To.Closed	
Subscribing – From – Leave blank – require user to enter a date	When workflow item subscriptions are created, the Active From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Workflow.Subscri beFrom.Blank	
Subscribing – From – Use Publish From Date	When workflow item subscriptions are created, the Active From date field defaults to the Publish From date of the workflow item.	Option – 1 of 3 in Subscribing From set	Yes	Y	Y	PortalSettings.Gene ral.Workflow.Subscri beFrom.PublishFro m	

Workflow tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Subscribing – From – Use today's date	When workflow item subscriptions are created, the Active From date field defaults to today's date.	Option – 2 of 3 in Subscribing From set	No	Y	Y	PortalSettings.Gene ral.Workflow.Subscri beFrom.Default	
Subscribing – To – Default to ### days after the Active From date	When workflow item subscriptions are created, the Active To date field defaults to a calculated value based on the Active From date, plus the number of days indicated in this field.	Option – 2 of 3 in Subscribing To set Number	No 365	Y	Y	PortalSettings.Gene ral.Workflow.Subscri beTo.Days	
Subscribing – To – Leave blank – No Expiration	When workflow item subscriptions are created, the Active To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Workflow.Subscri beTo.Blank	
Subscribing – To – Use Publish To date	When workflow item subscriptions are created, the Active To date field defaults to the Publish To date of the workflow item.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Workflow.Subscri beTo.PublishTo	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Original Mockup
1.11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.

9.7. Portal Settings – General – Timeslips (tab properties only) [Ph1]



General	Description
HelpID	PortalSettings.General.Timeslips
Title	Portal Settings \rightarrow General \rightarrow Timeslips
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist
	The Timeslips tab is used for defining default publication and subscription rules for matters.
	Other tabs are used for defining default publication and subscription rules for folders and other Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:
	 9.2 Portal Settings – General – Matters (tab properties only) 9.3 Portal Settings – General – Entities (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only)
Туре	Standard DE form with nested tabs
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General. For the Timeslips tab – Default Image – Code
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Timeslips tab: Default Image – Lookup Default Image – Open

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General	Description
	Default Summary Includes – Timeslip Date
	4. Default Summary Includes – Timekeeper
	5. Default Summary Includes – Amount
	6. New timeslip publications are automatically assigned to all active portals.
	7. All timeslip publications are automatically assigned to new portals.
	8. Allow timeslips assigned to a portal to be automatically published using the Publishing rules.
	9. Publishing – From – Use Timeslip date
	10. Publishing – From – Use today's date
	11. Publishing – From – Leave blank - require user to enter a date
	12. Publishing – To – Use ### days after the Publish From date
	13. Publishing – To – Leave blank – No Expiration
	14. Allow timeslip publications to be automatically subscribed to on portals (requires auto-subscription to Timeslips branch)
	15. Subscribing – From – Use Publish From date
	16. Subscribing – From – Use today's date
	17. Subscribing – From – Leave blank - require user to enter a date
	18. Subscribing – To – Use Publish To date
	19. Subscribing – To – Use ### days after the Active From date
	20. Subscribing – To – Leave blank
	21. Default Image – Code
Related Use Cases	For use cases, see 9.1 Portal Settings – General.
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.

Timeslip tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	Displays the Select Image window, which can be used to select a value for the Default Image field for timeslip publications and subscriptions.	PortalSettings.General.Timeslips.DefaultImageLooku p	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Timeslips.DefaultImageOpen	

Timeslip tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All existing timeslip publications are automatically assigned to new portals.	When checked, if a new portal is created, all active timeslip publications are automatically assigned to that portal.	Checkbox	N	N		PortalSettings.Gene ral.Timeslips.AutoP ubtoNewPortal	

Timeslip tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
All new timeslip publications are automatically assigned to all active portals.	When checked, the default is to assign a new timeslip publication to all active portals. The user will have to remove portals they don't want the item to be available for. When not checked, the default is to leave assignments as they are when the item is published. The user can then manually assign any additional portals.	Checkbox	N	N	N	PortalSettings.Gene ral.Timeslips.AutoP ubtoActivePortals	
Allow timeslip publications to be automatically subscribed to (requires an autosubscription to the Timeslips branch)	When checked, the user may configure a portal to allow timeslips assigned to the portal to be automatically subscribed to. This functionality requires that the Timeslip branch of the publications (related) tree have an autosubscription defined.	Checkbox	N	N	N	PortalSettings.Gene ral.Timeslips.Autosu bscribePublications	
Allow timeslips assigned to a portal to be automatically published using the Publishing rules.	When checked, assigning a timeslip to a portal automatically publishes that timeslip to the portal, using the Publishing – From and Publishing – To date rules. The Default Image from the is also used.	Checkbox	N	N	N	PortalSettings.Gene ral.Timeslips.AutoP ubPortalAsssignme nts	
Allow timeslips created for a portal to be automatically published using the Publishing rules	When checked, creating a timeslip for a portal automatically publishes that timeslip to the portal, using the Publish From and Publish To date rules. The Default Image from the is also used.	Checbox	N	N	N	PortalSettings.Gene ral.Timeslips.AutoP ubPortalItems	

Timeslip tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Image	This is the image that will be used as the default when the timeslip is published, as well as in autosubscriptions.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Timeslip.DefaultI mage	
	Consists of Image Code and Description fields.						
	The first field searches for the images based on code.						
	The second field is a read-only description of the image.						
	The look-up button displays Select Image window.						
Default Summary Includes – Amount	When checked, the Amount from the timeslip appears in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Timeslips.Include s.Amount	
Default Summary Includes – Timekeeper	When checked, the Timekeeper code and name from the timeslip appears in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Timeslips.Include s.Timekeeper	
Default Summary Includes – Timeslip Date	When checked, the Date from the timeslip appears in the summary.	Checkbox	Null	N	N	PortalSettings.Gene ral.Timeslips.Include s.TimeslipDate	
Publishing – From – Leave blank – require user to enter a date	When timeslip publications are created, the Publish From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Publishing From set	No	Y	Y	PortalSettings.Gene ral.Timeslips.Publis hFrom.Blank	
Publishing – From – Use Timeslip date	When timeslip publications are created, the Publish From date field defaults to the timeslip Date from the published timeslip DE form.	Option – 1 of 3 in Publishing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Timeslips.Publis hFrom.Opened	
	If there is no value in the Date field, the Publish From field is null, and automatically updated when a Date value is entered.						

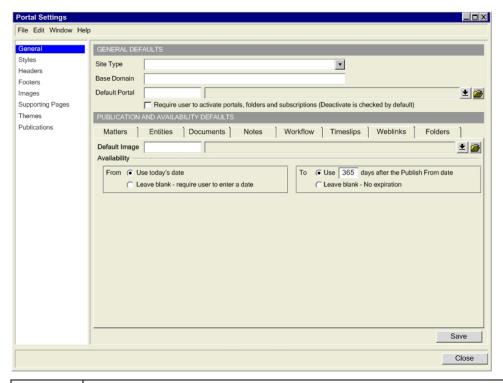
Timeslip tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Publishing – From – Use today's date	When timeslip publications are created, the Publish From date field defaults to today's date.	Option – 2 of 3 in Publishing From set	No	Υ	Υ	PortalSettings.Gene ral.Timeslips.Publis hFrom.Default	
Publishing – To – Default to ### days after the Publish From date	When timeslip publications are created, the Publish To date field defaults to a calculated value based on the Publish From date, plus the number of days indicated in this field.	Option – 1 of 2 in Publishing To set Number	Yes 365	Υ	Υ	PortalSettings.Gene ral.Timeslips.Publis hTo.Days	
Publishing – To – Leave blank – No Expiration	When timeslip publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 2 of 2 in Publishing From set	No	Υ	Υ	PortalSettings.Gene ral.Timeslips.Publis hTo.Blank	
Subscribing – From – Leave blank – require user to enter a date	When timeslip subscriptions are created, the Active From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Subscribing From set	No	Υ	Y	PortalSettings.Gene ral.Timeslips.Subscr ibeFrom.Blank	
Subscribing – From – Use Publish From Date	When timeslip subscriptions are created, the Active From date field defaults to the Publish From date of the timeslip.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Y	PortalSettings.Gene ral.Timeslips.Subscr ibeFrom.PublishFro m	
Subscribing – From – Use today's date	When timeslip subscriptions are created, the Active From date field defaults to today's date.	Option – 2 of 3 in Subscribing From set	No	Υ	Y	PortalSettings.Gene ral.Timeslips.Subscr ibeFrom.Default	
Subscribing – To – Default to ### days after the Active From date	When timeslip subscriptions are created, the Active To date field defaults to a calculated value based on the Active From date, plus the number of days indicated in this field.	Option – 2 of 3 in Subscribing To set Number	No 365	Υ	Υ	PortalSettings.Gene ral.Timeslips.Subscr ibeTo.Days	

Timeslip tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Subscribing – To – Leave blank – No Expiration	When timeslip subscriptions are created, the Active To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Subscribing From set	No	Υ	Υ	PortalSettings.Gene ral.Timeslips.Subscr ibeTo.Blank	
Subscribing – To – Use Publish To date	When timeslip subscriptions are created, the Active To date field defaults to the Publish To date of the timeslip.	Option – 1 of 3 in Subscribing From set	Yes	Υ	Υ	PortalSettings.Gene ral.Timeslips.Subscr ibeTo.PublishTo	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Original Mockup

9.8. Portal Settings – General – Weblinks (tab properties only) [Ph1]



General	Description
HelpID	PortalSettings.General
Title	Portal Settings → General → Weblinks
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist
	The Weblinks tab is used for defining default availability rules for weblinks.
	Other tabs are used for defining default publication and subscription rules for Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:
	 9.2 Portal Settings – General – Matters (tab properties only) 9.3 Portal Settings – General – Entities (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.9 Portal Settings – General – Folders (tab properties only)
Туре	Standard DE form with nested tabs
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General. For the Weblinks tab – Default Image – Code
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Weblinks tab: 1. Default Image – Lookup 2. Default Image – Open

General	Description
	 Availability – From – Use today's date Availability – From – Leave blank - require user to enter a date Availability – To – Use ### days after the Publish From date Availability – To – Leave blank – No Expiration Default Image – Code
Related Use Cases	For use cases, see 9.1 Portal Settings – General.
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.

Weblink tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	l '	PortalSettings.General.Weblinks.DefaultImageLooku p	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Weblinks.DefaultImageOpen	

Weblink tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Availability – From – Leave blank – require user to enter a date	When weblink publications are created, the Publish From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Publishing From set	No	Υ	Y	PortalSettings.Gene ral.Weblinks.Publish From.Blank	
Availability – From – Use today's date	When weblink publications are created, the Publish From date field defaults to today's date.	Option – 2 of 3 in Publishing From set	No	Υ	Y	PortalSettings.Gene ral.Weblinks.Publish From.Default	
Availability – To – Default to ### days after the Publish From date	When weblink publications are created, the Publish To date field defaults to a calculated value based on the Publish From date, plus the number of days indicated in this field.	Option – 2 of 3 in Publishing To set Number	No 365	Υ	Y	PortalSettings.Gene ral.Weblinks.Publish To.Days	
Availability – To – Leave blank – No Expiration	When weblink publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Publishing From set	No	Υ	Υ	PortalSettings.Gene ral.Weblinks.Publish To.Blank	

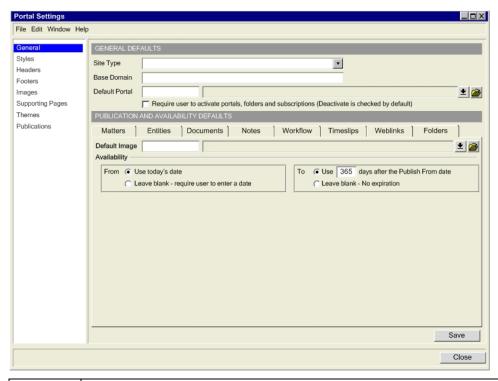
Printed: 06/12/2018

Weblink tab- specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Image	This is the image that will be used as the default when the weblink is created.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Weblinks.Default Image	
	Consists of Image Code and Description fields.						
	The first field searches for the images based on code.						
	The second field is a read-only description of the image.						
	The look-up button displays Select Image window.						

Special Rules and Clarifications
1. None.

	Rev No.	Rev Date	Rev By	Revision Description
1.1	10	03/18/2002	TAF	Original Mockup
1.1	11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.

9.9. Portal Settings – General – Folders (tab properties only) [Ph1]



General	Description
HelpID	PortalSettings.General
Title	Portal Settings \rightarrow General \rightarrow Folders
Usage	The primary form is used to define general portal settings, including several default values for use on all portals. See the following mockups:
	9.1 Portal Settings – General 9.10 Portal Settings – General – Unsaved Changes Exist
	The Folders tab is used for defining default availability rules for folders.
	Other tabs are used for defining default publication and subscription rules for Practice Manager objects. For information on maintaining these Publication and Availability Defaults , refer to the following mockups:
	 9.2 Portal Settings – General – Matters (tab properties only) 9.3 Portal Settings – General – Entities (tab properties only) 9.4 Portal Settings – General – Documents (tab properties only) 9.5 Portal Settings – General – Notes (tab properties only) 9.6 Portal Settings – General – Workflow (tab properties only) 9.7 Portal Settings – General – Timeslips (tab properties only) 9.8 Portal Settings – General – Weblinks (tab properties only)
Туре	Standard DE form with nested tabs
Open Focus	For open focus rules on the General page, see 9.1 Portal Settings – General. For the Folders tab – Default Image – Code
Tab Order	For tab order on the General page, see 9.1 Portal Settings – General. For the Folders tab: Default Image – Lookup Default Image – Open

General	Description		
 Availability – From – Use today's date Availability – From – Leave blank - require user to enter a date Availability – To – Use ### days after the Publish From date Availability – To – Leave blank – No Expiration Default Image – Code 			
Related Use Cases	For use cases, see 9.1 Portal Settings – General.		
Phasing Considerations	For phasing considerations, see 9.1 Portal Settings – General.		

Folder tab- specific Buttons	Function / Action	HelpID	Hot Key
Default Image – Lookup	Displays the Select Image window, which can be used to select a value for the Default Image field for folder publications and subscriptions.	PortalSettings.General.Folders.DefaultImageLookup	
Default Image – Open	Opens the Image Properties window for the selected default image.	PortalSettings.General.Folders.DefaultImageOpen	

Folder tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Availability – From – Leave blank – require user to enter a date	When folder publications are created, the Publish From date field is left blank, requiring the user to enter a date.	Option – 3 of 3 in Publishing From set	No	Y	Y	PortalSettings.Gene ral.Folders.PublishF rom.Blank	
Availability – From – Use today's date	When folder publications are created, the Publish From date field defaults to today's date.	Option – 2 of 3 in Publishing From set	No	Υ	Y	PortalSettings.Gene ral.Folders.PublishF rom.Default	
Availability – To – Default to ### days after the Publish From date	When folder publications are created, the Publish To date field defaults to a calculated value based on the Publish From date, plus the number of days indicated in this field.	Option – 2 of 3 in Publishing To set Number	No 365	Υ	Υ	PortalSettings.Gene ral.Folders.PublishT o.Days	
Availability – To – Leave blank – No Expiration	When folder publications are created, the Publish To date field is left blank, indicating there is no expiration date.	Option – 3 of 3 in Publishing From set	No	Y	Y	PortalSettings.Gene ral.Folders.PublishT o.Blank	

Printed: 06/12/2018

Folder tab-specific Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Default Image	This is the image that will be used as the default when the folder is created.	Code – Search Text – Read-Only	Null	N	N	PortalSettings.Gene ral.Folders.DefaultI mage	
	Consists of Image Code and Description fields.						
	The first field searches for the images based on code.						
	The second field is a read-only description of the image.						
	The look-up button displays Select Image window.						

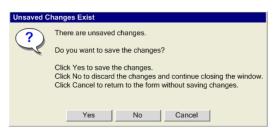
Special Rules and Clarifications				
9. None.				

Rev No.	Rev Date	Rev By	Revision Description
1.10	03/18/2002	TAF	Original Mockup
1.11	03/26/2002	TAF	Added Weblinks Tab with default values for publishing Weblinks.

Last Updated: 07/15/2003

9.10. Portal Settings – General – Unsaved Changes Exist [Ph1]

Printed: 06/12/2018



General	Description			
HelpID	PortalSettings.General.Dialog.UnsavedChanges			
Title	Unsaved Changes Exist			
Usage	Alerts the user that unsaved changes exist on the General page of Portal Settings.			
Туре	Modal Dialog Box			
Open Focus	Yes			
Tab Order 1. No 2. Cancel 3. Yes				
Related Use Cases	1 · · · · · · · · · · · · · · · · · · ·			
Phasing Considerations	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No Changes.			

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Portal Settings – General page without saving or discarding the changes.	PortalSettings.General.Dialog.UnsavedChanges.Can cel	
No	Continues closing the Portal Settings window, and discards any changes that have been made to the General page since the last time the settings were saved.	PortalSettings.General.Dialog.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Portal Settings window.	PortalSettings.General.Dialog.UnsavedChanges.Yes	

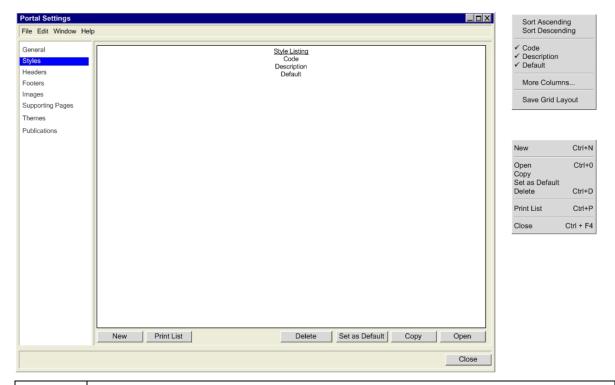
Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

9.11. Portal Settings – Styles Listing [Ph2]

Printed: 06/12/2018



General	Description
HelpID	PortalSettings.StylesListing
Title	Portal Settings → Styles
Usage	Displays a list of Styles that are available for use on Portals.
Туре	Listing
Open Focus	Grid
Tab Order	 New Print List Delete Set as Default Copy Open Close Grid
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 10.2.6 Manage Styles – Deleting Existing Style
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Close	See 9.1 Portal Settings – General for details on the fur	nctionality of the Close button.	
Сору	Opens a Style Properties DE form with the Code and Description field blank; however, all other fields are populated with the values from the selected style.	PortalSettings.StylesListing.Copy	
Delete	Deletes the selected style, but first displays a dialog box which gives the user the option of proceeding with deleting the style or keeping it.	PortalSettings.StylesListing.Delete	
New	Opens a blank Style Properties DE form so the user can create a new style.	PortalSettings.StylesListing.New	
Open	Opens the Style Properties DE form of the selected style.	PortalSettings.StylesListing.Open	
Print List	Prints the list of styles to a file or printer.	PortalSettings.StylesListing.PrintList	
Set as Default	Sets the selected style as the default style for portals. There can be only one default style selected. When the user clicks Set as Default , check to see if an existing default exists for styles. If one does exist, display a dialog box that gives the user the option of making the selected style the default (Yes), or keeping the current default for styles (No).	PortalSettings.StylesListing.SetasDefault	

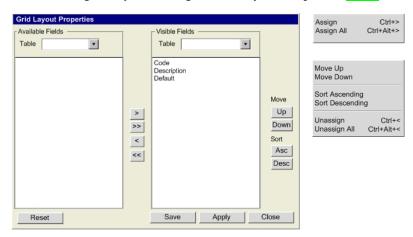
Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the style.	PortalSettings.Style sListing.Code	
Default	This field, when populated, indicates the style is the default for portals.	PortalSettings.Style sListing.Default	
Description	This is the description of the style.	PortalSettings.Style sListing.Description	

Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- 2. The grid includes a shortcut menu for the records listing, allowing the user to create a new style, open, copy, set as default or delete an existing style that has been selected; print the list of styles, or close the window.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.
1.02	03/03/2002	TAF	Change HELPID from ".Styles" to ".StylesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.12. Portal Settings – Styles Listing – Grid Layout Properties [Ph2]



General	Description
HelpID	PortalSettings.StylesListing.GridLayoutProperties
Title	Grid Layout Properties
Usage	Defines the grid layout properties for the Styles listing, including visible fields, column order, and sort order.
Туре	Modal Dialog
Open Focus	Available Fields – Table
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table
Related Use Cases	10.2.1 Manage Styles – List Styles
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

	Buttons	Function / Action	HelpID	Hot Key
,		Closes the Grid Layout Properties window and applies the settings.	PortalSettings.StylesListing.GridLayoutProperties.Apply	

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Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.StylesListing.GridLayoutProperties.As sign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.StylesListing.GridLayoutProperties.As signAll	
Close	Closes the Grid Layout Properties window. The window remains open after clicking Save . If the user then wants to apply the saved changes, they can click Apply .	PortalSettings.StylesListing.GridLayoutProperties.Clo se	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.StylesListing.GridLayoutProperties.Mo veDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.StylesListing.GridLayoutProperties.MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.StylesListing.GridLayoutProperties.Re set	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.StylesListing.GridLayoutProperties.Sa ve	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.StylesListing.GridLayoutProperties.Sor tAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.StylesListing.GridLayoutProperties.Sor tDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.StylesListing.GridLayoutProperties.Un ssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.StylesListing.GridLayoutProperties.Un assignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Style sListing.GridLayout Properties.Available Fields	
Available Fields – Table	This is the table from which the list of Available Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Style sListing.GridLayout Properties.Available Fields.Table	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing						

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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Visible Fields	These are the fields that are visible on the grid. The fields appear from left to right in the same order they are listed from top to bottom. The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Style sListing.GridLayout Properties.VisibleFi elds	
Visible Fields – Table	This is the table from which the list of Visible Fields is listed. All Tables is one of the drop-down list options, which means all tables applicable to the listing	Drop-down List	All Tables	n/a	n/a	PortalSettings.Style sListing.GridLayout Properties.VisibleFi elds.Table	

Special Rules and Clarifications

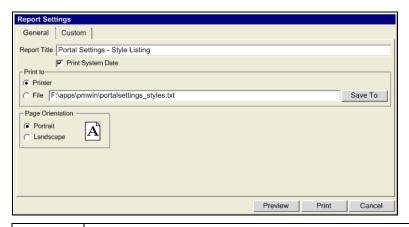
1. Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Styles" to ".StylesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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Last Updated: 07/15/2003

9.13. Portal Settings – Styles Listing – Report Settings – General [Ph3]



General	Description
HelpID	PortalSettings.StylesListing.ReportSettings.General
Title	Report Settings → General
Usage	Sets general parameters for printing the Styles listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Report Title
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close
Related Use Cases	10.2.1 Manage Styles – List Styles
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.StylesListing.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.StylesListing.ReportSettings.Preview	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.StylesListing.ReportSettings.Print	

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Buttons	Function / Action	HelpID	Hot Key
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Υ	Option 1 of 2	n/a	PortalSettings.Style sListing.ReportSetti ngs.GeneralPageOri entation.Landscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Υ	Option 1 of 2	n/a	PortalSettings.Style sListing.ReportSetti ngs.GeneralPageOri entation.Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Style sListing.ReportSetti ngs.GeneralPrintSy stemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Style sListing.ReportSetti ngs.GeneralPrintto. File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_styles.txt	Υ	n/a	PortalSettings.Style sListing.ReportSetti ngs.GeneralPrintto. File(path/filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	PortalSettings.Style sListing.ReportSetti ngs.GeneralPrintto. Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Style Listing"	N	n/a	PortalSettings.Style sListing.ReportSetti ngs.GeneralReportT itle	

Special Rules and Clarifications

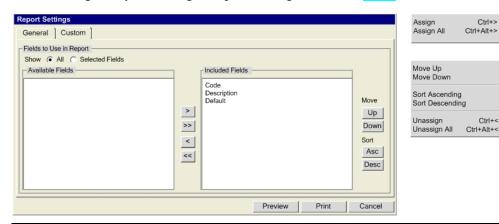
- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- 2. When the report has been saved to the file, a dialog box appears advising the user of this.
- 3. After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Styles" to ".StylesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Ctrl+>

Ctrl+<

9.14. Portal Settings – Styles Listing – Report Settings – Custom [Ph3]



General	Description
HelpID	PortalSettings.StylesListing.ReportSettings.Custom
Title	Report Settings → Custom
Usage	Sets custom parameters for printing the Styles listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Show – All
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All
Related Use Cases	10.2.1 Manage Styles – List Styles
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Assigns the selected Available Fields , including them in the report.	PortalSettings.StylesListing.ReportSettings.Custom.A ssign	
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.StylesListing.ReportSettings.Custom.A ssignAll	
Cancel	The functionality of this button defined with General Report Settings.	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.StylesListing.ReportSettings.Custom. MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.StylesListing.ReportSettings.Custom. MoveUp	
Preview	The functionality of this button defined with General Report Settings.	n/a	
Print	The functionality of this button defined with General Report Settings.	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.StylesListing.ReportSettings.Custom.SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.StylesListing.ReportSettings.Custom.S ortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.StylesListing.ReportSettings.Custom.U nassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.StylesListing.ReportSettings.Custom.U nassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Style sListing.ReportSetti ngs.Custom.Availabl eFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Style sListing.ReportSetti ngs.Custom.Include dFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Y	Option 1 of 2	n/a	PortalSettings.Style sListing.ReportSetti ngs.Custom.Show.A	

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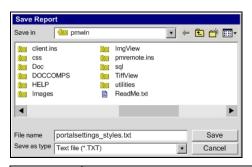
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	,	Option – In a set with All	N	Option 1 of 2		PortalSettings.Style sListing.ReportSetti ngs.Custom.Show.S elected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Styles" to ".StylesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.15. Portal Settings – Styles Listing – Report Settings – General – Save Report (save) [Ph3]



General	Description			
HelpID	PortalSettings.StylesListing.ReportSettings.General.SaveTo.Lookup			
Title	Save Report			
Usage	Defines the file name and location where the report will be stored for printed to file.			
Туре	Modal Dialog			
Open Focus	File name			
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name 			
Related Use Cases	10.2.1 Manage Styles – List Styles			
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.			

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
	Allows the user to change the display properties of the folder/file grid.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Lookup.Views	

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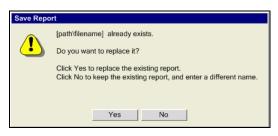
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_style s.txt	Υ	n/a	PortalSettings.Style sListing.ReportSetti ngs.General.SaveT o.Lookup.FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Style sListing.ReportSetti ngs.General.SaveT o.Lookup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Style sListing.ReportSetti ngs.General.SaveT o.Lookup.SaveAsTy pe	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Style sListing.ReportSetti ngs.General.SaveT o.Lookup.SaveIn	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Styles" to ".StylesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.16. Portal Settings – Styles Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.StylesListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	2. Yes 3. No
Related Use Cases	10.2.1 Manage Styles – List Styles
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.StylesListing.ReportSettings.General. SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".Styles" to ".StylesListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

Portal Settings – Styles Listing – Report Settings – General – Save Report Success [Ph3] 9.17.



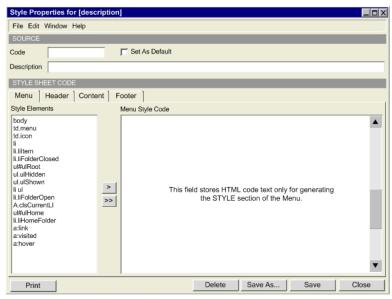
General	Description
HelpID	PortalSettings.StylesListing.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.2.1 Manage Styles – List Styles
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.StylesListing.ReportSettings.General. SaveReportSuccess.OK	

Spe	cial Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Styles" to ".StylesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.18. Portal Settings – Style Properties – Menu [Ph2]





General	Description
HelpID	Portal.StyleProperties.Menu
Title	Style Properties for [description] \rightarrow Menuwhere [description] is the style description.
Usage	Defines style properties, as well as properties for the menu section style
Туре	Standard Multi-tab DE form
Open Focus	Code
Tab Order	 Set as Default Description Style Elements Copy (>) Copy All (>>) Menu Style Code Print Delete Save As Save Close Code
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties 10.2.6 Manage Styles – Deleting Existing Style

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General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key	
Close	Closes the window. Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).	Portal.StyleProperties.Close		
Copy (>)	Copies the selected Style Elements into the Menu Style Code field.	Portal.StyleProperties.Menu.CopyElements		
Copy All (>>)	Copies all Style Elements into the Menu Style Code field.	Portal.StyleProperties.Portal.CopyAllElements		
Delete	Deletes the style.	Portal.StyleProperties.Delete		
Print	Prints the properties of the style, including the style sheet code for Portal, Menu, Header, Content, and Footer	Portal.StyleProperties.Print		
Save	Saves the style record. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Close.	Portal.StyleProperties.Save		
Save As	Displays a dialog box, allowing the user to save the existing style, including any unsaved changes, as a new style.	Portal.StyleProperties.SaveAs		
	This is available only for existing styles. The previous style record is closed without saving any changes that were made after the record was last saved.			
	The Style Properties DE form now appears populated for the new style.			

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the style.	Code		Υ	Υ	Portal.StyleProperti es.Code	
Description	This is the description of the style.	Text		Υ	Υ	Portal.StyleProperti es.Description	
Menu Style Code	This is the code for the menu style sheet.	Text – It would be best of the default font could be 10pt courier, and allow or both horizontal and vertical scrolling, with no wrapping.		N	N	Portal.StyleProperti es.Menu.StyleCode	

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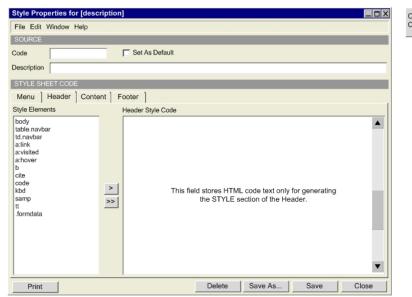
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Set as Default	This indicates this is the default portal style.	Checkbox	Unchecked	N	N	Portal.StyleProperti es.SetAsDefault	
	If the user checks Set as Default and then saves the record, check to see if an existing default exists for styles. If one does exist, display a dialog box that gives the user the option of making the active style the default (Yes), or keeping the current default for styles (No).						
Style Elements	This is a list of style elements required for the menu style sheet.	Assign-type Selection List		n/a	n/a	Portal.StyleProperti es.Menu.StyleElem ents	
	Each element contains a support set of style class property elements that are copied into the Menu Style Code field at the cursor's location.						

Special Rules and Clarifications

Style Elements should support multi-select.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Style Properties – Header [Ph2] 9.19.





General	Description
HelpID	Portal.StyleProperties.Header
Title	Style Properties for [description] \rightarrow Headerwhere [description] is the style description.
Usage	Defines style properties, as well as properties for the header section style
Туре	Standard Multi-tab DE form
Open Focus	Code
Tab Order	 Set as Default Description Style Elements Copy (>) Copy All (>>) Header Style Code Print Delete Save As Save Close Code
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties 10.2.6 Manage Styles – Deleting Existing Style

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General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

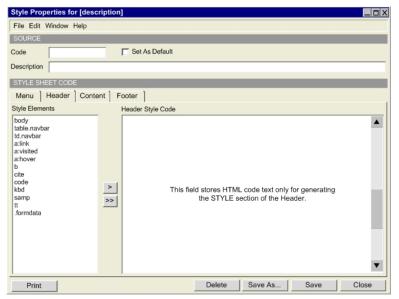
Buttons	Function / Action	HelpID	Hot Key			
Close	ee 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Copy (>)	Copies the selected Style Elements into the Header Style Code field.	Portal.StyleProperties.Header.CopyElements				
Copy All (>>)	y All (>>) Copies all Style Elements into the Header Style Code field. Portal.StyleProperties.Portal.CopyAllElements					
Delete	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Print	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Save	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Save As	See 9.18 Portal Settings – Style Properties – Menu for	r the functionality of this button.				

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	See 9.18 Portal Settings	s – Style Properties – I	Menu for the functiona	lity of the	e definition	on of this field	
Description	See 9.18 Portal Settings	s – Style Properties – N	Menu for the functiona	lity of the	e definition	on of this field	
Header Style Code	This is the code for the header style sheet.	Text – It would be best of the default font could be 10pt courier, and allow or both horizontal and vertical scrolling, with no wrapping.		N	N	Portal.StyleProperti es.Header.StyleCod e	
Set as Default	See 9.18 Portal Settings	s – Style Properties – I	Menu for the functiona	lity of the	e definition	on of this field	
Style Elements	This is a list of style elements required for the header style sheet. Each element contains a support set of style class property elements that are copied into the Header Style Code field at the cursor's location.	Assign-type Selection List		n/a	n/a	Portal.StyleProperti es.Header.StyleEle ments	

Special Rules and Clarifications Style Elements should support multi-select.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.20. Portal Settings – Style Properties – Content [Ph2]





General	Description					
HelpID	Portal.StyleProperties.Content					
Title	Style Properties for [description] \rightarrow Contentwhere [description] is the style description.					
Usage	Defines style properties, as well as properties for the subscription section style					
Туре	Standard Multi-tab DE form					
Open Focus	Code					
Tab Order	 Set as Default Description Style Elements Copy (>) Copy All (>>) Content Style Code Print Delete Save As Save Close Code 					
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties 10.2.6 Manage Styles – Deleting Existing Style					

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General	Description
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key			
Close	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Copy (>)	Copies the selected Style Elements into the Footer Style Code field.	Portal.StyleProperties.Content.CopyElements				
Copy All (>>) Copies all Style Elements into the Footer Style Portal.StyleProperties.Portal.Co		Portal.StyleProperties.Portal.CopyAllElements				
Delete	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Print	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Save	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Save As	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	See 9.18 Portal Settings – Style Properties – Menu for the functionality of the definition of this field						
Description	See 9.18 Portal Settings – Style Properties – Menu for the functionality of the definition of this field						
Content Style Code	This is the code for the subscription style sheet.	Text – It would be best of the default font could be 10pt courier, and allow or both horizontal and vertical scrolling, with no wrapping.		N	N	Portal.StyleProperti es.Content.StyleCo de	
Set as Default	See 9.18 Portal Settings – Style Properties – Menu for the functionality of the definition of this field						
Style Elements	This is a list of style elements required for the subscription style sheet.	Assign-type Selection List		n/a	n/a	Portal.StyleProperti es.Content.StyleEle ments	
	Each element contains a support set of style class property elements that are copied into the Content Style Code field at the cursor's location.						

	Special Rules and Clarifications		
1.	Style Elements should support multi-select.		

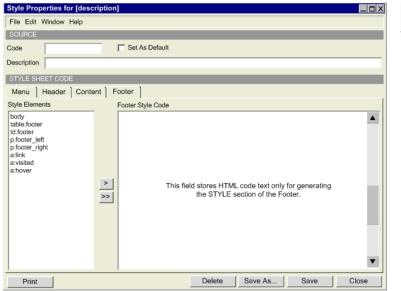
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Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.21. Portal Settings – Style Properties – Footer [Ph2]





General	Description
HelpID	Portal. Style Properties. Footer
Title	Style Properties for [description] \rightarrow Footerwhere [description] is the style description.
Usage	Defines style properties, as well as properties for the footer section style
Туре	Standard Multi-tab DE form
Open Focus	Code
Tab Order	 Set as Default Description Style Elements Copy (>) Copy All (>>) Footer Style Code Print Delete Save As Save Close Code
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties 10.2.6 Manage Styles – Deleting Existing Style

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General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key			
Close	See 9.18 Portal Settings – Style Properties – Menu for	ee 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.				
Copy (>)	Copies the selected Style Elements into the Footer Style Code field.	Portal.StyleProperties.Footer.CopyElements				
Copy All (>>)	Copies all Style Elements into the Footer Style Code field.	tyle Portal.StyleProperties.Portal.CopyAllElements				
Delete	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Print	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Save	See 9.18 Portal Settings – Style Properties – Menu for the functionality of this button.					
Save As	See 9.18 Portal Settings – Style Properties – Menu for	the functionality of this button.				

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	See 9.18 Portal Settings	See 9.18 Portal Settings – Style Properties – Menu for the functionality of the definition of this field					
Description	See 9.18 Portal Settings	s – Style Properties – ľ	Menu for the functional	lity of the	e definition	on of this field	
Footer Style Code	This is the code for the footer style sheet.	Text – It would be best of the default font could be 10pt courier, and allow or both horizontal and vertical scrolling, with no wrapping.		N	N	Portal.StyleProperti es.Footer.StyleCod e	
Set as Default	See 9.18 Portal Settings	s – Style Properties – I	Menu for the functional	lity of the	e definition	on of this field	
Style Elements	This is a list of style elements required for the footer style sheet. Each element contains a support set of style class property elements that are copied into the Footer Style Code field at the cursor's location.	Assign-type Selection List		n/a	n/a	Portal.StyleProperti es.Footer.StyleElem ents	

Special Rules and Clarifications Style Elements should support multi-select.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Style Properties – Save As [Ph2] 9.22.



General	Description
HelpID	Portal.StyleProperties.SaveAs.Dialog
Title	Save As
Usage	Allows the user to save the existing style, including any unsaved changes, as a new style. This option is available only for existing styles. The previous style record is closed without saving any changes that were made after the record was last saved. The Style Properties DE form now appears populated for the new style.
Туре	Modal DE form
Open Focus	Code
Tab Order	 Description Set as Default OK Cancel Code
Related Use Cases	10.2 Manage Styles Use Cases 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
OK	Save the existing style, including any unsaved changes, as a new style using the Code and Description entered.	Portal.StyleProperties.Portal.SaveAs.Dialog.OK	
	This is available only for existing styles.		
	The previous style record is closed without saving any changes that were made after the record was last saved.		
	The Style Properties DE form now appears populated for the new style.		
Cancel	Cancels the save as operation, and returns the user to the Style Properties DE form in the state it was left in when Save As was selected.	Portal.StyleProperties.Portal.SaveAs.Dialog.Cancel	
	Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes) and advancing to the Style Properties DE form for the new style, discarding the changes (No) and returning to the Style Properties DE form of the original existing style, or returning to the Save As DE form (Cancel).		

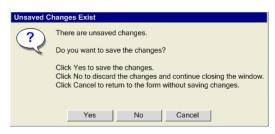
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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the style.	Code		Υ	Υ	Portal.StyleProperti es.SaveAs.Dialog.C ode	
Description	This is the description of the style.	Text		Υ	Υ	Portal.StyleProperti es.SaveAs.Dialog.D escription	
Set as Default	This indicates this is the default portal style. If the user checks Set as Default and then saves the record, check to see if an existing default exists for styles. If one does exist, display a dialog box that gives the user the option of making the new active style the default (Yes), or keeping the current default for styles (No).	Checkbox	Unchecked	N	N	Portal.StyleProperti es.SaveAs.Dialog.S etAsDefault	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.23. Portal Settings – Style Properties – Unsaved Changes Exist [Ph2]



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General	Description
HelpID	Portal.StyleProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on the Style Properties window.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Cancel 3. Yes
Related Use Cases	10.2 Manage Styles Use Cases 10.2.2 Manage Styles – Create New Style 10.2.4 Manage Styles – Modify Existing Style
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Style Properties window without saving or discarding the changes.	Portal.StyleProperties.UnsavedChanges.Cancel	
No	Continues closing the Style Properties window, and discards any changes that have been made to the Style Properties since the last time the settings were saved.	Portal.StyleProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Style Properties window.	Portal.StyleProperties.UnsavedChanges.Yes	

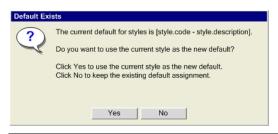
Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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Last Updated: 07/15/2003

9.24. Portal Settings – Style Properties – Default Exists [Ph2]



General	Description
HelpID	Portal.StyleProperties.DefaultExists
Title	Default Exists
Usage	Advises the user that a default already exists for styles, and gives them the option of using the active style as the new default or keeping the current default assignment.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates making the active/selected style the default. If the dialog box was opened from the Style	Portal.StyleProperties.DefaultExists.No	
	Properties DE form, the Set as Default field in that record is cleared before the record is saved.		
Yes	Makes the active/selected style the default, clearing the Set as Default field in the current default style, and populating the Set as Default field in the active/selected style.	Portal.StyleProperties.DefaultExists.Yes.	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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9.25. Portal Settings – Style Properties – Delete Confirmation [Ph2]



General	Description
HelpID	Portal.StyleProperties.DeleteConfirmation
Title	Delete Confirmation
Usage	Allows the user to either continue deleting the style (Yes), or terminate deleting the style (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.4 Manage Styles – Modify Existing Style 10.2.6 Manage Styles – Deleting Existing Style
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

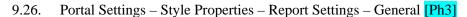
Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the style, and returns the user to the window from which the dialog box was opened.	Portal.StyleProperties.DeleteConfirmation.No	
Yes	Continues deleting the style, and returns the user to the Styles listing.	Portal.StyleProperties.DeleteConfirmation.Yes.	

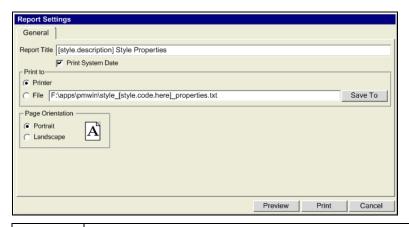
Special Rules and Clarifica	tions
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018

Last Updated: 07/15/2003





General	Description
HelpID	Portal.StyleProperties.ReportSettings.General
Title	Report Settings \rightarrow General
Usage	Sets general parameters for printing the Style Properties to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Report Title
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close
Related Use Cases	10.2 Manage Styles Use Cases 10.2.2 Manage Styles – Create New Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	Portal.StyleProperties.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	Portal.StyleProperties.ReportSettings.Preview	

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Buttons	Function / Action	HelpID	Hot Key
Print	Prints the report to the selected Print to destination – printer or file.	Portal.StyleProperties.ReportSettings.Print	
Save To	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

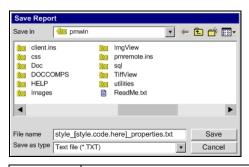
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Υ	Option 1 of 2	n/a	Portal.StyleProperti es.ReportSettings.G eneralPageOrientati on.Landscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Υ	Option 1 of 2	n/a	Portal.StyleProperti es.ReportSettings.G eneralPageOrientati on.Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	Portal.StyleProperti es.ReportSettings.G eneralPrintSystemD ate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	Portal.StyleProperti es.ReportSettings.G eneralPrintto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\style_[code]_properties.txt	Υ	n/a	Portal.StyleProperti es.ReportSettings.G eneralPrintto.File(pa th/filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	Portal.StyleProperti es.ReportSettings.G eneralPrintto.Printer	
Report Title	This is the title that prints on all report pages.	Text	"[description] Style Properties"	N	n/a	Portal.StyleProperti es.ReportSettings.G eneralReportTitle	

Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save
- When the report has been saved to the file, a dialog box appears advising the user of this.
- After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.27. Portal Settings – Style Properties – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	Portal.StyleProperties.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.2 Manage Styles Use Cases 10.2.2 Manage Styles – Create New Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	Portal.StyleProperties.ReportSettings.General.SaveT o.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	Portal.StyleProperties.ReportSettings.General.SaveT o.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	Portal.StyleProperties.ReportSettings.General.SaveT o.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	Portal.StyleProperties.ReportSettings.General.SaveT o.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	Portal.StyleProperties.ReportSettings.General.SaveT o.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
	, , , ,	Portal.StyleProperties.ReportSettings.General.SaveT o.Lookup.Views	

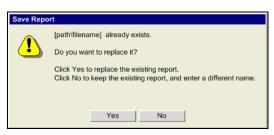
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	style_[code]_propert ies.txt	Υ	n/a	Portal.StyleProperti es.ReportSettings.G eneral.SaveTo.Look up.FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	Portal.StyleProperti es.ReportSettings.G eneral.SaveTo.Look up.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	Portal.StyleProperti es.ReportSettings.G eneral.SaveTo.Look up.SaveAsType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	Portal.StyleProperti es.ReportSettings.G eneral.SaveTo.Look up.SaveIn	

Special Rules and Clarifications

^{1.} If the **File name** exists in the **Save in** location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the **Save Report** dialog box (No) where they can modify the values in either the **File name** or **Save in** fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Style Properties – Report Settings – General – Save Report (exists) [Ph3] 9.28.



General	Description
HelpID	Portal.StyleProperties.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.2 Manage Styles Use Cases 10.2.2 Manage Styles – Create New Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	9	Portal.StyleProperties.ReportSettings.General.SaveT o.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	Portal.StyleProperties.ReportSettings.General.SaveT o.Warning.Yes	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Style Properties – Report Settings – General – Save Report Success [Ph3] 9.29.



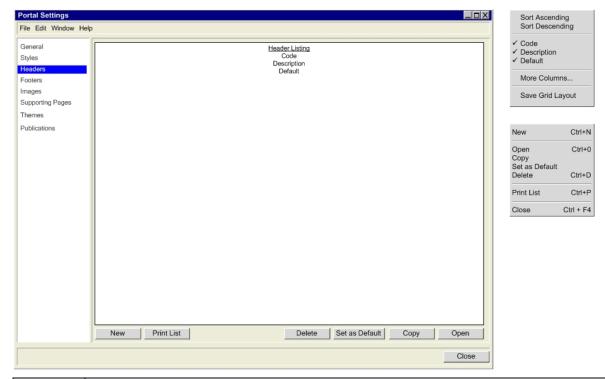
General	Description
HelpID	Portal.StyleProperties.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.2 Manage Styles Use Cases 10.2.2 Manage Styles – Create New Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK	9	Portal.StyleProperties.ReportSettings.General.SaveR eportSuccess.OK	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description	
1.00	02/26/2002	TAF	Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

9.30. Portal Settings – Headers Listing [Ph2]



General	Description
HelpID	PortalSettings.HeadersListing
Title	Portal Settings → Headers
Usage	Displays a list of headers that are available for use on portals.
Туре	Listing
Open Focus	Grid
Tab Order	 New Print List Delete Set as Default Copy Open Close Grid
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header 10.3.5 Manage Headers – Print Header Properties 10.3.6 Manage Headers – Deleting Existing Header

ntegration	

General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

Buttons	Function / Action	HelpID	Hot Key
Close	See 9.1 Portal Settings – General for details on the functionality of the Close button.		
Сору	Opens a Header Properties DE form with the Code and Description field blank; however, all other fields are populated with the values from the selected style.	PortalSettings.HeadersListing.Copy	
Delete	Deletes the selected header, but first displays a dialog box which gives the user the option of proceeding with deleting the header or keeping it.	PortalSettings.HeadersListing.Delete	
New	Opens a blank Header Properties DE form so the user can create a new header.	PortalSettings.HeadersListing.New	
Open	Opens the Header Properties DE form of the selected header.	PortalSettings.HeadersListing.Open	
Print List	Prints the list of headers to a file or printer.	PortalSettings.HeadersListing.PrintList	
Set as Default	Sets the selected header as the default header for portals.	PortalSettings.HeadersListing.SetasDefault	
	There can be only one default header selected.		
	When the user clicks Set as Default , check to see if an existing default exists for headers. If one does exist, display a dialog box that gives the user the option of making the selected header the default (Yes), or keeping the current default for headers (No).		

Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the header.	PortalSettings.Head ersListing.Code	
Default	This field, when populated, indicates the header is the default for portals.	PortalSettings.Head ersListing.Default	
Description	This is the description of the header.	PortalSettings.Head ersListing.Description	

Special Rules and Clarifications

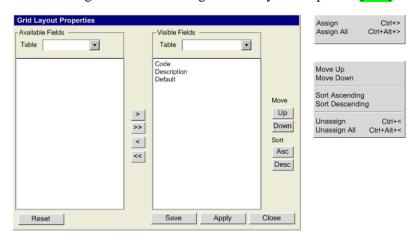
- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- The grid includes a shortcut menu for the records listing, allowing the user to create a new header, open, copy, set as default or delete an existing header that has been selected; print the list of headers, or close the window.

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Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.
1.02	03/03/2002	TAF	Change HELPID from ".Headers" to ".HeadersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.31. Portal Settings – Headers Listing – Grid Layout Properties [Ph2]



General	Description
HelpID	PortalSettings.HeadersListing.GridLayoutProperties
Title	Grid Layout Properties
Usage	Defines the grid layout properties for the Headers listing, including visible fields, column order, and sort order.
Туре	Modal Dialog
Open Focus	Available Fields – Table
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table
Related Use Cases	10.3.1 Manage Headers – List Headers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.HeadersListing.GridLayoutProperties. Apply	

Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.HeadersListing.GridLayoutProperties. Assign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.HeadersListing.GridLayoutProperties. AssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	PortalSettings.HeadersListing.GridLayoutProperties. Close	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.HeadersListing.GridLayoutProperties. MoveDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.HeadersListing.GridLayoutProperties. MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.HeadersListing.GridLayoutProperties. Reset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.HeadersListing.GridLayoutProperties. Save	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.HeadersListing.GridLayoutProperties. SortAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.HeadersListing.GridLayoutProperties. SortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.HeadersListing.GridLayoutProperties. Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.HeadersListing.GridLayoutProperties. UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Head ersListing.GridLayo utProperties.Availab leFields	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Head ersListing.GridLayo utProperties.Availab leFields.Table	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing						
Visible Fields	These are the fields that are visible on the grid. The fields appear from left to right in the same order they are listed from top to bottom.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Head ersListing.GridLayo utProperties.Visible Fields	
	The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.						
Visible Fields – Table	This is the table from which the list of Visible Fields is listed. All Tables is one of the drop-down list options, which means all tables applicable to the listing	Drop-down List	All Tables	n/a	n/a	PortalSettings.Head ersListing.GridLayo utProperties.Visible Fields.Table	

Special Rules and Clarifications Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

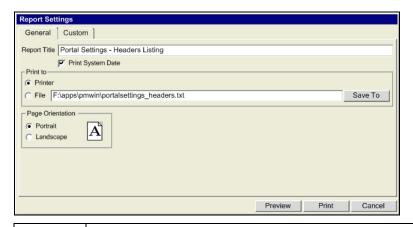
Rev No.	Rev Date	Rev By	Revision Description

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".Headers" to ".HeadersListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

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9.32. Portal Settings – Headers Listing – Report Settings – General [Ph3]



General	Description
HelpID	PortalSettings.HeadersListing.ReportSettings.General
Title	Report Settings → General
Usage	Sets general parameters for printing the Headers listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Report Title
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close
Related Use Cases	10.3.1 Manage Headers – List Headers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.HeadersListing.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.HeadersListing.ReportSettings.Previe w	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.HeadersListing.ReportSettings.Print	

Buttons	Function / Action	HelpID	Hot Key
Save To	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

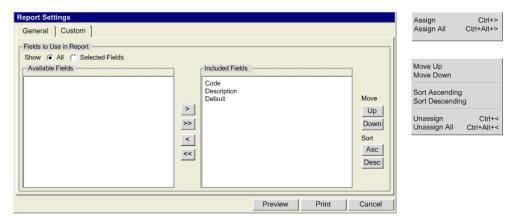
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Y	Option 1 of 2	n/a	PortalSettings.Head ersListing.ReportSet tings.GeneralPageO rientation.Landscap e	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Υ	Option 1 of 2	n/a	PortalSettings.Head ersListing.ReportSet tings.GeneralPageO rientation.Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Head ersListing.ReportSet tings.GeneralPrintS ystemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Head ersListing.ReportSet tings.GeneralPrintto. File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_headers.txt	Υ	n/a	PortalSettings.Head ersListing.ReportSet tings.GeneralPrintto. File(path/filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	PortalSettings.Head ersListing.ReportSet tings.GeneralPrintto. Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Headers Listing"	N	n/a	PortalSettings.Head ersListing.ReportSet tings.GeneralReport Title	

Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- When the report has been saved to the file, a dialog box appears advising the user of this.
- After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Headers" to ".HeadersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.33. Portal Settings – Headers Listing – Report Settings – Custom [Ph3]



General	Description
HelpID	PortalSettings.HeadersListing.ReportSettings.Custom
Title	Report Settings \rightarrow Custom
Usage	Sets custom parameters for printing the Headers listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Show – All
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All
Related Use Cases	10.3.1 Manage Headers – List Headers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	Function / Action HelpID	
Assign (>)	9	PortalSettings.HeadersListing.ReportSettings.Custo m.Assign	

Buttons	Function / Action	HelpID	Hot Key
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.HeadersListing.ReportSettings.Custo m.AssignAll	
Cancel	The functionality of this button defined with General Report Settings.	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.HeadersListing.ReportSettings.Custo m.MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.HeadersListing.ReportSettings.Custo m.MoveUp	
Preview	The functionality of this button defined with General Report Settings.	n/a	
Print	The functionality of this button defined with General Report Settings.	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.HeadersListing.ReportSettings.Custo m.SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.HeadersListing.ReportSettings.Custo m.SortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.HeadersListing.ReportSettings.Custo m.Unassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.HeadersListing.ReportSettings.Custo m.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Head ersListing.ReportSet tings.Custom.Availa bleFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Head ersListing.ReportSet tings.Custom.Includ edFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Y	Option 1 of 2	n/a	PortalSettings.Head ersListing.ReportSet tings.Custom.Show. All	

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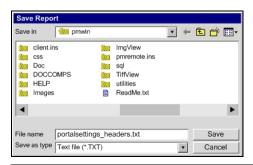
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	Only shows fields that appear on the Headers Listing.		N	Option 1 of 2		PortalSettings.Head ersListing.ReportSet tings.Custom.Show. Selected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Headers" to ".HeadersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.34. Portal Settings – Headers Listing – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	PortalSettings.HeadersListing.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.3.1 Manage Headers – List Headers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
		PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Lookup.Views	

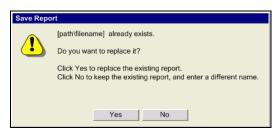
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_head ers.txt	Υ	n/a	PortalSettings.Head ersListing.ReportSet tings.General.SaveT o.Lookup.FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Head ersListing.ReportSet tings.General.SaveT o.Lookup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Head ersListing.ReportSet tings.General.SaveT o.Lookup.SaveAsTy pe	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Head ersListing.ReportSet tings.General.SaveT o.Lookup.SaveIn	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Headers" to ".HeadersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.35. Portal Settings – Headers Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.HeadersListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.3.1 Manage Headers – List Headers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.HeadersListing.ReportSettings.Genera I.SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description				
1.00	02/26/2002	TAF	Original Mockup				
1.01	03/03/2002	TAF	Change HELPID from ".Headers" to ".HeadersListing"				
1.10	03/18/2002	TAF	Final mockup for development review and coding.				

9.36. Portal Settings – Headers Listing – Report Settings – General – Save Report Success [Ph3]



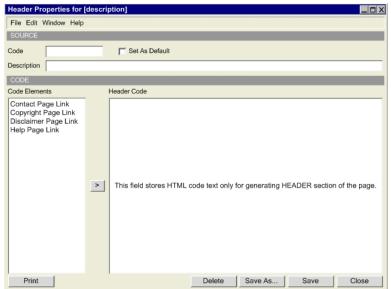
General	Description
HelpID	PortalSettings.HeadersListing.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.3.1 Manage Headers – List Headers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.HeadersListing.ReportSettings.Genera I.SaveReportSuccess.OK	

	Special Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Headers" to ".HeadersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.37. Portal Settings – Header Properties [Ph2]





General	Description
HelpID	Portal.HeaderProperties
Title	Header Properties for [description]where [description] is the header description.
Usage	Defines header properties.
Туре	Standard DE form
Open Focus	Code
Tab Order	 Set as Default Description Code Elements Copy (>) Copy All (>>) Header Code Print Delete Save As Save Close Code
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header 10.3.5 Manage Headers – Print Header Properties 10.3.6 Manage Headers – Deleting Existing Header

General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

Buttons	Function / Action	HelpID	Hot Key
Copy (>)	Copies the selected Code Elements into the Header Code field.	Portal.HeaderProperties.CopyElement	
Copy All (>>)	Copies all Code Elements into the Header Code field.	Portal.HeaderProperties.CopyAllElements	
Print	Prints the properties of the header, including the header code	Portal.HeaderProperties.Print	
Delete	Deletes the header.	Portal.HeaderProperties.Delete	
Save As	Displays a dialog box, allowing the user to save the existing header, including any unsaved changes, as a new header.	Portal.HeaderProperties.SaveAs	
	This is available only for existing headers.		
	The previous header record is closed without saving any changes that were made after the record was last saved.		
	The Header Properties DE form now appears populated for the new style.		
Save	Saves the header record.	Portal.HeaderProperties.Save	
	The window remains open after clicking Save . If the user then wants to apply the saved changes, they can click Close .		
Close	Closes the window.	Portal.HeaderProperties.Close	
	Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the header.	Code		Υ	Υ	Portal.HeaderPrope rties.Code	
Description	This is the description of the header.	Text		Υ	Υ	Portal.HeaderPrope rties.Description	
Header Code	This is the code for the portal header sheet.	Text – It would be best of the default font could be 10pt courier, and allow or both horizontal and vertical scrolling, with no wrapping.		N	N	Portal.HeaderPrope rties.HeaderCode	

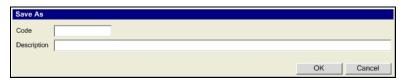
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Set as Default	This indicates this is the default portal header.	Checkbox	Unchecked	N	N	Portal.HeaderPrope rties.SetAsDefault	
	If the user checks Set as Default and then saves the record, check to see if an existing default exists for headers. If one does exist, display a dialog box that gives the user the option of making the active header the default (Yes), or keeping the current default for headers (No).						
Code Elements	This is a list of code elements available for the header.	Assign-type Selection List		n/a	n/a	Portal.HeaderPrope rties.CodeElements	
	Each element contains a code string that is copied into the Header Code field at the cursor's location.						

Special Rules and Clarifications

Code Elements should support multi-select.

Rev No.	Rev Date	Rev By	Revision Description	
1.00	02/26/2002	TAF	Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

Portal Settings – Header Properties – Save As [Ph2] 9.38.



General	Description
HelpID	Portal.HeaderProperties.SaveAs.Dialog
Title	Save As
Usage	Allows the user to save the existing header, including any unsaved changes, as a new header. This option is available only for existing headers. The previous header record is closed without saving any changes that were made after the record was last saved. The Header Properties DE form now appears populated for the new header.
Туре	Modal DE form
Open Focus	Code
Tab Order	 Description Set as Default OK Cancel Code
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
ОК	Save the existing header, including any unsaved changes, as a new header using the Code and Description entered.	Portal.HeaderProperties.Portal.SaveAs.Dialog.OK	
	This is available only for existing headers.		
	The previous header record is closed without saving any changes that were made after the record was last saved.		
	The Header Properties DE form now appears populated for the new header.		

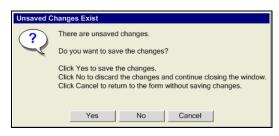
Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels the save as operation, and returns the user to the Header Properties DE form in the state it was left in when Save As was selected. Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes) and advancing to the Header Properties DE form for the new header, discarding the changes (No) and returning to the Header Properties DE form of the original existing header, or returning to the Save As DE form (Cancel).		,

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the header.	Code		Υ	Υ	Portal.HeaderPrope rties.SaveAs.Dialog. Code	
Description	This is the description of the header.	Text		Υ	Υ	Portal.HeaderPrope rties.SaveAs.Dialog. Description	
Set as Default	This indicates this is the default portal header.	Checkbox	Unchecked	N	N	Portal.HeaderPrope rties.SaveAs.Dialog. SetAsDefault	
	If the user checks Set as Default and then saves the record, check to see if an existing default exists for headers. If one does exist, display a dialog box that gives the user the option of making the new active header the default (Yes), or keeping the current default for headers (No).						

Special Rules and Clarifications
1. None.

Rev No.	Rev Date	Rev By	Revision Description	
1.00	02/26/2002	TAF	Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

9.39. Portal Settings – Header Properties – Unsaved Changes Exist [Ph2]



General	Description
HelpID	Portal.HeaderProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on the Header Properties window.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	 No Cancel Yes
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

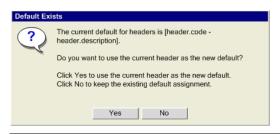
Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Header Properties window without saving or discarding the changes.	Portal.HeaderProperties.UnsavedChanges.Cancel	
No	Continues closing the Header Properties window, and discards any changes that have been made to the Header Properties since the last time the settings were saved.	Portal.HeaderProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Header Properties window.	Portal.HeaderProperties.UnsavedChanges.Yes	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

Printed: 06/12/2018 Last Updated: 07/15/2003

9.40. Portal Settings – Header Properties – Default Exists [Ph2]



General	Description
HelpID	Portal.HeaderProperties.DefaultExists
Title	Default Exists
Usage	Advises the user that a default already exists for headers, and gives them the option of using the active header as the new default or keeping the current default assignment.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates making the active/selected header the default. If the dialog box was opened from the Header Properties DE form, the Set as Default field in that record is cleared before the record is saved.	Portal.HeaderProperties.DefaultExists.No	
Yes	Makes the active/selected header the default, clearing the Set as Default field in the current default header, and populating the Set as Default field in the active/selected header.		

	Special Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

9.41. Portal Settings – Header Properties – Delete Confirmation [Ph2]



General	Description
HelpID	Portal.HeaderProperties.DeleteConfirmation
Title	Delete Confirmation
Usage	Allows the user to either continue deleting the header (Yes), or terminate deleting the header (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header 10.3.6 Manage Headers – Deleting Existing Header
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

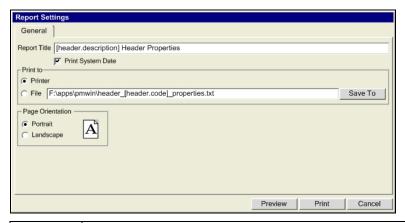
Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the header, and returns the user to the window from which the dialog box was opened.		
Yes	Continues deleting the header, and returns the user to the Headers listing.	Portal.HeaderProperties.DeleteConfirmation.Yes.	

Special Rules and Clarifications		
1. None.		

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018

9.42. Portal Settings – Header Properties – Report Settings – General [Ph3]



General	Description
HelpID	Portal.HeaderProperties.ReportSettings.General
Title	Report Settings → General
Usage	Sets general parameters for printing the Header Properties to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Report Title
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.2 Manage Headers – Create New Header 10.3.4 Manage Headers – Modify Existing Header 10.3.5 Manage Headers – Print Header Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	Portal.HeaderProperties.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	Portal.HeaderProperties.ReportSettings.Preview	

Buttons	Function / Action	HelpID	Hot Key
Print	Prints the report to the selected Print to destination – printer or file.	Portal.HeaderProperties.ReportSettings.Print	
Save To	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Υ	Option 1 of 2	n/a	Portal.HeaderPrope rties.ReportSettings. GeneralPageOrient ation.Landscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Υ	Option 1 of 2	n/a	Portal.HeaderPrope rties.ReportSettings. GeneralPageOrient ation.Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	Portal.HeaderPrope rties.ReportSettings. GeneralPrintSystem Date	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	Portal.HeaderPrope rties.ReportSettings. GeneralPrintto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\header_[co de]_properties.txt	Υ	n/a	Portal.HeaderPrope rties.ReportSettings. GeneralPrintto.File(path/filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	Portal.HeaderPrope rties.ReportSettings. GeneralPrintto.Print er	
Report Title	This is the title that prints on all report pages.	Text	"[description] Header Properties"	N	n/a	Portal.HeaderPrope rties.ReportSettings. GeneralReportTitle	

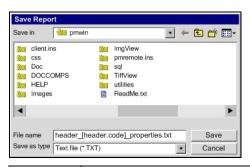
Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- 2. When the report has been saved to the file, a dialog box appears advising the user of this.
- 3. After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

9.43. Portal Settings – Header Properties – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	Portal.HeaderProperties.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.2 Manage Headers – Create New Header 10.3.4 Manage Headers – Modify Existing Header 10.3.5 Manage Headers – Print Header Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	Portal.HeaderProperties.ReportSettings.General.Sav eTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	Portal.HeaderProperties.ReportSettings.General.Sav eTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	Portal.HeaderProperties.ReportSettings.General.Sav eTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	Portal.HeaderProperties.ReportSettings.General.Sav eTo.Lookup.Save	

Buttons	Function / Action	HelpID	Hot Key
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	Portal.HeaderProperties.ReportSettings.General.Sav eTo.Lookup.Up	
Views	Allows the user to change the display properties of the folder/file grid.	Portal.HeaderProperties.ReportSettings.General.Sav eTo.Lookup.Views	

Last Updated: 07/15/2003

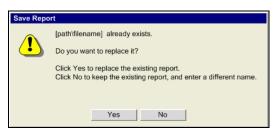
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	header_[code]_prop erties.txt	Υ	n/a	Portal.HeaderPrope rties.ReportSettings. General.SaveTo.Lo okup.FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	Portal.HeaderPrope rties.ReportSettings. General.SaveTo.Lo okup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	Portal.HeaderPrope rties.ReportSettings. General.SaveTo.Lo okup.SaveAsType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	Portal.HeaderPrope rties.ReportSettings. General.SaveTo.Lo okup.SaveIn	

Special Rules and Clarifications

^{1.} If the **File name** exists in the **Save in** location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the **Save Report** dialog box (No) where they can modify the values in either the **File name** or **Save in** fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.44. Portal Settings – Header Properties – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	Portal.HeaderProperties.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.2 Manage Headers – Create New Header 10.3.4 Manage Headers – Modify Existing Header 10.3.5 Manage Headers – Print Header Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	Portal.ReportSettings.General.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	Portal.ReportSettings.General.SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

9.45. Portal Settings – Header Properties – Report Settings – General – Save Report Success [Ph3]



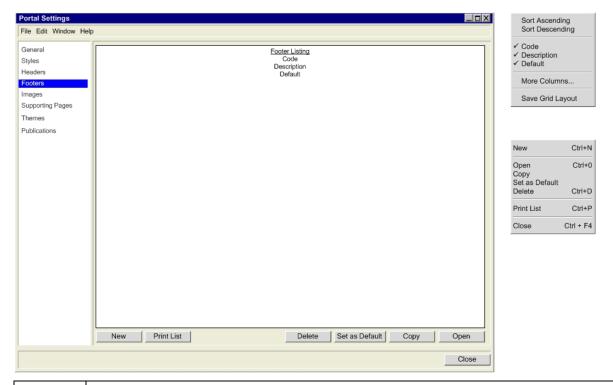
General	Description	
HelpID	Portal.HeaderProperties.ReportSettings.General.SaveReportSuccess	
Title	Save Report Success	
Usage	Advises the user the report file was successfully created.	
Туре	Modal Dialog	
Open Focus	ОК	
Tab Order	1. OK	
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.3 Manage Headers Use Cases 10.3.2 Manage Headers – Create New Header 10.3.4 Manage Headers – Modify Existing Header 10.3.5 Manage Headers – Print Header Properties	
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.	

Buttons	Function / Action	HelpID	Hot Key
OK		Portal.HeaderProperties.ReportSettings.General.Sav eReportSuccess.OK	

Special Rules and Clarifications		
1. None.		

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.46. Portal Settings – Footers Listing [Ph2]



General	Description
HelpID	PortalSettings.FootersListing
Title	Portal Settings → Footers
Usage	Displays a list of footers that are available for use on portals.
Туре	Listing
Open Focus	Grid
Tab Order	 New Print List Delete Set as Default Copy Open Close Grid
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.6 Manage Footers – Deleting Existing Footer
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

Buttons	Function / Action	HelpID	Hot Key				
Close	See 9.1 Portal Settings – General for details on the functionality of the Close button.						
Сору	Opens a Footer Properties DE form with the Code and Description field blank; however, all other fields are populated with the values from the selected style.	PortalSettings.FootersListing.Copy					
Delete	Deletes the selected footer, but first displays a dialog box which gives the user the option of proceeding with deleting the footer or keeping it.	PortalSettings.FootersListing.Delete					
New	Opens a blank Footer Properties DE form so the user can create a new footer.	PortalSettings.FootersListing.New					
Open	Opens the Footer Properties DE form of the selected footer.	PortalSettings.FootersListing.Open					
Print List	Prints the list of footers to a file or printer.	PortalSettings.FootersListing.PrintList					
Set as Default	Sets the selected footer as the default footer for portals.	PortalSettings.FootersListing.SetasDefault					
	There can be only one default footer selected.						
	When the user clicks Set as Default , check to see if an existing default exists for footers. If one does exist, display a dialog box that gives the user the option of making the selected footer the default (Yes), or keeping the current default for footers (No).						

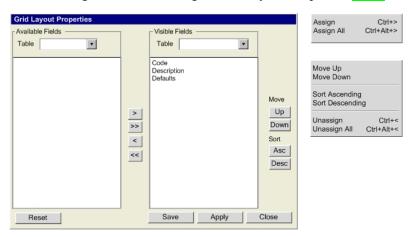
Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the footer.	PortalSettings.Foote rsListing.Code	
Default	This field, when populated, indicates the footer is the default for portals.	PortalSettings.Foote rsListing.Default	
Description	This is the description of the footer.	PortalSettings.Foote rsListing.Description	

Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- 2. The grid includes a shortcut menu for the records listing, allowing the user to create a new footer, open, copy, set as default or delete an existing footer that has been selected; print the list of footers, or close the window.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.
1.02	03/03/2002	TAF	Change HELPID from ".Footers" to ".FootersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.47. Portal Settings – Footers Listing – Grid Layout Properties [Ph2]



General	Description
HelpID	PortalSettings.FootersListing.GridLayoutProperties
Title	Grid Layout Properties
Usage	Defines the grid layout properties for the Footers listing, including visible fields, column order, and sort order.
Туре	Modal Dialog
Open Focus	Available Fields – Table
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table
Related Use Cases	10.4.1 Manage Footers – List Footers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

Buttons	Function / Action	HelpID	Hot Key
11 7	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.FootersListing.GridLayoutProperties.A pply	

Buttons	Function / Action	HelpID	
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.FootersListing.GridLayoutProperties.A ssign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.FootersListing.GridLayoutProperties.A ssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	PortalSettings.FootersListing.GridLayoutProperties.Cl ose	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.FootersListing.GridLayoutProperties.M oveDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.FootersListing.GridLayoutProperties.M oveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.FootersListing.GridLayoutProperties.R eset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.FootersListing.GridLayoutProperties.S ave	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.FootersListing.GridLayoutProperties.S ortAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.FootersListing.GridLayoutProperties.S ortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.FootersListing.GridLayoutProperties.Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.FootersListing.GridLayoutProperties.U nassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Foote rsListing.GridLayout Properties.Available Fields	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Foote rsListing.GridLayout Properties.Available Fields.Table	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing						
Visible Fields	These are the fields that are visible on the grid. The fields appear from left to right in the same order they are listed from top to bottom.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Foote rsListing.GridLayout Properties.VisibleFi elds	
	The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.						
Visible Fields – Table	This is the table from which the list of Visible Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Foote rsListing.GridLayout Properties.VisibleFi	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing					elds.Table	

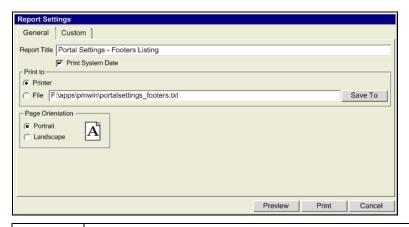
Special Rules and Clarifications . Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.01	03/03/2002	TAF Change HELPID from ".Footers" to ".FootersListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

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9.48. Portal Settings – Footers Listing – Report Settings – General [Ph3]



General	Description
HelpID	PortalSettings.FootersListing.ReportSettings.General
Title	Report Settings → General
Usage	Sets general parameters for printing the Footers listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Report Title
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close
Related Use Cases	10.4.1 Manage Footers – List Footers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.FootersListing.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.FootersListing.ReportSettings.Preview	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.FootersListing.ReportSettings.Print	

Buttons	Function / Action	HelpID	Hot Key
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

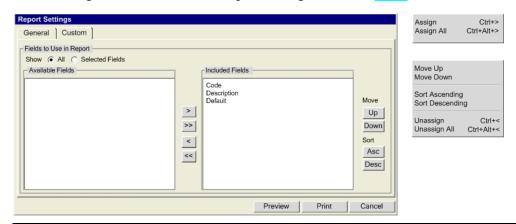
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Υ	Option 1 of 2	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.GeneralPageOri entation.Landscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Y	Option 1 of 2	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.GeneralPageOri entation.Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.GeneralPrintSy stemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.GeneralPrintto. File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_footers.txt	Υ	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.GeneralPrintto. File(path/filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.GeneralPrintto. Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Footers Listing"	N	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.GeneralReportT itle	

Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- When the report has been saved to the file, a dialog box appears advising the user of this.
- After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".Footers" to ".FootersListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.49. Portal Settings – Footers Footers – Report Settings – Custom [Ph3]



General	Description				
HelpID	PortalSettings.FootersListing.ReportSettings.Custom				
Title	Report Settings \rightarrow Custom				
Usage	Sets custom parameters for printing the Footers listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.				
Туре	Modal Dialog				
Open Focus	Show – All				
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All 				
Related Use Cases	10.4.1 Manage Footers – List Footers				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Assigns the selected Available Fields , including them in the report.	PortalSettings.FootersListing.ReportSettings.Custom. Assign	

Buttons	Function / Action	HelpID	Hot Key
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.FootersListing.ReportSettings.Custom. AssignAll	
Cancel	The functionality of this button defined with General Report Settings .	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.FootersListing.ReportSettings.Custom. MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.FootersListing.ReportSettings.Custom. MoveUp	
Preview	The functionality of this button defined with General Report Settings .	n/a	
Print	The functionality of this button defined with General Report Settings .	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.FootersListing.ReportSettings.Custom. SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.FootersListing.ReportSettings.Custom. SortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.FootersListing.ReportSettings.Custom. Unassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.FootersListing.ReportSettings.Custom. UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.Custom.Availabl eFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.Custom.Include dFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Y	Option 1 of 2	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.Custom.Show.A II	

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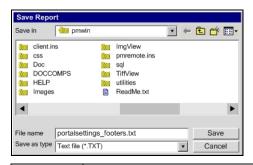
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	Only shows fields that appear on the Footers Listing.		N	Option 1 of 2		PortalSettings.Foote rsListing.ReportSetti ngs.Custom.Show.S elected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Footers" to ".FootersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.50. Portal Settings – Footers Listing – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	PortalSettings.FootersListing.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.4.1 Manage Footers – List Footers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action HelpID		Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
	Allows the user to change the display properties of the folder/file grid.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Lookup.Views	

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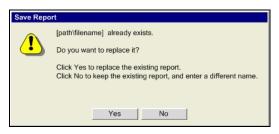
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_foote rs.txt	Υ	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.General.SaveT o.Lookup.FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.General.SaveT o.Lookup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.General.SaveT o.Lookup.SaveAsTy pe	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Foote rsListing.ReportSetti ngs.General.SaveT o.Lookup.SaveIn	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Footers" to ".FootersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.51. Portal Settings – Footers Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.FootersListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.4.1 Manage Footers – List Footers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.FootersListing.ReportSettings.General .SaveTo.Warning.Yes	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Footers" to ".FootersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Footers Listing – Report Settings – General – Save Report Success [Ph3] 9.52.



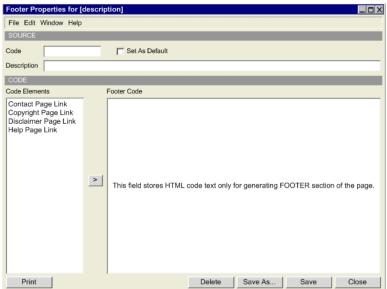
General	Description
HelpID	PortalSettings.FootersListing.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.4.1 Manage Footers – List Footers
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.FootersListing.ReportSettings.General .SaveReportSuccess.OK	

Special Rules and Clarifications			
1. None.			

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Footers" to ".FootersListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.53. Portal Settings – Footer Properties [Ph2]





General	Description		
HelpID	Portal.FooterProperties		
Title	Footer Properties for [description]where [description] is the footer description.		
Usage	Defines footer properties.		
Туре	Standard DE form		
Open Focus	Code		
Tab Order	 Set as Default Description Code Elements Copy (>) Copy All (>>) Footer Code Print Delete Save As Save Close Code 		
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.5 Manage Footers – Print Footer Properties 10.4.6 Manage Footers – Deleting Existing Footer		

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General	Description
Considerations	Phase 1 – Not required. Phase 2 – No changes. Phase 3 – Add printing.

Buttons	Function / Action	HelpID	Hot Key
Copy (>)	Copies the selected Code Elements into the Footer Code field.	Portal.FooterProperties.CopyElement	
Copy All (>>)	Copies all Code Elements into the Footer Code field.	Portal.FooterProperties.CopyAllElements	
Print	Prints the properties of the footer, including the footer code	Portal.FooterProperties.Print	
Delete	Deletes the footer.	Portal.FooterProperties.Delete	
Save As	Displays a dialog box, allowing the user to save the existing footer, including any unsaved changes, as a new footer.	Portal.FooterProperties.SaveAs	
	This is available only for existing footers.		
	The previous footer record is closed without saving any changes that were made after the record was last saved.		
	The Footer Properties DE form now appears populated for the new style.		
Save	Saves the footer record.	Portal.FooterProperties.Save	
	The window remains open after clicking Save . If the user then wants to apply the saved changes, they can click Close .		
Close	Closes the window.	Portal.FooterProperties.Close	
	Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the footer.	Code		Υ	Υ	Portal.FooterPropert ies.Code	
Code Elements	This is a list of code elements available for the footer.	Assign-type Selection List		n/a	n/a	Portal.FooterPropert ies.CodeElements	
	Each element contains a code string that is copied into the Footer Code field at the cursor's location.						
Description	This is the description of the footer.	Text		Υ	Υ	Portal.FooterPropert ies.Description	

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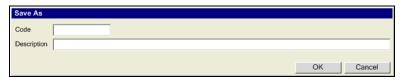
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Footer Code	This is the code for the portal footer sheet.	Text – It would be best of the default font could be 10pt courier, and allow or both horizontal and vertical scrolling, with no wrapping.		N	N	Portal.FooterPropert ies.FooterCode	
Set as Default	This indicates this is the default portal footer. If the user checks Set as Default and then saves the record, check to see if an existing default exists for footers. If one does exist, display a dialog box that gives the user the option of making the active footer the default (Yes), or keeping the current default for foioters (No).	Checkbox	Unchecked	N	N	Portal.FooterPropert ies.SetAsDefault	

Special Rules and Clarifications

1. Code Elements should support multi-select.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.54. Portal Settings – Footer Properties – Save As [Ph2]



General	Description					
HelpID	Portal.FooterProperties.SaveAs.Dialog					
Title	Save As					
Usage	Allows the user to save the existing footer, including any unsaved changes, as a new footer. This option is available only for existing footers. The previous footer record is closed without saving any changes that were made after the record was last saved. The Footer Properties DE form now appears populated for the new footer.					
Туре	Modal DE form					
Open Focus	Code					
Tab Order	 Description Set as Default OK Cancel Code 					
Related Use Cases	10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer					
Phasing Considerations	Phase 1 – Not required. Phase 2 – No changes. Phase 3 – No changes.					

Buttons	Function / Action	HelpID	Hot Key
OK	Save the existing footer, including any unsaved changes, as a new footer using the Code and Description entered.	Portal.FooterProperties.Portal.SaveAs.Dialog.OK	
	This is available only for existing footers.		
	The previous footer record is closed without saving any changes that were made after the record was last saved.		
	The Footer Properties DE form now appears populated for the new footer.		
Cancel	Cancels the save as operation, and returns the user to the Footer Properties DE form in the state it was left in when Save As was selected.	Portal.FooterProperties.Portal.SaveAs.Dialog.Cancel	
	Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes) and advancing to the Footer Properties DE form for the new footer, discarding the changes (No) and returning to the Footer Properties DE form of the original existing footer, or returning to the Save As DE form (Cancel).		

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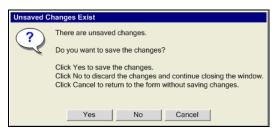
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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the footer.	Code		Υ	Υ	Portal.FooterPropert ies.SaveAs.Dialog.	
Description	This is the description of the footer.	Text		Υ	Υ	Portal.FooterPropert ies.SaveAs.Dialog. Description	
Set as Default	This indicates this is the default portal footer. If the user checks Set as Default and then saves the record, check to see if an existing default exists for footers. If one does exist, display a dialog box that gives the user the option of making the new active footer the default (Yes), or keeping the current default for footers (No).	Checkbox	Unchecked	N	N	Portal.FooterPropert ies.SaveAs.Dialog.S etAsDefault	

S	pecial Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.55. Portal Settings – Footer Properties – Unsaved Changes Exist [Ph2]



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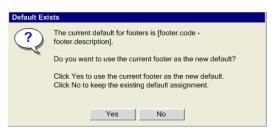
General	Description
HelpID	Portal.FooterProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on the Footer Properties window.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	 No Cancel Yes
Related Use Cases	10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Footer Properties window without saving or discarding the changes.	Portal.FooterProperties.UnsavedChanges.Cancel	
No	Continues closing the Footer Properties window, and discards any changes that have been made to the Footer Properties since the last time the settings were saved.	Portal.FooterProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Footer Properties window.	Portal.FooterProperties.UnsavedChanges.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.56. Portal Settings – Footer Properties – Default Exists [Ph2]



General	Description
HelpID	Portal.FooterProperties.DefaultExists
Title	Default Exists
Usage	Advises the user that a default already exists for footers, and gives them the option of using the active footer as the new default or keeping the current default assignment.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates making the active/selected footer the default. If the dialog box was opened from the Footer Properties DE form, the Set as Default field in that record is cleared before the record is saved.	Portal.FooterProperties.DefaultExists.No	
Yes	Makes the active/selected footer the default, clearing the Set as Default field in the current default footer, and populating the Set as Default field in the active/selected footer.	Portal.FooterProperties.DefaultExists.Yes.	

Special Rules and Clarifications		
1. None.		

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.57. Portal Settings – Footer Properties – Delete Confirmation [Ph2]



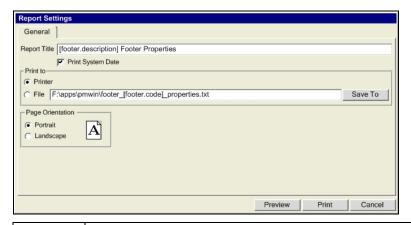
General	Description
HelpID	Portal.FooterProperties.DeleteConfirmation
Title	Delete Confirmation
Usage	Allows the user to either continue deleting the footer (Yes), or terminate deleting the footer (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.6 Manage Footers – Deleting Existing Footer
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the footer, and returns the user to the window from which the dialog box was opened.	Portal.FooterProperties.DeleteConfirmation.No	
Yes	Continues deleting the footer, and returns the user to the Footers listing.	Portal.FooterProperties.DeleteConfirmation.Yes.	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.58. Portal Settings – Footer Properties – Report Settings – General [Ph3]



General	Description				
HelpID	Portal.FooterProperties.ReportSettings.General				
Title	Report Settings → General				
Usage	Sets general parameters for printing the Footer Properties to a printer of file. Also gives the user the option of reviewing the report, with or without printing.				
Туре	Modal Dialog				
Open Focus	Report Title				
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close 				
Related Use Cases	10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.5 Manage Footers – Print Footer Properties				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	Portal.FooterProperties.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	Portal.FooterProperties.ReportSettings.Preview	

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Buttons	Function / Action	HelpID	Hot Key
Print	Prints the report to the selected Print to destination – printer or file.	Portal.FooterProperties.ReportSettings.Print	
Save To	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

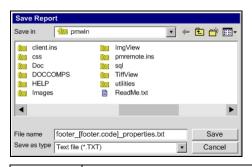
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Υ	Option 1 of 2	n/a	Portal.FooterPropert ies.ReportSettings. GeneralPageOrient ation.Landscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Υ	Option 1 of 2	n/a	Portal.FooterPropert ies.ReportSettings. GeneralPageOrient ation.Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	Portal.FooterPropert ies.ReportSettings. GeneralPrintSystem Date	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	Portal.FooterPropert ies.ReportSettings. GeneralPrintto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\footer_[cod e]_properties.txt	Υ	n/a	Portal.FooterPropert ies.ReportSettings. GeneralPrintto.File(path/filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	Portal.FooterPropert ies.ReportSettings. GeneralPrintto.Print er	
Report Title	This is the title that prints on all report pages.	Text	"[description] Footer Properties"	N	n/a	Portal.FooterPropert ies.ReportSettings. GeneralReportTitle	

Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- 2. When the report has been saved to the file, a dialog box appears advising the user of this.
- 3. After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

9.59. Portal Settings – Footer Properties – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	Portal.FooterProperties.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.5 Manage Footers – Print Footer Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	Portal.FooterProperties.ReportSettings.General.Save To.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	Portal.FooterProperties.ReportSettings.General.Save To.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	Portal.FooterProperties.ReportSettings.General.Save To.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	Portal.FooterProperties.ReportSettings.General.Save To.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	Portal.FooterProperties.ReportSettings.General.Save To.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
Views	3 1 31 1	Portal.FooterProperties.ReportSettings.General.Save To.Lookup.Views	

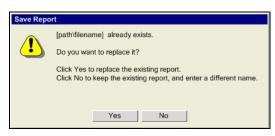
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	footer_[code]_prope rties.txt	Υ	n/a	Portal.FooterPropert ies.ReportSettings. General.SaveTo.Lo okup.FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	Portal.FooterPropert ies.ReportSettings. General.SaveTo.Lo okup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	Portal.FooterPropert ies.ReportSettings. General.SaveTo.Lo okup.SaveAsType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	Portal.FooterPropert ies.ReportSettings. General.SaveTo.Lo okup.SaveIn	

Special Rules and Clarifications

^{1.} If the **File name** exists in the **Save in** location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the **Save Report** dialog box (No) where they can modify the values in either the **File name** or **Save in** fields.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

Portal Settings – Footer Properties – Report Settings – General – Save Report (exists) [Ph3] 9.60.



General	Description
HelpID	Portal.FooterProperties.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.5 Manage Footers – Print Footer Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	Portal.ReportSettings.General.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	Portal.ReportSettings.General.SaveTo.Warning.Yes	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Footer Properties – Report Settings – General – Save Report Success [Ph3] 9.61.



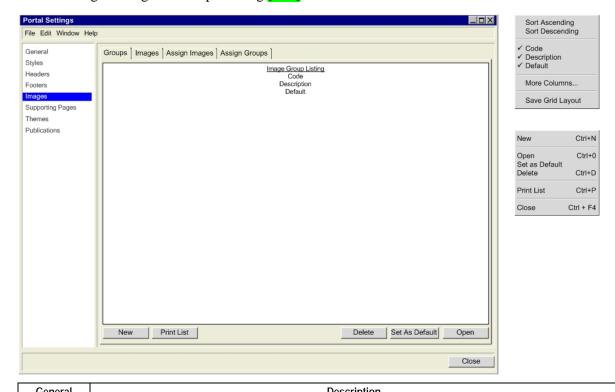
General	Description
HelpID	Portal.FooterProperties.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.5 Manage Footers – Print Footer Properties
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		Portal.FooterProperties.ReportSettings.General.Save ReportSuccess.OK	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.62. Portal Settings – Images – Groups Listing [Ph2]



General	Description		
HelpID	PortalSettings.Images.GroupsListing		
Title	Portal Settings → Images → Groups		
Usage	Displays a list of image groups that are available for use on portals.		
Туре	Listing		
Open Focus	Grid		
Tab Order	 New Print List Delete Set as Default Open Close Grid 		
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group 10.5.4 Manage Image Settings – Deleting Existing Image Group		
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.		

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Buttons	Function / Action	HelpID	Hot Key
Close	See 9.1 Portal Settings – General for details on the fur	nctionality of the Close button.	
Delete	Deletes the selected image group, but first displays a dialog box which gives the user the option of proceeding with deleting the image group or keeping it.	PortalSettings.Images.GroupsListing.Delete	
New	Opens a blank Image Group Properties DE form so the user can create a new image group.	PortalSettings.Images.GroupsListing.New	
Open	Opens the Image Group Properties DE form of the selected image group.	PortalSettings.Images.GroupsListing.Open	
Print List	Prints the list of image groups to a file or printer.	PortalSettings.Images.GroupsListing.PrintList	
Set as Default	Sets the selected image group as the default image group for portals.	PortalSettings.Images.GroupsListing.SetasDefault	
	There can be only one default image group selected.		
	When the user clicks Set as Default , check to see if an existing default exists for image groups. If one does exist, display a dialog box that gives the user the option of making the selected image group the default (Yes), or keeping the current default for image groups (No).		

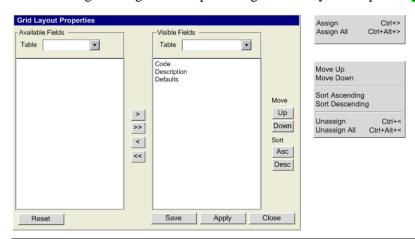
Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the image group.	PortalSettings.Imag es.GroupsListing.Co de	
Default	This field, when populated, indicates the image group is the default for portals.	PortalSettings.Imag es.GroupsListing.De fault	
Description	This is the description of the image group.	PortalSettings.Imag es.GroupsListing.De scription	

Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- 2. The grid includes a shortcut menu for the records listing, allowing the user to create a new image group, open, copy, set as default or delete an existing image group that has been selected; print the list of image groups, or close the window.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.
1.02	03/03/2002	TAF	Change HELPID from ".Groups" to ".GroupsListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.63. Portal Settings – Images – Groups Listing – Grid Layout Properties [Ph2]



General	Description
HelpID	PortalSettings.Images.GroupsListing.GridLayoutProperties
Title	Grid Layout Properties
Usage	Defines the grid layout properties for the Image Groups listing, including visible fields, column order, and sort order.
Туре	Modal Dialog
Open Focus	Available Fields – Table
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.Apply	

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Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.Assign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.AssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.Close	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.MoveDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.Reset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.Save	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.Images.GroupsListing.GridLayoutProperties.SortAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.Images.GroupsListing.GridLayoutProperties.SortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.Images.GroupsListing.GridLayoutProperties.Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.Images.GroupsListing.GridLayoutProp erties.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.	Assignment Panel Listing	Filtered by selection in Table field	n/a		PortalSettings.lmag es.GroupsListing.Gri dLayoutProperties.A vailableFields	

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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed. All Tables is one of	Drop-down List	All Tables	n/a	n/a	PortalSettings.lmag es.GroupsListing.Gri dLayoutProperties.A vailableFields.Table	
	the drop-down list options, which means all tables applicable to the listing						
Visible Fields	These are the fields that are visible on the grid. The fields appear from left to right in the same order they are listed from top to bottom.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.lmag es.GroupsListing.Gri dLayoutProperties.V isibleFields	
	The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.						
Visible Fields – Table	This is the table from which the list of Visible Fields is listed. All Tables is one of the drop-down list options, which means all tables applicable to the listing	Drop-down List	All Tables	n/a	n/a	PortalSettings.lmag es.GroupsListing.Gri dLayoutProperties.V isibleFields.Table	

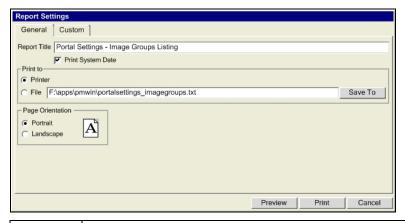
Special Rules and Clarifications

Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".Groups" to ".GroupsListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

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9.64. Portal Settings – Images – Groups Listing – Report Settings – General [Ph3]



General	Description					
HelpID	PortalSettings.Images.GroupsListing.ReportSettings.General					
Title	ort Settings → General					
Usage	ets general parameters for printing the Image Groups listing to a printer of file. Also gives the user the option of eviewing the report, with or without printing.					
Туре	Modal Dialog					
Open Focus	Report Title					
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close 					
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups					
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.					

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.Images.GroupsListing.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.Images.GroupsListing.ReportSettings. Preview	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.Images.GroupsListing.ReportSettings. Print	

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Buttons	Function / Action	HelpID	Hot Key
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Y	Option 1 of 2	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera IPageOrientation.La ndscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Y	Option 1 of 2	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera IPageOrientation.Po rtrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera IPrintSystemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera IPrintto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_image groups.txt	Υ	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera IPrintto.File(path/file name)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera IPrintto.Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Image Groups Listing"	N	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera IReportTitle	

Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- 2. When the report has been saved to the file, a dialog box appears advising the user of this.
- 3. After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

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1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".Groups" to ".GroupsListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.65. Portal Settings – Images – Groups Listing – Report Settings – Custom [Ph3]



General	Description
HelpID	PortalSettings.Images.GroupsListing.ReportSettings.Custom
Title	Report Settings \rightarrow Custom
Usage	Sets custom parameters for printing the Image Groups listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Show – All
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
0	Assigns the selected Available Fields , including them in the report.	PortalSettings.Images.GroupsListing.ReportSettings. Custom.Assign	

Buttons	Function / Action	HelpID	Hot Key
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.Images.GroupsListing.ReportSettings.Custom.AssignAll	
Cancel	The functionality of this button defined with General Report Settings.	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.Images.GroupsListing.ReportSettings.Custom.MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.Images.GroupsListing.ReportSettings.Custom.MoveUp	
Preview	The functionality of this button defined with General Report Settings.	n/a	
Print	The functionality of this button defined with General Report Settings.	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.Images.GroupsListing.ReportSettings.Custom.SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.Images.GroupsListing.ReportSettings.Custom.SortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.Images.GroupsListing.ReportSettings.Custom.Unassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.Images.GroupsListing.ReportSettings. Custom.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Custom .AvailableFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.lmag es.GroupsListing.Re portSettings.Custom .lncludedFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Y	Option 1 of 2	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Custom .Show.All	

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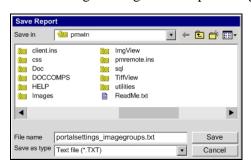
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	,	Option – In a set with All	N	Option 1 of 2		PortalSettings.Imag es.GroupsListing.Re portSettings.Custom .Show.Selected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Groups" to ".GroupsListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.66. Portal Settings – Images – Groups Listing – Report Settings – General – Save Report (save) [Ph3]



General	Description				
HelpID	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Lookup				
Title	Save Report				
Usage	Defines the file name and location where the report will be stored for printed to file.				
Туре	Modal Dialog				
Open Focus	File name				
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name 				
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
	Allows the user to change the display properties of the folder/file grid.	PortalSettings.Images.GroupsListing.ReportSettings. General.SaveTo.Lookup.Views	

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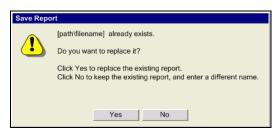
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_imag e groups.txt	Υ	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera I.SaveTo.Lookup.Fil eName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera I.SaveTo.Lookup.Gri d	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera I.SaveTo.Lookup.Sa veAsType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Imag es.GroupsListing.Re portSettings.Genera I.SaveTo.Lookup.Sa veIn	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Groups" to ".GroupsListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.67. Portal Settings – Images – Groups Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Groups" to ".GroupsListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.68. Portal Settings – Images – Groups Listing – Report Settings – General – Save Report Success [Ph3]



General	Description
HelpID	PortalSettings.Images.GroupsListing.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.Images.GroupsListing.ReportSettings. General.SaveReportSuccess.OK	

Special Rules and Clarifications				
1. None.				

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.01	03/03/2002	TAF	Change HELPID from ".Groups" to ".GroupsListing"		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

9.69. Portal Settings – Image Group Properties [Ph2]



General	Description	
HelpID	Portal.Image GroupProperties	
Title	Image Group Properties for [description]where [description] is the image group description.	
Usage	Defines image group properties.	
Туре	Standard DE form	
Open Focus	Code	
Tab Order	 Set as Default Description Delete Save Close Code 	
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group 10.5.4 Manage Image Settings – Deleting Existing Image Group	
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.	

Buttons	Function / Action	HelpID	
Close	Closes the window. Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).	Portal.Image GroupProperties.Close	
Delete	Deletes the image group.	Portal.Image GroupProperties.Delete	
Save	Saves the image group record. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Close.	Portal.Image GroupProperties.Save	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the image group.	Code		Υ		Portal.Image GroupProperties.Co de	

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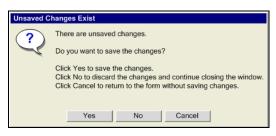
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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Description	This is the description of the image group.	Text		Υ	Υ	Portal.Image GroupProperties.De scription	
Set as Default	This indicates this is the default portal image group.	Checkbox	Unchecked	N	N	Portal.Image GroupProperties.Se tAsDefault	
	If the user checks Set as Default and then saves the record, check to see if an existing default exists for image groups. If one does exist, display a dialog box that gives the user the option of making the active image group the default (Yes), or keeping the current default for image groups (No).						

Special Rules and Clarifications			
1. None			

Rev No.	Rev Date	Rev By	Revision Description	
1.00	02/26/2002	TAF	Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

9.70. Portal Settings – Image Group Properties – Unsaved Changes Exist [Ph2]



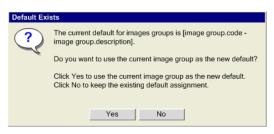
General	Description	
HelpID	Portal.Image GroupProperties.UnsavedChanges	
Title	Unsaved Changes Exist	
Usage	Alerts the user that unsaved changes exist on the Image Group Properties window.	
Туре	Modal Dialog Box	
Open Focus	Yes	
Tab Order	1. No 2. Cancel 3. Yes	
Related Use Cases	10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group	
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.	

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Image Group Properties window without saving or discarding the changes.	Portal.Image GroupProperties.UnsavedChanges.Cancel	
No	Continues closing the Image Group Properties window, and discards any changes that have been made to the Image Group Properties since the last time the settings were saved.	Portal.Image GroupProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Image Group Properties window.	Portal.Image GroupProperties.UnsavedChanges.Yes	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.71. Portal Settings – Image Group Properties – Default Exists [Ph2]



General	Description	
HelpID	Portal.Image.GroupProperties.DefaultExists	
Title	Default Exists	
Usage	Advises the user that a default already exists for image groups, and gives them the option of using the active image group as the new default or keeping the current default assignment.	
Туре	Modal Dialog	
Open Focus	No	
Tab Order	1. Yes 2. No	
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group	
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.	

Buttons	Function / Action	HelpID	Hot Key
No	Terminates making the active/selected image group the default.	Portal.Image.GroupProperties.DefaultExists.No	
	If the dialog box was opened from the Image Group Properties DE form, the Set as Default field in that record is cleared before the record is saved.		
Yes	Makes the active/selected image group the default, clearing the Set as Default field in the current default image group, and populating the Set as Default field in the active/selected image group.	Portal.Image.GroupProperties.DefaultExists.Yes.	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.72. Portal Settings – Image Group Properties – Delete Confirmation [Ph2]



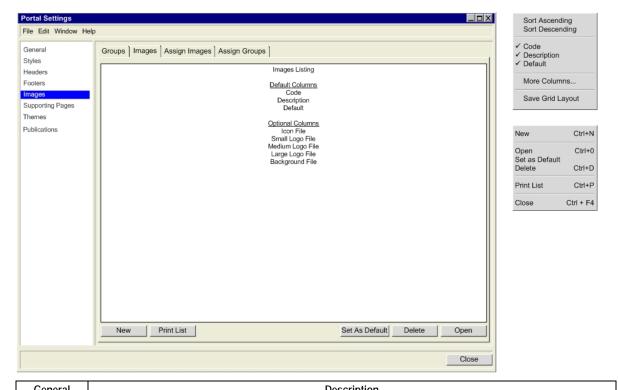
General	Description	
HelpID	Portal.Image GroupProperties.DeleteConfirmation	
Title	Delete Confirmation	
Usage	Allows the user to either continue deleting the image group (Yes), or terminate deleting the image group (No).	
Туре	Modal Dialog	
Open Focus	No	
Tab Order	1. Yes 2. No	
Related Use Cases	10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group 10.5.4 Manage Image Settings – Deleting Existing Image Group	
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.	

Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the image group, and returns the user to the window from which the dialog box was opened.	Portal.Image GroupProperties.DeleteConfirmation.No	
Yes	Continues deleting the image group, and returns the user to the Image Groups listing.	Portal.Image GroupProperties.DeleteConfirmation.Yes.	

Special Rules and Clarifications		
1. None.		

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.73. Portal Settings – Images – Images Listing [Ph2]



General	Description				
HelpID	PortalSettings.Images				
Title	Portal Settings → Images → Images				
Usage	Displays a list of images that are available for use on portals.				
Туре	Listing				
Open Focus	Grid				
Tab Order	 New Print List Delete Set as Default Open Close Grid 				
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.				

Buttons	Function / Action	HelpID	Hot Key				
Close	See 9.1 Portal Settings – General for details on the functionality of the Close button.						
Delete	Deletes the selected image, but first displays a dialog box which gives the user the option of proceeding with deleting the image or keeping it.	PortalSettings.Images.Delete					
New	Opens a blank Image Properties DE form so the user can create a new image.	PortalSettings.Images.New					
Open	Opens the Image Properties DE form of the selected image.	PortalSettings.Images.Open					
Print List	Prints the list of images to a file or printer.	PortalSettings.Images.PrintList					
Set as Default	Sets the selected image as the default image for portals.	PortalSettings.Images.SetasDefault					
	There can be only one default image selected.						
	When the user clicks Set as Default , check to see if an existing default exists for images. If one does exist, display a dialog box that gives the user the option of making the selected image the default (Yes), or keeping the current default for images (No).						

Column Heading	Definition	HelpID	Hot Key
Background File	This is the file for the background version of the image.	PortalSettings.Imag es.ImagesListing.Ba ckground	
Code	This is the code for the image.	PortalSettings.Imag es.ImagesListing.Co de	
Default	This field, when populated, indicates the image is the default for portals.	PortalSettings.Imag es.ImagesListing.De fault	
Description	This is the description of the image.	PortalSettings.Imag es.ImagesListing.De scription	
Icon File	This is the file for the icon version of the image.	PortalSettings.Imag es.ImagesListing.Ico n	
Large Logo File	This is the file for the large logo version of the image.	PortalSettings.Imag es.ImagesListing.La rgeLogo	
Medium Logo File	This is the file for the medium logo version of the image.	PortalSettings.Imag es.ImagesListing.M ediumLogo	
Small Logo File	This is the file for the small logo version of the image.	PortalSettings.Imag es.ImagesListing.S mallLogo	

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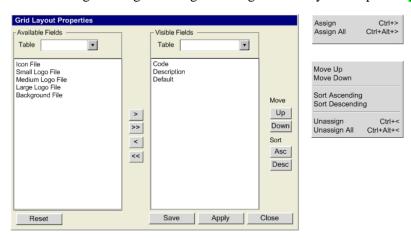
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Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- The grid includes a shortcut menu for the records listing, allowing the user to create a new image, open, copy, set as default or delete an existing image that has been selected; print the list of images, or close the window.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.
1.02	03/03/2002	TAF	Change HELPID from ".Images" to ".ImagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.74. Portal Settings – Images – Images Listing – Grid Layout Properties [Ph2]



General	Description
HelpID	PortalSettings.Images.ImagesListing.GridLayoutProperties
Title	Grid Layout Properties
Usage	Defines the grid layout properties for the Images listing, including visible fields, column order, and sort order.
Туре	Modal Dialog
Open Focus	Available Fields – Table
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table
Related Use Cases	10.5.5 Manage Image Settings – List Images
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.Apply	

Buttons	Function / Action	HelpID	
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.Assign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.Images.ImagesListing.GridLayoutProperties.AssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.Close	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.MoveDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.Reset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.Save	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.Images.ImagesListing.GridLayoutProperties.SortAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.SortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.Images.ImagesListing.GridLayoutProperties.Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.Images.ImagesListing.GridLayoutProp erties.UnassignAll	

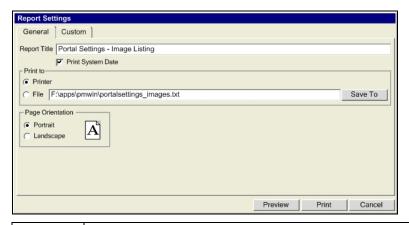
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.		Filtered by selection in Table field	n/a		PortalSettings.Imag es.ImagesListing.Gri dLayoutProperties.A vailableFields	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.lmag es.lmagesListing.Gri dLayoutProperties.A vailableFields.Table	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing						
Visible Fields	These are the fields that are visible on the grid. The fields appear from left to right in the same order they are listed from top to bottom.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Imag es.ImagesListing.Gri dLayoutProperties.V isibleFields	
	The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.						
Visible Fields – Table	This is the table from which the list of Visible Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Imag es.ImagesListing.Gri dLayoutProperties.V	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing					isibleFields.Table	

Special Rules and Clarifications 17. Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.01	03/03/2002	TAF	Change HELPID from ".lmages" to ".lmagesListing"		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

9.75. Portal Settings – Images – Images Listing – Report Settings – General [Ph3]



General	Description
HelpID	PortalSettings.Images.ImagesListing.ReportSettings.General
Title	Report Settings → General
Usage	Sets general parameters for printing the Images listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Report Title
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close
Related Use Cases	10.5.5 Manage Image Settings – List Images
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.Images.ImagesListing.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.Images.ImagesListing.ReportSettings. Preview	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.Images.ImagesListing.ReportSettings. Print	

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Buttons	Function / Action	HelpID	Hot Key
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

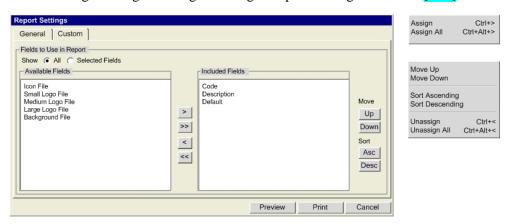
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Y	Option 1 of 2	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera IPageOrientation.La ndscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Y	Option 1 of 2	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera IPageOrientation.Po rtrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera IPrintSystemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera IPrintto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_images.txt	Υ	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera IPrintto.File(path/file name)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera IPrintto.Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Images Listing"	N	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera IReportTitle	

Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- When the report has been saved to the file, a dialog box appears advising the user of this.
- After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Images" to ".ImagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.76. Portal Settings – Images – Images Listing – Report Settings – Custom [Ph3]



General	Description
HelpID	PortalSettings.Images.ImagesListing.ReportSettings.Custom
Title	Report Settings \rightarrow Custom
Usage	Sets custom parameters for printing the Images listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Show – All
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All
Related Use Cases	10.5.5 Manage Image Settings – List Images
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key	
Assign (>)	ů .	PortalSettings.Images.ImagesListing.ReportSettings. Custom.Assign		

Buttons	Function / Action	HelpID	Hot Key
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.Images.ImagesListing.ReportSettings.Custom.AssignAll	
Cancel	The functionality of this button defined with General Report Settings.	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.Images.ImagesListing.ReportSettings. Custom.MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.Images.ImagesListing.ReportSettings. Custom.MoveUp	
Preview	The functionality of this button defined with General Report Settings.	n/a	
Print	The functionality of this button defined with General Report Settings .	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.Images.ImagesListing.ReportSettings. Custom.SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.Images.ImagesListing.ReportSettings.Custom.SortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.Images.ImagesListing.ReportSettings. Custom.Unassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.Images.ImagesListing.ReportSettings. Custom.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Custom .AvailableFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Custom .IncludedFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Y	Option 1 of 2	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Custom .Show.All	

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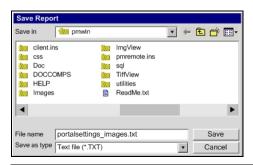
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	Only shows fields that appear on the Images Listing.	Option – In a set with All	N	Option 1 of 2		PortalSettings.Imag es.ImagesListing.Re portSettings.Custom .Show.Selected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.02	03/03/2002	TAF	Change HELPID from ".Images" to ".ImagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.77. Portal Settings – Images – Images Listing – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	PortalSettings.Images.ImagesListing.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.5.5 Manage Image Settings – List Images
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
	Allows the user to change the display properties of the folder/file grid.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Lookup.Views	

Last Updated: 07/15/2003

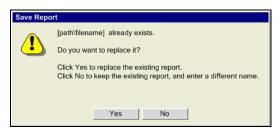
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_imag es.txt	Υ	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera I.SaveTo.Lookup.Fil eName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera I.SaveTo.Lookup.Gri d	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera I.SaveTo.Lookup.Sa veAsType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Imag es.ImagesListing.Re portSettings.Genera I.SaveTo.Lookup.Sa veIn	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.02	03/03/2002	TAF	Change HELPID from ".lmages" to ".lmagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.78. Portal Settings – Images – Images Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.Images.ImagesListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.5.5 Manage Image Settings – List Images
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.Images.ImagesListing.ReportSettings. General.SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Images" to ".ImagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Images – Images Listing – Report Settings – General – Save Report Success [Ph3] 9.79.



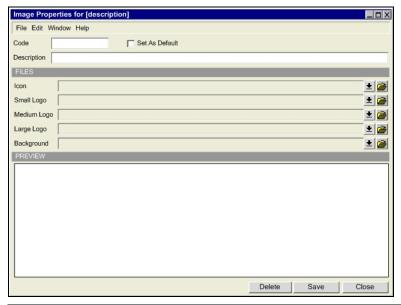
General	Description
HelpID	PortalSettings.Images.ImagesListing.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.5.5 Manage Image Settings – List Images
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.Images.ImagesListing.ReportSettings. General.SaveReportSuccess.OK	

Spe	cial Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Images" to ".ImagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.80. Portal Settings – Image Properties [Ph2]



General	Description
HelpID	Portal.ImageProperties
Title	Image Properties for [description]where [description] is the image description.
Usage	Defines image properties.
Туре	Standard DE form
Open Focus	Code
Tab Order	 Set as Default Description Icon – Lookup Icon – Open Small Logo – Lookup Small Logo – Open Medium Logo – Lookup Medium Logo – Open Large Logo – Cookup Large Logo – Open Background – Lookup Background – Open Delete Save Close Code
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image

General	Description
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Background – Lookup	Displays the Find File dialog box, allowing the user to locate the background version of the image, returning the results to the read-only Background field.	Portal.ImageProperties.Background.Lookup	
Background – Open	Opens the background in the default image editor corresponding to the file extension. If the file name and/or location is changed as part of editing the image, that information must be returned to the read-only Background field.	Portal.ImageProperties.Background.Open	
Close	Closes the window. Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).	Portal.ImageProperties.Close	
Delete	Deletes the image.	Portal.ImageProperties.Delete	
Icon – Lookup	Displays the Find File dialog box, allowing the user to locate the icon version of the image, returning the results to the read-only Icon field.	Portal.ImageProperties.Icon.Lookup	
Icon – Open	Opens the icon in the default image editor corresponding to the file extension. If the file name and/or location is changed as part of editing the image, that information must be returned to the read-only Icon field.	Portal.ImageProperties.lcon.Open	
Large Logo – Lookup	Displays the Find File dialog box, allowing the user to locate the icon version of the image, returning the results to the read-only Large Logo field.	Portal.ImageProperties.LargeLogo.Lookup	
Large Logo – Open	Opens the large logo in the default image editor corresponding to the file extension. If the file name and/or location is changed as part of editing the image, that information must be returned to the read-only Large Logo field.	Portal.ImageProperties.LargeLogo.Open	
Medium Logo – Lookup	Displays the Find File dialog box, allowing the user to locate the icon version of the image, returning the results to the read-only Medium Logo field.	Portal.ImageProperties.MediumLogo.Lookup	
Medium Logo – Open	Opens the medium logo in the default image editor corresponding to the file extension. If the file name and/or location is changed as part of editing the image, that information must be returned to the read-only Medium Logo field.	Portal.ImageProperties.MediumLogo.Open	

Buttons	Function / Action	HelpID	Hot Key
Save	Saves the image record. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Close.	Portal.ImageProperties.Save	
Small Logo – Lookup	Displays the Find File dialog box, allowing the user to locate the icon version of the image, returning the results to the read-only Small Logo field.	Portal.ImageProperties.SmallLogo.Lookup	
Small Logo – Open	Opens the small logo in the default image editor corresponding to the file extension. If the file name and/or location is changed as part of editing the image, that information must be returned to the read-only Small Logo field.	Portal.ImageProperties.SmallLogo.Open	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Background	This is the background version of the image.	Read-only Text		N	N	Portal.ImagePropert ies.Background	
Code	This is the code for the image.	Code		Υ	Υ	Portal.ImagePropert ies.Code	
Description	This is the description of the image.	Text		Υ	Υ	Portal.ImagePropert ies.Description	
Icon	This is the icon version of the image.	Read-only Text		N	N	Portal.ImagePropert ies.Icon	
Large Logo	This is the large logo version of the image.	Read-only Text		N	N	Portal.ImagePropert ies.LargeLogo	
Medium Logo	This is the medium logo version of the image.	Read-only Text		N	N	Portal.ImagePropert ies.MediumLogo	
Preview	This is a preview window that allows the user to see the image (icon, small logo, medium logo, large logo, or background) without actually opening it,	Image Viewer – should support the same image viewing capabilities as IE6		n/a	n/a	Portal.ImagePropert ies.Preview	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Set as Default	This indicates this is the default portal image.	Checkbox	Unchecked	N	N	Portal.ImagePropert ies.SetAsDefault	
	If the user checks Set as Default and then saves the record, check to see if an existing default exists for images. If one does exist, display a dialog box that gives the user the option of making the active image the default (Yes), or keeping the current default for images (No).						
Small Logo	This is the small logo version of the image.	Read-only Text		N	N	Portal.ImagePropert ies.SmallLogo	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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9.81. Portal Settings – Image Properties – Find File [Ph2]



General	Description
HelpID	Portal.ImageProperties.FindFile
Title	Find File
Usage	Allows the user to select the file for one of the image fields (icon, small logo, medium logo, large logo or background)
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Files of type Select Cancel Look in Toolbar Grid File name
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	Portal.ImageProperties.FindFile.Back	
Cancel	Closes the Find File window without changing the value in the selected image file field.	Portal.ImageProperties.FindFile.Cancel	
New Folder	Creates a new folder within the current Look in folder, and then changes to that new folder as the Look in location.	Portal.ImageProperties.FindFile.NewFolder	
Select	Populates the selected image file field with the values from the Look in and File name fields in a path/file construction.	Portal.ImageProperties.FindFile.Save	

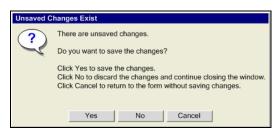
Buttons	Function / Action	HelpID	Hot Key
	Moves to the parent folder of the folder currently populating the Look in field.	Portal.ImageProperties.FindFile.Up	
Views	Allows the user to change the display properties of the folder/file grid.	Portal.ImageProperties.FindFile.Views	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the image file.	Text		Υ	n/a	Portal.ImagePropert ies.FindFile.FileNam e	
Folder/File Grid	This is a list of the contents of the Look in folder, with files filtered by the value in the Files of type field.	Grid		Y	n/a	Portal.ImagePropert ies.FindFile.Grid	
Files of type	This is the file format of the image to find.	Drop-down List: applicable image file types.	All Pictures	Υ	n/a	Portal.ImagePropert ies.FindFile.FilesOf Type	
Look in	This is the folder in which the image file the user wants to use is located.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	Portal.ImagePropert ies.FindFile.LookIn	

Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.82. Portal Settings – Image Properties – Unsaved Changes Exist [Ph2]



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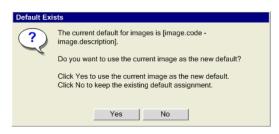
General	Description
HelpID	Portal.ImageProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on the Image Properties window.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Cancel 3. Yes
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Image Properties window without saving or discarding the changes.	Portal.ImageProperties.UnsavedChanges.Cancel	
No	Continues closing the Image Properties window, and discards any changes that have been made to the Image Properties since the last time the settings were saved.	Portal.ImageProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Image Properties window.	Portal.ImageProperties.UnsavedChanges.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.83. Portal Settings – Image Properties – Default Exists [Ph2]



General	Description
HelpID	Portal.ImageProperties.DefaultExists
Title	Default Exists
Usage	Advises the user that a default already exists for images, and gives them the option of using the active image as the new default or keeping the current default assignment.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates making the active/selected image the default.	Portal.ImageProperties.DefaultExists.No	
	If the dialog box was opened from the Image Properties DE form, the Set as Default field in that record is cleared before the record is saved.		
Yes	Makes the active/selected image the default, clearing the Set as Default field in the current default image, and populating the Set as Default field in the active/selected image.	Portal.ImageProperties.DefaultExists.Yes.	

Special Rules and Clarifications
1. None.

Rev No.	Rev Date	Rev By	Revision Description				
1.00	02/26/2002	TAF	Original Mockup				
1.10	03/18/2002	TAF	Final mockup for development review and coding.				

9.84. Portal Settings – Image Properties – Delete Confirmation [Ph2]



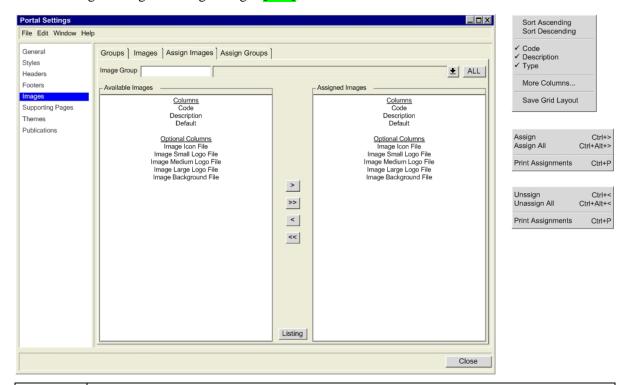
General	Description
HelpID	Portal.ImageProperties.DeleteConfirmation
Title	Delete Confirmation
Usage	Allows the user to either continue deleting the image (Yes), or terminate deleting the image (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the image, and returns the user to the window from which the dialog box was opened.	Portal.ImageProperties.DeleteConfirmation.No	
Yes	Continues deleting the image, and returns the user to the Images listing.	Portal.ImageProperties.DeleteConfirmation.Yes.	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description				
1.00	02/26/2002	TAF	Original Mockup				
1.10	03/18/2002	TAF	Final mockup for development review and coding.				

9.85. Portal Settings – Images – Assign Images [Ph2]



General	Description
HelpID	PortalSettings.Images.AssignImages
Title	Portal Settings \rightarrow Images \rightarrow Assign Images
Usage	Assigns existing images to existing image groups by selecting one or more groups, and then assigning the images to those groups.
Туре	2-panel Assignment
Open Focus	Image Group (code)
Tab Order	 Image Group (lookup) Image Group - All Available Images Assign (>) Assigned Images Unassign (<) Unassign All (<<) Listing Close Image Group (code)
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments

General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add listing and printing.

Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Assigns the selected Available Images to the selected image groups.	PortalSettings.Images.AssignImages.Assign	
Assign All (>>)	Assigns all Available Images to the selected image groups.	PortalSettings.Images.AssignImages.AssignAll	
Close	See 9.1 Portal Settings – General for details on the fur	nctionality of the Close button.	
Image Group – All	Makes the assignment to all image groups.	PortalSettings.Images.AssignImages.ImageGroup.All	
Image Group – Lookup	Displays the Select Portal Image Groups window, allowing the user to select one or more image groups to make the assignment to.	PortalSettings.Images.AssignImages.ImageGroup.Lo okup	
Listing	Displays a listing of exisiting assignments.	PortalSettings.Images.AssignImages.Listing	
Unassign (<)	Removes the selected Assigned Images from the image groups.	PortalSettings.Images.AssignImages.Unassign	
Unassign All (<<)	Removes all Assigned Images from the image groups.	PortalSettings.Images.AssignImages.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Assigned Images	These are the images assigned to the selected image groups.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Imag es.AssignImages.As signedImages	
Available Images	These are the images that are currently not assigned to the selected image groups.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Imag es.AssignImages.Av ailableImages	
Image Group	These are the image groups to which the assignment is being made.	Code – Search on Image Groups by Code. Description – Read- only text field.		Υ		PortalSettings.lmag es.AssignImages.lm ageGroup	

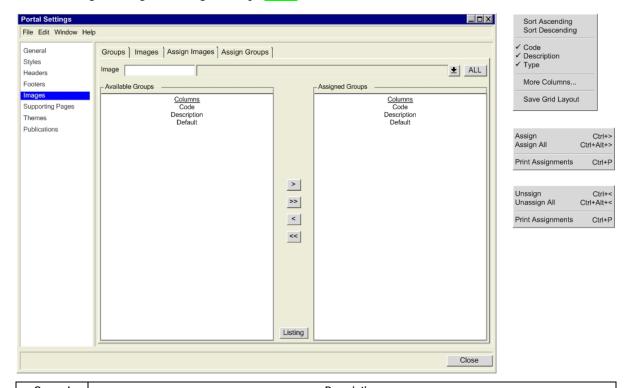
Special Rules and Clarifications

- 1. Both Available Images and Assigned Images listings should support multi-select, quick filtering, and drag'n'drop.
- 2. The Image Group field should accept multiple values, separated by a slash ("/").

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup

Rev No.	Rev Date	Rev By	Revision Description	
1.01	03/02/2002		Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

9.86. Portal Settings – Images – Assign Groups [Ph2]



General	Description		
HelpID	PortalSettings.Images.AssignGroups		
Title	Portal Settings \rightarrow Images \rightarrow Assign Groups		
Usage	Assigns existing images to existing image groups by selecting one or more images, and then assigning the groups to those images.		
Туре	2-panel Assignment		
Open Focus	Image (code)		
Tab Order	 Image (lookup) Image - All Available Groups Assign (>) Assigned Groups Unassign (<) Unassign All (<<) Listing Close Image (code) 		
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments		

General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add listing and printing.

Buttons	Function / Action HelpID		Hot Key	
Assign (>)	Assigns the selected Available Groups to the selected images.	PortalSettings.Images.AssignGroups.Assign		
Assign All (>>)	Assigns all Available Groups to the selected images. PortalSettings.Images.AssignGroups.AssignAll			
Close	See 9.1 Portal Settings – General for details on the functionality of the Close button.			
Image Group – All	o – Makes the assignment to all images. PortalSettings.Images.AssignGroups.ImageGroup.All			
Image Group – Lookup	Displays the Select Portal Images window, allowing the user to select one or more images to make the assignment to. PortalSettings.Images.AssignGroups.ImageGroup.Lo okup			
Listing	Displays a listing of exisiting assignments.	of exisiting assignments. PortalSettings.Images.AssignGroups.Listing		
Unassign (<)	Removes the selected Assigned Groups from the images.	Assigned Groups from the PortalSettings.Images.AssignGroups.Unassign		
Unassign All (<<)	Removes all Assigned Groups from the images. PortalSettings.Images.AssignGroups.UnassignAll			

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
	These are the image groups that are currently not assigned to the selected images.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Imag es.AssignGroups.Av ailableGroups	
Assign Groups	These are the image groups assigned to the selected images.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Imag es.AssignGroups.As signGroups	
Image	These are the images to which the assignment is being made.	Code – Search on Images by Code. Description – Read- only text field.		Υ		PortalSettings.Imag es.AssignGroups.Im age	

Special Rules and Clarifications

- Both Available Groups and Assigned Groups listings should support multi-select, quick filtering, and drag'n'drop.
- The Image field should accept multiple values, separate by a slash ("/").

Rev No.	Rev Date	Rev By	Revision Description	
1.00	02/26/2002	TAF	Original Mockup	
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

9.87. Portal Settings – Images – Image Group Assignments Listing [Ph3]



General	Description		
HelpID	PortalSettings.Images.AssignmentsListing		
Title	Portal Settings → Image Group Assignment Listing		
Usage	Displays a list of image assignments to groups.		
Туре	Modal Listing		
Open Focus	Grid		
Tab Order	 Print List Unassigned Filter Close Grid 		
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments		
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.		

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the window.	PortalSettings.Images.AssignmentsListing.Close	
Filter	Displays the Filter Listing window.	PortalSettings.Images.AssignmentsListing.Filter	
Print List	Prints the list of assignments to a file or printer.	PortalSettings.Images.AssignmentsListing.PrintList	
Unassign	Removes the selected assignments.	PortalSettings.Images.AssignmentsListing.Unassign	

Column Heading	Definition	HelpID	Hot Key
Background File	This is the file for the background version of the image in the assignment.	PortalSettings.Imag es.AssignmentsListi ng.BackgroundFile	
Group Code	This is the code of the image group in the assignment.	PortalSettings.Imag es.AssignmentsListi ng.GroupCode	
Group Default	This indicates the image group in the assignment is the default image group.	PortalSettings.Imag es.AssignmentsListi ng.GroupDefault	
Group Description	This is the description of the image group in the assignment. PortalSet es.Assign ng.Group n		
Icon File	This is the file for the icon version of the image in the assignment. PortalSettings.li es.Assignments ng.lconFile		
Image Code	This is the code of the image in the assignment. PortalSettings es.Assignmen ng.ImageCode		
Image Default	This indicates the image in the assignment is the default image. PortalSettings.Im es.AssignmentsL ng.ImageDefault		
Image Description	ription This is the description of the image in the assignment. PortalSettings.In es.Assignmentsling.ImageDescription.		
Large Logo File	This is the file for the large logo version of the image in the assignment. PortalSettings.Im. es.AssignmentsLing.LargeLogoFile		
Medium Logo File	This is the file for the medium logo version of the image in the assignment. PortalSettings.Images.AssignmentsLing.MediumLogoFi		
Small Logo File	This is the file for the small logo version of the image in the assignment. PortalSetting es.Assignmeng.SmallLog		

Special Rules and Clarifications

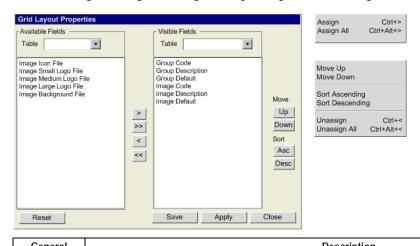
- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- 2. The grid includes a shortcut menu for the records listing, allowing the user to unassign, filter or print the listing, or close the window.

Rev No.	Rev Date	Rev By	Revision Description	
1.00	02/26/2002	TAF	Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

Printed: 06/12/2018

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9.88. Portal Settings – Images – Image Group Assignments Listing – Grid Layout Properties [Ph3]



General	Description
HelpID	PortalSettings.Images.AssignmentsListing.GridLayoutProperties
Title	Grid Layout Properties
Usage	Defines the grid layout properties for the Image Group Assignments listing, including visible fields, column order, and sort order.
Туре	Modal Dialog
Open Focus	Available Fields – Table
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.Apply	
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.Assign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.AssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.Close	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.MoveDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.Reset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.Save	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.SortAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.SortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.Images.AssignmentsListing.GridLayou tProperties.UnassignAll	

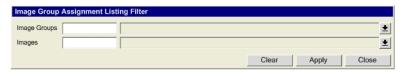
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.	•	Filtered by selection in Table field	n/a		PortalSettings.Imag es.AssignmentsListi ng.GridLayoutPrope rties.AvailableFields	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Imag es.AssignmentsListi ng.GridLayoutPrope rties.AvailableFields	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing					.Table	
Visible Fields	These are the fields that are visible on the grid. The fields appear from	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Imag es.AssignmentsListi ng.GridLayoutPrope rties.VisibleFields	
	left to right in the same order they are listed from top to bottom.						
	The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.						
Visible Fields – Table	This is the table from which the list of Visible Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Imag es.AssignmentsListi ng.GridLayoutPrope	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing					rties.VisibleFields.T able	

Special Rules and Clarifications 1. Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Images – Image Group Assignments – Filter [Ph3] 9.89.



General	Description
HelpID	PortalSettings.Images.AssignmentsListing.Filter
Title	Image Group Assignment Listing Filter
Usage	Allows the user to select one or more groups and one or more images on which to filter the Image Group Assignment Listing .
Туре	Modal Dialog
Open Focus	Image Groups – Code
Tab Order	 Image Groups – Lookup Images – Code Images – Lookup Clear Apply Close Image Groups – Code
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Image Groups – Lookup	Displays the Select Portal Image Groups window from which the user can select one or more image groups to use for filtering the listing.	PortalSettings.Images.AssignmentsListing.Filter.Imag eGroups.Lookup	
Images – Lookup	Displays the Select Portal Images window from which the user can select one or more images to use for filtering the listing.	PortalSettings.Images.AssignmentsListing.Filter.Imag es.Lookup	
Clear	Closes the window and removes the filter criteria from the listing.	PortalSettings.Images.AssignmentsListing.Filter.Clea r	
Apply	Closes the window and applies the filter criteria to the listing.	PortalSettings.Images.AssignmentsListing.Filter.Appl y	
Close	Closes the window without changing the state of the listing.	PortalSettings.Images.AssignmentsListing.Filter.Clos e	

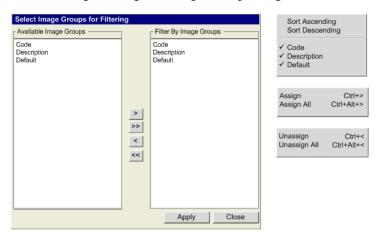
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Image Groups	These are the image groups on which the listing is filtered.	Code – Searches for image groups based on code.		N	n/a	PortalSettings.Imag es.AssignmentsListi ng.Filter.ImageGrou	
	If more than one image group is selected, each image group appears in these fields with a slash ("/") between each entry.					ps	
Images	These are the images on which the listing is filtered. If more than one image is selected, each image appears in	Code – Searches for image groups based on code. Description – Read- only text.		N	n/a	PortalSettings.Imag es.AssignmentsListi ng.Filter.Images	
	these fields with a slash ("/") between each entry.						

Special Rules and Clarifications	
1. None	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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9.90. Portal Settings – Images – Image Group Assignments – Filter – Select Groups [Ph3]



General	Description
HelpID	PortalSettings.Images.AssignmentsListing.Filter.SelectImageGroups
Title	Select Portal Image Groups for Filtering
Usage	Allows the user to select one or more image groups on which to filter the Image Group Assignment Listing.
Туре	Modal Dialog
Open Focus	Available Image Groups
Tab Order	 Assign (>) Assign All (>>) Filter By Image Groups Unassign (<) Unassign All (<<) Apply Close Available Image Groups
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Select Portal Image Groups for Filtering window, and populates the Images Groups field on the filter window with the selected groups.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImageGroups.Apply	
Assign (>)	Makes the selected Available Image Groups part of the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImageGroups.Assign	
Assign All (>>)	Makes all Available Image Groups part of the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImageGroups.AssignAll	

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Select Portal Image Groups for Filtering window.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctlmageGroups.Close	
Unassign (<)	Removes the selected Filter By Image Groups from the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImageGroups.Unassign	
Unassign All (<<)	Removes all Filter By Image Groups from the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImageGroups.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Image Groups	This is the list of image groups that are not part of the Image Group Assignment Listing Filter, but are available for use.	Assignment Panel Listing	All image groups not in the filter	n/a	n/a	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag eGroups.Available	
Filter By Image Groups	This is the list of image groups that are part of the Image Group Assignment Listing Filter.	Assignment Panel Listing	All image groups in the filter	n/a	n/a	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag eGroups.FilterBy	

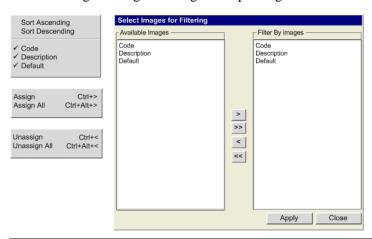
Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the image group.	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag eGroups.Code	
Description	This is the description of the image group.	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag eGroups.Description	
Default	This indicates the image group is the default image group.	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag eGroups.Default	

Special Rules and Clarifications

Both Available Image Groups and Filter By Image Groups listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

9.91. Portal Settings – Images – Image Group Assignments – Filter – Select Portal Images [Ph3]



General	Description
HelpID	PortalSettings.Images.AssignmentsListing.Filter.SelectImages
Title	Select Portal Images for Filtering
Usage	Allows the user to select one or more images on which to filter the Image Group Assignment Listing.
Туре	Modal Dialog
Open Focus	Available Images
Tab Order	 Assign (>) Assign All (>>) Filter By Images Unassign (<) Unassign All (<<) Apply Close Available Images
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Select Portal Images for Filtering window, and populates the Images field on the filter window with the selected images.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImages.Apply	
Assign (>)	Makes the selected Available Images part of the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImages.Assign	
Assign All (>>)	Makes all Available Images part of the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImages.AssignAll	

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Select Portal Images for Filtering window.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImages.Close	
Unassign (<)	Removes the selected Filter By Images from the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImages.Unassign	
Unassign All (<<)	Removes all Filter By Images from the listing filter.	PortalSettings.Images.AssignmentsListing.Filter.Sele ctImages.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Images	This is the list of images that are not part of the Image Group Assignment Listing Filter, but are available for use.	Assignment Panel Listing	All images not in the filter	n/a	n/a	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag es.Available	
Filter By Images	This is the list of images that are part of the Image Group Assignment Listing Filter.	Assignment Panel Listing	All images in the filter	n/a	n/a	PortalSettings.lmag es.AssignmentsListi ng.Filter.SelectImag es.FilterBy	

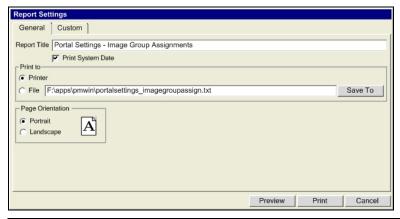
Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the image.	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag es.Code	
Description	This is the description of the image.	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag es.Description	
Default	This indicates the image is the default image.	PortalSettings.Imag es.AssignmentsListi ng.Filter.SelectImag es.Default	

Special Rules and Clarifications Both Available Images and Filter By Images listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	02/26/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

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9.92. Portal Settings – Image Group Assignments – Report Settings – General [Ph3]



General	Description				
HelpID	PortalSettings.ImageGroupAssignments.ReportSettings.General				
Title	Report Settings → General				
Usage	Sets general parameters for printing the Image Group Assignment Listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.				
Туре	Modal Dialog				
Open Focus	Report Title				
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close 				
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.ImageGroupAssignments.ReportSettings.Cancel	
Preview		PortalSettings.ImageGroupAssignments.ReportSettings.Preview	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.ImageGroupAssignments.ReportSettings.Print	

Buttons	Function / Action	HelpID	Hot Key
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.	PortalSettings.ImageGroupAssignments.ReportSettings.General.SaveTo	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Y	Option 1 of 2	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eralPageOrientation .Landscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Y	Option 1 of 2	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eralPageOrientation .Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eralPrintSystemDat e	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eralPrintto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_imagegroupassi gn.txt	Υ	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eralPrintto.File(path/ filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Y	Option 1 of 2	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eralPrintto.Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Image Group Assignments"	N	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eralReportTitle	

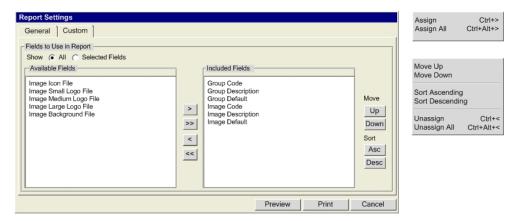
Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- When the report has been saved to the file, a dialog box appears advising the user of this.
- After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

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Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.93. Portal Settings – Image Group Assignments – Report Settings – Custom [Ph3]



General	Description
HelpID	PortalSettings.ImageGroupAssignments.ReportSettings.Custom
Title	Report Settings → Custom
Usage	Sets custom parameters for printing the Image Group Assignment Listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Show – All
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
0	Assigns the selected Available Fields , including them in the report.	PortalSettings.ImageGroupAssignments.ReportSettings.Custom.Assign	

Buttons	Function / Action	HelpID	Hot Key
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.ImageGroupAssignments.ReportSettin gs.Custom.AssignAll	
Cancel	The functionality of this button defined with General Report Settings.	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.ImageGroupAssignments.ReportSettings.Custom.MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.ImageGroupAssignments.ReportSettings.Custom.MoveUp	
Preview	The functionality of this button defined with General Report Settings.	n/a	
Print	The functionality of this button defined with General Report Settings.	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.ImageGroupAssignments.ReportSettings.Custom.SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.ImageGroupAssignments.ReportSettings.Custom.SortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.ImageGroupAssignments.ReportSettin gs.Custom.Unassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.ImageGroupAssignments.ReportSettings.Custom.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Cus tom.AvailableFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Cus tom.IncludedFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Υ	Option 1 of 2	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Cus tom.Show.All	

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Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	Only shows fields that appear on the Images Listing.	Option – In a set with All	N	Option 1 of 2		PortalSettings.Imag eGroupAssignments .ReportSettings.Cus tom.Show.Selected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

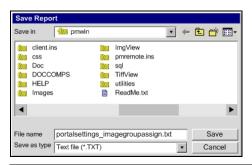
Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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9.94. Portal Settings – Image Group Assignments – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	PortalSettings.ImageGroupAssignments.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.ImageGroupAssignments.ReportSettings.General.SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.ImageGroupAssignments.ReportSettings.General.SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.ImageGroupAssignments.ReportSettings.General.SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.ImageGroupAssignments.ReportSettings.General.SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.ImageGroupAssignments.ReportSettin gs.General.SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
		PortalSettings.ImageGroupAssignments.ReportSettings.General.SaveTo.Lookup.Views	

Last Updated: 07/15/2003

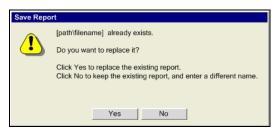
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_imag egroupassign.txt	Υ	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eral.SaveTo.Lookup .FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eral.SaveTo.Lookup .Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eral.SaveTo.Lookup .SaveAsType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Imag eGroupAssignments .ReportSettings.Gen eral.SaveTo.Lookup .SaveIn	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.95. Portal Settings – Image Group Assignments – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.ReportSettings.General.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.ReportSettings.General.SaveTo.Warning.Yes	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Portal Settings – Image Group Assignments – Report Settings – General – Save Report Success [Ph3] 9.96.



General	Description
HelpID	PortalSettings.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.ReportSettings.General.SaveReportSuccess.OK	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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Portal Settings – Image Properties – Unassign Confirmation [Ph3] 9.97.



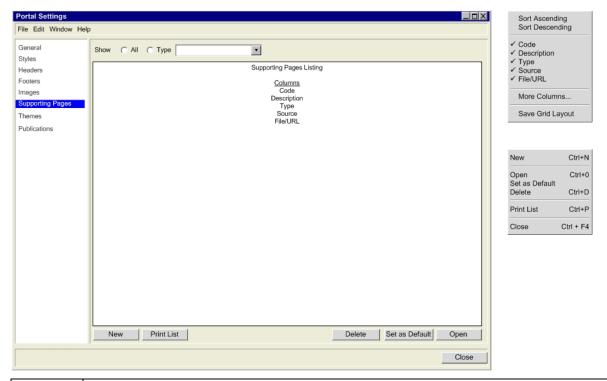
General	Description
HelpID	Portal.ImageProperties.UnassignConfirmation
Title	Unassign Confirmation
Usage	Allows the user to either continue removing the assignment (Yes), or terminate removing the assignment (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.9 Manage Image Settings – Assign Images to Image Groups 10.5.10 Manage Image Settings – List Image Assignments
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates removing the assignment, and returns the user to the Image Group Assignment Listing window.	Portal.ImageProperties.UnassignConfirmation.No	
Yes	Continues deleting the image, and returns the user to the Image Group Assignment Listing window.	Portal.ImageProperties.UnassignConfirmation.Yes.	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.98. Portal Settings – Supporting Pages Listing [Ph2]



General	Description				
HelpID	PortalSettings.SuppPagesListing				
Title	Portal Settings → Supporting Pages				
Usage	Displays a list of supporting pages that are available for use on portals.				
Туре	Listing				
Open Focus	Show – All				
Tab Order	 Show – Type Show – Type (lookup) Grid New Print List Delete Set as Default Open Close Show – All 				
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.6 Manage Supporting Pages Use Cases 10.6.1 Manage Supporting Pages – List Supporting Pages 10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 10.6.4 Manage Supporting Pages – Deleting Existing Supporting Page				

General	Description
Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

Buttons	Function / Action	HelpID	Hot Key		
Close	See 9.1 Portal Settings – General for details on the functionality of the Close button.				
Delete	Deletes the selected supporting page, but first displays a dialog box which gives the user the option of proceeding with deleting the supporting page or keeping it.	PortalSettings.SuppPagesListing.Delete			
New	Opens a blank Supporting Page Properties DE form so the user can create a new supporting page.				
Open	Opens the Supporting Page Properties DE form of the selected supporting page.	of PortalSettings.SuppPagesListing.Open			
Print List	Prints the list of supporting pages to a file or printer.	PortalSettings.SuppPagesListing.PrintList			
Set as Default	Sets the selected supporting page as the default supporting page for portals for the supporting page type. There can be only one default supporting page of each type (Contact Information, Copyright Statement, Disclaimer Statement, Help Information and Under	PortalSettings.SuppPagesListing.SetasDefault			
	Construction) selected. When the user clicks Set as Default , check to see if an existing default exists for supporting pages based on the page type. If one does exist, display a dialog box that gives the user the option of making the selected supporting page the default for the page type (Yes), or keeping the current default for the supporting page type (No).				

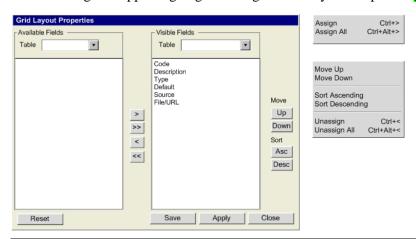
Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the supporting page.	PortalSettings.Supp PagesListing.Code	
Default	This field, when populated, indicates the supporting page is the default for the supporting page type for portals.	PortalSettings.Supp PagesListing.Defaul t	
Description	This is the description of the supporting page.	PortalSettings.Supp PagesListing.Descri ption	
File/URL	This is the source file for the supporting page.	PortalSettings.Supp PagesListing.File	
Source	This is the type of source for the page – file or URL.	PortalSettings.Supp PagesListing.Sourc e	
Туре	This is the type of supporting page.	PortalSettings.Supp PagesListing.Type	

Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- 2. The grid includes a shortcut menu for the records listing, allowing the user to create a new supporting page, open, copy, set as default or delete an existing supporting page that has been selected; print the list of supporting pages, or close the window.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/01/2002	TAF	Change Source File column to File/URL. Added Source column.			
1.02	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.			
1.03	03/03/2002	TAF	Change HELPID from ".SuppPages" to ".SuppPagesListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.99. Portal Settings – Supporting Pages Listing – Grid Layout Properties [Ph2]



General	Description				
HelpID	PortalSettings.SuppPagesListing.GridLayoutProperties				
Title	Grid Layout Properties				
Usage	Defines the grid layout properties for the Supporting Pages listing, including visible fields, column order, and sort order.				
Туре	Modal Dialog				
Open Focus	Available Fields – Table				
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table 				
Related Use Cases	10.6.1 Manage Supporting Pages – List Supporting Pages				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.				

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.SuppPagesListing.GridLayoutProperti es.Apply	
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.SuppPagesListing.GridLayoutProperti es.Assign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.SuppPagesListing.GridLayoutProperti es.AssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	of	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.		
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	h PortalSettings.SuppPagesListing.GridLayoutProperti on es.MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.SuppPagesListing.GridLayoutProperti es.Reset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.		
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.SuppPagesListing.GridLayoutProperti es.SortAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.SuppPagesListing.GridLayoutProperti es.SortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.SuppPagesListing.GridLayoutProperti es.Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.SuppPagesListing.GridLayoutProperti es.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.	•	Filtered by selection in Table field	n/a		PortalSettings.Supp PagesListing.GridLa youtProperties.Avail ableFields	

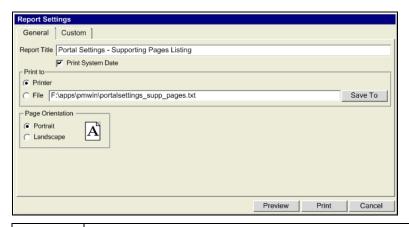
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed. All Tables is one of the drop-down list options, which means all tables applicable to the listing	Drop-down List	All Tables	n/a	n/a	PortalSettings.Supp PagesListing.GridLa youtProperties.Avail ableFields.Table	
Visible Fields	These are the fields that are visible on the grid. The fields appear from left to right in the same order they are listed from top to bottom. The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Supp PagesListing.GridLa youtProperties.Visibl eFields	
Visible Fields – Table	This is the table from which the list of Visible Fields is listed. All Tables is one of the drop-down list options, which means all tables applicable to the listing	Drop-down List	All Tables	n/a	n/a	PortalSettings.Supp PagesListing.GridLa youtProperties.Visibl eFields.Table	

Special Rules and Clarifications

1. Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/01/2002	TAF	Change Source File column to File/URL. Added Source column.
1.02	03/03/2002	TAF	Change HELPID from ".SuppPages" to ".SuppPagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.100. Portal Settings – Supporting Pages Listing – Report Settings – General [Ph3]



General	Description					
HelpID	PortalSettings.SuppPagesListing.ReportSettings.General					
Title	Report Settings → General					
Usage	Sets general parameters for printing the Supporting Pages listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.					
Туре	Modal Dialog					
Open Focus	Report Title					
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close 					
Related Use Cases	10.6.1 Manage Supporting Pages – List Supporting Pages					
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.					

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.SuppPagesListing.ReportSettings.Can cel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.SuppPagesListing.ReportSettings.Pre view	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.SuppPagesListing.ReportSettings.Prin t	

Buttons	Function / Action	Function / Action HelpID	
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Y	Option 1 of 2	n/a	PortalSettings.Supp PagesListing.Report Settings.GeneralPa geOrientation.Lands cape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Y	Option 1 of 2	n/a	PortalSettings.Supp PagesListing.Report Settings.GeneralPa geOrientation.Portra it	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Supp PagesListing.Report Settings.GeneralPri ntSystemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Supp PagesListing.Report Settings.GeneralPri ntto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_supporting pages.txt	Υ	n/a	PortalSettings.Supp PagesListing.Report Settings.GeneralPri ntto.File(path/filena me)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Y	Option 1 of 2	n/a	PortalSettings.Supp PagesListing.Report Settings.GeneralPri ntto.Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Supporting Pages Listing"	N	n/a	PortalSettings.Supp PagesListing.Report Settings.GeneralRe portTitle	

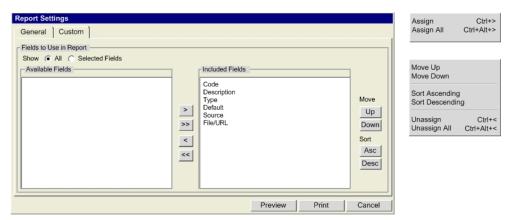
Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- 2. When the report has been saved to the file, a dialog box appears advising the user of this.
- 3. After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

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Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".SuppPages" to ".SuppPagesListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.101. Portal Settings – Supporting Pages Listing – Report Settings – Custom [Ph3]



General	Description
HelpID	PortalSettings.SuppPagesListing.ReportSettings.Custom
Title	Report Settings → Custom
Usage	Sets custom parameters for printing the Supporting Pages listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Show – All
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All
Related Use Cases	10.6.1 Manage Supporting Pages – List Supporting Pages
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Assign (>)		PortalSettings.SuppPagesListing.ReportSettings.Cus tom.Assign	

Buttons	Function / Action	HelpID	Hot Key	
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.SuppPagesListing.ReportSettings.Cus tom.AssignAll		
Cancel	The functionality of this button defined with General Report Settings.	n/a		
Move – Down	e – Down Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report. PortalSettings.SuppPagesListing.ReportSettings.Custom.MoveDown			
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.			
Preview	The functionality of this button defined with General Report Settings.	n/a		
Print	The functionality of this button defined with General Report Settings.	n/a		
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.SuppPagesListing.ReportSettings.Cus tom.SortAsc		
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.SuppPagesListing.ReportSettings.Cus tom.SortDesc		
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.SuppPagesListing.ReportSettings.Cus tom.Unassign		
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.SuppPagesListing.ReportSettings.Cus tom.UnassignAll		

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Supp PagesListing.Report Settings.Custom.Av ailableFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Supp PagesListing.Report Settings.Custom.Inc ludedFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Y	Option 1 of 2	n/a	PortalSettings.Supp PagesListing.Report Settings.Custom.Sh ow.All	

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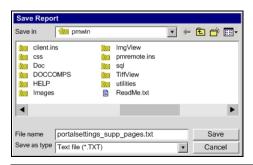
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	Only shows fields that appear on the Supporting Pages Listing.	Option – In a set with All	N	Option 1 of 2		PortalSettings.Supp PagesListing.Report Settings.Custom.Sh ow.Selected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/01/2002	TAF	Change Source File column to File/URL. Added Source column.
1.02	03/03/2002	TAF	Change HELPID from ".SuppPages" to ".SuppPagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.102. Portal Settings – Supporting Pages Listing – Report Settings – General – Save Report (save) [Ph3]



General	Description		
HelpID	PortalSettings.SuppPagesListing.ReportSettings.General.SaveTo.Lookup		
Title	Save Report		
Usage	Defines the file name and location where the report will be stored for printed to file.		
Туре	Modal Dialog		
Open Focus	File name		
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name 		
Related Use Cases	10.6.1 Manage Supporting Pages – List Supporting Pages		
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.		

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
	Allows the user to change the display properties of the folder/file grid.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Lookup.Views	

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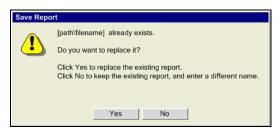
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_supp orting pages.txt	Υ	n/a	PortalSettings.Supp PagesListing.Report Settings.General.Sa veTo.Lookup.FileNa me	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Supp PagesListing.Report Settings.General.Sa veTo.Lookup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Y	n/a	PortalSettings.Supp PagesListing.Report Settings.General.Sa veTo.Lookup.SaveA sType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Supp PagesListing.Report Settings.General.Sa veTo.Lookup.Savel n	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".SuppPages" to ".SuppPagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.103. Portal Settings – Supporting Pages Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.SuppPagesListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.6.1 Manage Supporting Pages – List Supporting Pages
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".SuppPages" to ".SuppPagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.104. Portal Settings – Supporting Pages Listing – Report Settings – General – Save Report Success [Ph3]



General	Description	
HelpID	PortalSettings.SuppPagesListing.ReportSettings.General.SaveReportSuccess	
Title	Save Report Success	
Usage	Advises the user the report file was successfully created.	
Туре	Modal Dialog	
Open Focus	ОК	
Tab Order	1. OK	
Related Use Cases	10.6.1 Manage Supporting Pages – List Supporting Pages	
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.	

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.SuppPagesListing.ReportSettings.Gen eral.SaveReportSuccess.OK	

Spe	cial Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".SuppPages" to ".SuppPagesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.105. Portal Settings – Supporting Page Properties [Ph2]



General	Description
HelpID	Portal.SupportingPageProperties
Title	Supporting Page Properties for [description]where [description] is the supporting page description.
Usage	Defines supporting page properties.
Туре	Standard DE form
Open Focus	Code
Tab Order	 Set as Default Description Type Source (type) Source – Lookup Source – Open Delete Save Close Code
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.6 Manage Supporting Pages Use Cases 10.6.1 Manage Supporting Pages – List Supporting Pages 10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 10.6.4 Manage Supporting Pages – Deleting Existing Supporting Page
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the window. Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).	Portal.SupportingPageProperties.Close	
Delete	Deletes the supporting page.	Portal.SupportingPageProperties.Delete	

Buttons	Function / Action	HelpID	Hot Key
Save	Saves the supporting page record. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Close.	Portal.SupportingPageProperties.Save	
Source – Lookup	Displays the Find File dialog box, allowing the user to locate the file for the supporting page, returning the results to the read-only Source File field. This button is only enabled if the Source (type) is File .	Portal.SupportingPageProperties.SourceFile.Lookup	
Source – Open	Opens the Source File in the default editor corresponding to the file extension. If the file name and/or location is changed as part of editing the Source File , that information must be returned to the read-only Source File field.	Portal.SupportingPageProperties.SourceFile.Open	

Last Updated: 07/15/2003

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the supporting page.	Code		Υ	Υ	Portal.Supporting PageProperties.Cod e	
Description	This is the description of the supporting page.	Text		Υ	Υ	Portal.Supporting PageProperties.Des cription	
Set as Default	This indicates this is the default portal supporting page for the page type.	Checkbox	Unchecked	N	N	Portal.Supporting PageProperties.Set AsDefault	
	If the user checks Set as Default and then saves the record, check to see if an existing default exists for supporting page of the selected page type. If one does exist, display a dialog box that gives the user the option of making the active supporting page the default for the page type (Yes), or keeping the current default for the supporting page type (No).						
Source	This is the source file or URL for the supporting page.	Text		Υ	Υ	Portal.Supporting PageProperties.Sou rce	
Source (type)	This is the type of page that is being used for the supporting page	Drop-down List: File URL	File	Υ	Υ	Portal.Supporting PageProperties.Sou rceType	

Printed: 06/12/2018 Last Updated: 07/15/2003

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Туре	This is the type of supporting page.	Drop-down List: Contact Information Copyright Statement Disclaimer Statement Help Information Under Construction	Contact Info	N	N	Portal.Supporting PageProperties.Typ e	

	Special Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/01/2002	TAF	Added Source (type). Removed the read-only restriction from the Source field. Added restriction to Source File – Lookup, limiting the button to only be enabled when File is selected as the Source (type). Added Under Construction as a Type. Changed text of Types from Contact Info, Copyright, Disclaimer, and Help Info to Contact Information, Copyright Statement, Disclaimer Statement, and Help Information.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.106. Portal Settings – Supporting Page Properties – Find File [Ph2]



General	Description
HelpID	Portal.Supporting PageProperties.FindFile
Title	Find File
Usage	Allows the user to select the file for one of the supporting page fields (Contact Information, Copyright Statement, Disclaimer Statement, Help Information and Under Construction)
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Files of type Open Cancel Look in Toolbar Grid File name
Related Use Cases	10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	Portal.Supporting PageProperties.FindFile.Back	
Cancel	Closes the Find File window without changing the value in the selected supporting page file field.		
New Folder	Creates a new folder within the current Look in folder, and then changes to that new folder as the Look in location.	Portal.Supporting PageProperties.FindFile.NewFolder	
Select	Populates the selected supporting page file field with the values from the Look in and File name fields in a path/file construction.	Portal.Supporting PageProperties.FindFile.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Look in field.	Portal.Supporting PageProperties.FindFile.Up	

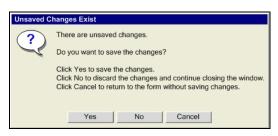
Buttons	Function / Action	HelpID	Hot Key
	Allows the user to change the display properties of the folder/file grid.	Portal.Supporting PageProperties.FindFile.Views	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the supporting page file.	Text		Υ	n/a	Portal.Supporting PageProperties.Find File.FileName	
Folder/File Grid	This is a list of the contents of the Look in folder, with files filtered by the value in the Files of type field.	Grid		Υ	n/a	Portal.Supporting PageProperties.Find File.Grid	
Files of type	This is the file format of the supporting page to find.	Drop-down List: applicable supporting page file types.	All Pictures	Υ	n/a	Portal.Supporting PageProperties.Find File.FilesOfType	
Look in	This is the folder in which the supporting page file the user wants to use is located.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	Portal.Supporting PageProperties.Find File.LookIn	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.107. Portal Settings – Supporting Page Properties – Unsaved Changes Exist [Ph2]



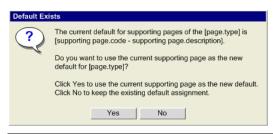
General	Description
HelpID	Portal.Supporting PageProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on the Supporting Page Properties window.
Туре	Modal Dialog Box
Open Focus	Yes
Tab Order	1. No 2. Cancel 3. Yes
Related Use Cases	10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Cancel	Returns the user to the Supporting Page Properties window without saving or discarding the changes.	Portal.Supporting PageProperties.UnsavedChanges.Cancel	
No	Continues closing the Supporting Page Properties window, and discards any changes that have been made to the Supporting Page Properties since the last time the settings were saved.	Portal.Supporting PageProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Supporting Page Properties window.	Portal.Supporting PageProperties.UnsavedChanges.Yes	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.108. Portal Settings – Supporting Page Properties – Default Exists [Ph2]



General	Description
HelpID	Portal.Supporting PageProperties.DefaultExists
Title	Default Exists
Usage	Advises the user that a default already exists for supporting pages of the active type, and gives them the option of using the active supporting as the new default for the page type or keeping the current default assignment for the page type.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates making the active/selected supporting page the default for the page type. If the dialog box was opened from the Supporting Pages Properties DE form, the Set as Default field in that record is cleared before the record is saved.	Portal.Supporting PageProperties.DefaultExists.No	
Yes	Makes the active/selected supporting page the default for the page type, clearing the Set as Default field in the current default supporting page for the page type, and populating the Set as Default field in the active/selected supporting page.	Portal.Supporting PageProperties.DefaultExists.Yes.	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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9.109. Portal Settings – Supporting Page Properties – Delete Confirmation [Ph2]



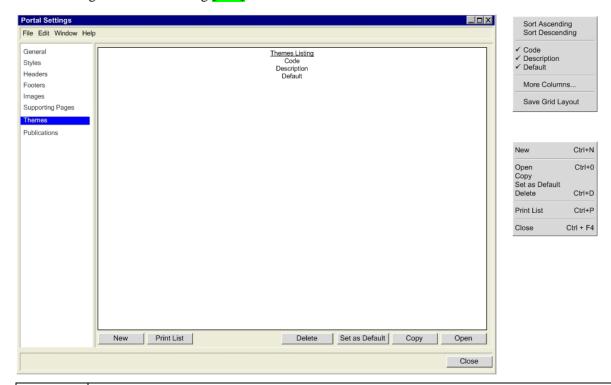
General	Description
HelpID	Portal.Supporting PageProperties.DeleteConfirmation
Title	Delete Confirmation
Usage	Allows the user to either continue deleting the supporting page (Yes), or terminate deleting the supporting page (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.6.1 Manage Supporting Pages – List Supporting Pages 10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 10.6.4 Manage Supporting Pages – Deleting Existing Supporting Page
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the supporting page, and returns the user to the window from which the dialog box was opened.		
Yes	Continues deleting the supporting page, and returns the user to the Supporting Pages listing.	Portal.Supporting PageProperties.DeleteConfirmation.Yes.	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.110. Portal Settings – Themes Listing [Ph2]



General	Description
HelpID	Portal Settings. Themes Listing
Title	Portal Settings → Themes
Usage	Displays a list of themes that are available for use on portals.
Туре	Listing
Open Focus	Grid
Tab Order	 New Print List Delete Set as Default Copy Open Close Grid
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.7 Manage Themes Use Cases 10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme 10.7.5 Manage Themes – Deleting Existing Theme

General Description Phasing Considerations Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

Buttons	Function / Action	HelpID	Hot Key
Close	See 9.1 Portal Settings – General for details on the fur	nctionality of the Close button.	
Сору	Opens a Theme Properties DE form with the Code and Description field blank; however, all other fields are populated with the values from the selected theme.	PortalSettings.ThemesListing.Copy	
Delete	Deletes the selected theme, but first displays a dialog box which gives the user the option of proceeding with deleting the theme or keeping it.	PortalSettings.ThemesListing.Delete	
New	Opens a blank Theme Properties DE form so the user can create a new theme.	PortalSettings.ThemesListing.New	
Open	Opens the Theme Properties DE form of the selected theme.	PortalSettings.ThemesListing.Open	
Print List	Prints the list of themes to a file or printer.	PortalSettings.ThemesListing.PrintList	
Set as Default	Sets the selected theme as the default theme for portals.	PortalSettings.ThemesListing.SetasDefault	
	There can be only one default theme selected.		
	When the user clicks Set as Default , check to see if an existing default exists for themes. If one does exist, display a dialog box that gives the user the option of making the selected theme the default (Yes), or keeping the current default for themes (No).		

Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the theme.	PortalSettings.Them esListing.Code	
Default	This field, when populated, indicates the theme is the default for portals.	PortalSettings.Them esListing.Default	
Description	·	PortalSettings.Them esListing.Description	

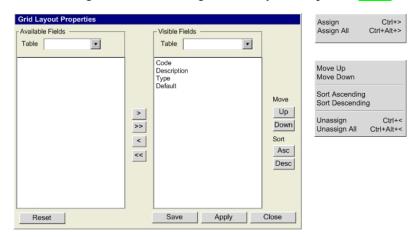
Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- The grid includes a shortcut menu for the records listing, allowing the user to create a new theme, open, copy, set as default or delete an existing theme that has been selected; print the list of themes, or close the window.

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Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/02/2002	TAF	Changed Portal Applications to Portal Apps and Links on the page tree. Added Publications to the page tree.			
1.02	03/03/2002	TAF	Change HELPID from ".Themes" to ".ThemesListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.111. Portal Settings – Themes Listing – Grid Layout Properties [Ph2]



General	Description
HelpID	PortalSettings.ThemesListing.GridLayoutProperties
Title	Grid Layout Properties
Usage	Defines the grid layout properties for the Themes listing, including visible fields, column order, and sort order.
Туре	Modal Dialog
Open Focus	Available Fields – Table
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table
Related Use Cases	10.7.1 Manage Themes – List Themes
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
11 7	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.ThemesListing.GridLayoutProperties.A pply	

Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.ThemesListing.GridLayoutProperties.A ssign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.ThemesListing.GridLayoutProperties.A ssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	PortalSettings.ThemesListing.GridLayoutProperties.C lose	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.ThemesListing.GridLayoutProperties. MoveDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.ThemesListing.GridLayoutProperties. MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.ThemesListing.GridLayoutProperties.R eset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.ThemesListing.GridLayoutProperties.S ave	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.ThemesListing.GridLayoutProperties.SortAsc	
Sort - Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.ThemesListing.GridLayoutProperties.S ortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.ThemesListing.GridLayoutProperties.Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.ThemesListing.GridLayoutProperties.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.		Filtered by selection in Table field	n/a		PortalSettings.Them esListing.GridLayout Properties.Available Fields	

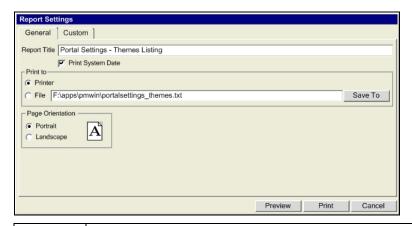
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Them esListing.GridLayout Properties.Available Fields.Table	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing						
Visible Fields	These are the fields that are visible on the grid.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Them esListing.GridLayout Properties.VisibleFi elds	
	The fields appear from left to right in the same order they are listed from top to bottom.					l	
	The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.						
Visible Fields – Table	This is the table from which the list of Visible Fields is listed.	Drop-down List	All Tables	n/a	n/a	PortalSettings.Them esListing.GridLayout Properties.VisibleFi	
	All Tables is one of the drop-down list options, which means all tables applicable to the listing					elds.Table	

Special Rules and Clarifications

Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".Themes" to ".ThemesListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.112. Portal Settings – Themes Listing – Report Settings – General [Ph3]



General	Description					
HelpID	PortalSettings.ThemesListing.ReportSettings.General					
Title	Report Settings \rightarrow General					
Usage	Sets general parameters for printing the Themes listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.					
Туре	Modal Dialog					
Open Focus	Report Title					
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Preview Print Close 					
Related Use Cases	10.7.1 Manage Themes – List Themes					
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.					

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.ThemesListing.ReportSettings.Cancel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.ThemesListing.ReportSettings.Preview	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.ThemesListing.ReportSettings.Print	

Buttons	Function / Action	HelpID	Hot Key
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo	

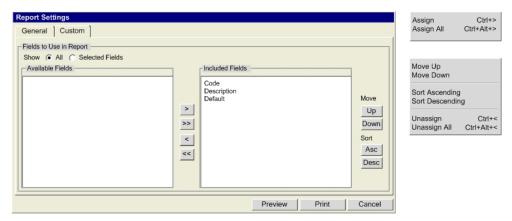
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Υ	Option 1 of 2	n/a	PortalSettings.Them esListing.ReportSett ings.GeneralPageOr ientation.Landscape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Υ	Option 1 of 2	n/a	PortalSettings.Them esListing.ReportSett ings.GeneralPageOr ientation.Portrait	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Them esListing.ReportSett ings.GeneralPrintSy stemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Them esListing.ReportSett ings.GeneralPrintto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_themes.txt	Υ	n/a	PortalSettings.Them esListing.ReportSett ings.GeneralPrintto. File(path/filename)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	PortalSettings.Them esListing.ReportSett ings.GeneralPrintto.Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Themes Listing"	N	n/a	PortalSettings.Them esListing.ReportSett ings.GeneralReport Title	

Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- 2. When the report has been saved to the file, a dialog box appears advising the user of this.
- 3. After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description			
1.00	02/26/2002	TAF	Original Mockup			
1.01	03/03/2002	TAF	Change HELPID from ".Themes" to ".ThemesListing"			
1.10	03/18/2002	TAF	Final mockup for development review and coding.			

9.113. Portal Settings – Themes Listing – Report Settings – Custom [Ph3]



General	Description
HelpID	PortalSettings.ThemesListing.ReportSettings.Custom
Title	Report Settings → Custom
Usage	Sets custom parameters for printing the Themes listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.
Туре	Modal Dialog
Open Focus	Show – All
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) Preview Print Cancel Show – All
Related Use Cases	10.7.1 Manage Themes – List Themes
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
•	Assigns the selected Available Fields , including them in the report.	PortalSettings.ThemesListing.ReportSettings.Custom .Assign	

Buttons	Function / Action	HelpID	Hot Key
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.ThemesListing.ReportSettings.Custom .AssignAll	
Cancel	The functionality of this button defined with General Report Settings.	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.ThemesListing.ReportSettings.Custom .MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.ThemesListing.ReportSettings.Custom .MoveUp	
Preview	The functionality of this button defined with General Report Settings.	n/a	
Print	The functionality of this button defined with General Report Settings .	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.ThemesListing.ReportSettings.Custom .SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.ThemesListing.ReportSettings.Custom .SortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.ThemesListing.ReportSettings.Custom .Unassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.ThemesListing.ReportSettings.Custom .UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.	Assignment panel listing	All fields not included	n/a	n/a	PortalSettings.Them esListing.ReportSett ings.Custom.Availab leFields	
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Them esListing.ReportSett ings.Custom.Include dFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Y	Option 1 of 2	n/a	PortalSettings.Them esListing.ReportSett ings.Custom.Show.	

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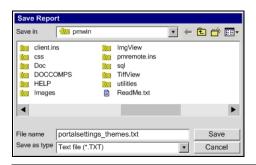
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Show – Selected Fields	Only shows fields that appear on the Themes Listing.	· ·	N	Option 1 of 2		PortalSettings.Them esListing.ReportSett ings.Custom.Show. Selected	

Special Rules and Clarifications

1. Both Available Fields and Included Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Themes" to ".ThemesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.114. Portal Settings – Themes Listing – Report Settings – General – Save Report (save) [Ph3]



General	Description
HelpID	PortalSettings.ThemesListing.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.7.1 Manage Themes – List Themes
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action HelpID		Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
	Allows the user to change the display properties of the folder/file grid.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Lookup.Views	

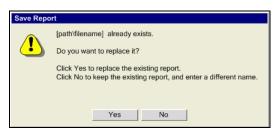
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	Portalsettings_them es.txt	Υ	n/a	PortalSettings.Them esListing.ReportSett ings.General.SaveT o.Lookup.FileName	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Them esListing.ReportSett ings.General.SaveT o.Lookup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Them esListing.ReportSett ings.General.SaveT o.Lookup.SaveAsTy pe	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Them esListing.ReportSett ings.General.SaveT o.Lookup.SaveIn	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Themes" to ".ThemesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.115. Portal Settings – Themes Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.ThemesListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.7.1 Manage Themes – List Themes
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.ThemesListing.ReportSettings.General .SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Themes" to ".ThemesListing"
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.116. Portal Settings – Themes Listing – Report Settings – General – Save Report Success [Ph3]



General	Description
HelpID	PortalSettings.ThemesListing.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.7.1 Manage Themes – List Themes
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.ThemesListing.ReportSettings.General .SaveReportSuccess.OK	

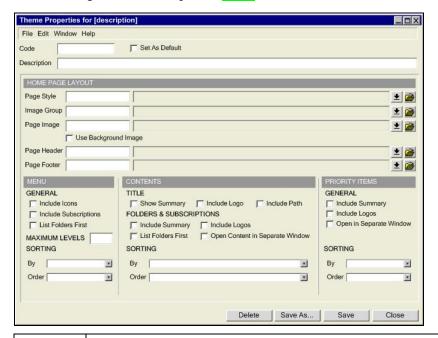
Sp	pecial Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/03/2002	TAF	Change HELPID from ".Themes" to ".ThemesListing"

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9.117. Portal Settings – Theme Properties [Ph2]



General	Description		
HelpID	Portal.ThemeProperties		
Title	Theme Properties for [description]where [description] is the theme description.		
Usage	Defines theme properties, including settings for presentation.		
Туре	Standard DE form		
Open Focus	Code		
Tab Order	 Set as Default Description Page Style – Code Page Style – Lookup Page Group – Code Image Group – Lookup Image Group – Open Image Group – Open Page Image – Code Page Image – Lookup Page Image – Code Page Image – Code Page Image – Open Use Background Image Page Header – Code Page Header – Lookup Page Footer – Code Page Footer – Code Mage Footer – Code Menu – Include Icons Menu – Include Subscriptions Menu – List Folders First 		

General	Description
	22. Menu – Maximum Levels 23. Menu – Sorting – By 24. Menu – Sorting – Order 25. Contents – Title – Include Summary 26. Contents – Title – Include Logo 27. Contents – Title – Include Page 28. Contents – Folders & Subscriptions – Include Summary 29. Contents – Folders & Subscriptions – Include Logos 30. Contents – Folders & Subscriptions – List Folders First 31. Contents – Folders & Subscriptions – Open Content in Separate Window 32. Contents – Sorting – By 33. Contents – Sorting – Order 34. Priority Items – Include Summary 35. Priority Items – Include Logos 36. Priority Items – Open in Separate Window 37. Contents – Sorting – By 38. Contents – Sorting – Order 39. Delete 40. Save As 41. Save 42. Close 43. Code
Related Use Cases	10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme 10.7.5 Manage Themes – Deleting Existing Theme
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the window. Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes), discarding the changes (No), or returning to the Portal Settings – General page (Cancel).	Portal.ThemeProperties.Close	
Delete	Deletes the theme.	Portal.ThemeProperties.Delete	
Image Group – Lookup	Displays the Select Portal Image Groups window.	Portal.ThemeProperties.ImageGroup.Lookup	
Image Group – Open	Opens the Image Group Properties window for the selected image group.	Portal.ThemeProperties.ImageGroup.Open	
Page Footer – Lookup	Displays the Select Portal Footer window.	Portal.ThemeProperties.PageFooter.Lookup	
Page Footer – Open	Opens the Footer Properties window for the selected footer.	Portal.ThemeProperties.PageFooter.Open	

Buttons	Function / Action	HelpID	Hot Key
Page Header - Lookup	Displays the Select Portal Headers window.	Portal.ThemeProperties.PageHeader.Lookup	
Page Header - Open	Opens the Header Properties window for the selected header.	Portal.ThemeProperties.PageHeader.Open	
Page Image – Lookup	Displays the Select Portal Images window.	Portal.ThemeProperties.PageImage.Lookup	
Page Image – Open	Opens the Image Properties window for the selected page image.	Portal.ThemeProperties.PageImage.Open	
Page Style – Lookup	Displays the Select Style window.	Portal.ThemeProperties.PageStyle.Lookup	
Page Style – Open	Opens the Style Properties window for the selected page style.	Portal.ThemeProperties.PageStyle.Open	
Save	Saves the theme record. The window remains open after clicking Save . If the user then wants to apply the saved changes, they can click Close .	Portal.ThemeProperties.Save	
Save As	Displays a dialog box, allowing the user to save the existing theme, including any unsaved changes, as a new theme.	Portal.ThemeProperties.SaveAs	
	This is available only for existing themes.		
	The previous theme record is closed without saving any changes that were made after the record was last saved.		
	The Theme Properties DE form now appears populated for the new theme.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the theme.	Code		Υ	Υ	Portal.ThemeProper ties.Code	
Contents – Folders & Subscriptions – Include Logos	When checked, pages based on this theme will display a logo next to each folder and subscription. If not checked, the logo	Checkbox	N	Y	Y	Portal.ThemeProper ties.Contents.Folder s_Subs.IncludeLogo s	
	will not display, even if it exists in the supporting data record						
Contents – Folders & Subscriptions – List Folders First	When checked, pages based on this theme will list subfolders first, followed by subscriptions.	Checkbox	N	Υ	Υ	Portal.ThemeProper ties.Contents.Folder s_Subs.ListFoldersF irst	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Folders & Subscriptions – Open Content in Separate Window	When checked, pages based on this theme will open subscriptions in a separate window. If this item is not	Checkbox	N	Υ	Υ	Portal.ThemeProper ties.Contents.Folder s_Subs.OpenConte ntinSeparateWindo w	
	checked, subscriptions will open in the main content window.						
Contents – Folders & Subscriptions – Include Summary	When checked, pages based on this theme will display the summary text, if available, below each folder and subscription.	Checkbox	N	Y	Υ	Portal.ThemeProper ties.Contents.Folder s_Subs.ShowSumm ary	
	If not checked, the summary will not appear, even if it exists in the supporting data record.						
Contents – Sorting – By	Indicates how folders and subscriptions on pages based on this theme will be sorted.	Drop-down List: None Alphanumeric Chronological	None	Υ	Υ	Portal.ThemeProper ties.Contents.Sortin g.By	
	If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.						
Contents – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for folders and subscriptions on pages based on this theme.	Drop-down List: Ascending Descending	Ascending if "By" is not None.	Y – If "By" is not None.	Y – If "By" is not None.	Portal.ThemeProper ties.Contents.Sortin g.Order	
	If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.						
Contents – Title – Include Logo	When checked, pages based on this theme will display the logo next to the title.	Checkbox	N	Υ	Υ	Portal.ThemeProper ties.Contents.Title.In cludeLogo	
	If not checked, the logo will not appear.						

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Contents – Title – Include Path	When checked, pages based on this theme will display the path to the current page below the title using the Code value. Each level is a link back up the path. If not checked, the path will not appear.	Checkbox	N	Υ	Υ	Portal.ThemeProper ties.Contents.Title.In cludePath	
Contents – Title – Include Summary	When checked, pages based on this theme will display the summary text, if available, below the title. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	N	Y	Y	Portal.ThemeProper ties.Contents.Title.S howSummary	
Description	This is the description of the theme.	Text		Υ	Υ	Portal.ThemeProper ties.Description	
Image Group	This is the image group to use for the theme.	Code – Searches for image groups by code. Description – Read- only text description of the selected image group.		Υ	Υ	Portal.ThemeProper ties.ImageGroup	
Menu – General – Include Subscriptions	When checked, indicates the menu based on this theme will include subscriptions. If not checked, the menu will only include folders.	Checkbox	N	Υ	Υ	Portal.ThemeProper ties.Menu.General.I ncludeContentItems	
Menu – General – Include Icons	When checked, indicates the menu based on this theme will include icons. If not checked, no icons will appear on the menu.	Checkbox	N	Y	Y	Portal.ThemeProper ties.Menu.General.I ncludeIcons	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Menu – General – List Folders First	When checked, indicates the menu based on this theme will list subfolders before subscriptions within a folder.	Checkbox	N	Y	Y	Portal.ThemeProper ties.Menu.General.L istFoldersFirst	
	If not checked, folders and subscriptions will be mixed together.						
Menu – General – Maximum Levels	This is the maximum number of levels the menu will display. Folders or subscriptions below the Maximum Level will still be accessible by drilling down through summary page links.	Number	5	Y	Y	Portal.ThemeProper ties.Menu.General. MaximumLevels	
Menu – Sorting – By	Indicates how the menus based on this theme will be sorted. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: None Alphanumeric Chronological	None	Y	Y	Portal.ThemeProper ties.Menu.Sorting.B y	
Menu – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for menus based on this theme. If List Folders First is checked, then the folders will be sorted by the selection independently of the subscriptions.	Drop-down List: Ascending Descending	Ascending if "By" is not None.	Y – If "By" is not None.	Y – If "By" is not None.	Portal.ThemeProper ties.Menu.Sorting.O rder	
Page Footer	This is the footer to use for the theme.	Code – Searches for footers by code. Description – Read- only text description of the selected footer.		Υ	Υ	Portal.ThemeProper ties.PageFooter	
Page Header	This is the header to use for the theme.	Code – Searches for headers by code. Description – Read- only text description of the selected header.		Υ	Υ	Portal.ThemeProper ties.PageHeader	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Image	This is the default image to use for the theme.	Code – Searches for images by code. Description – Read- only text description of the selected image.		Y	Y	Portal.ThemeProper ties.PageImage	
Page Style	This is the style to use for the theme.	Code – Searches for styles by code. Description – Read- only text description of the selected style.		Υ	Υ	Portal.ThemeProper ties.PageStyle	
Priority Items – General – Include Logos	When checked, pages based on this theme will display a logo next to each priority item. If not checked, the logo will not display, even if it exists in the supporting data record	Checkbox	N	Υ	Y	Portal.ThemeProper ties.PriorityItems.Ge neral.IncludeLogos	
Priority Items – General – Open in Separate Window	When checked, pages based on this theme will open priority items in a separate window. If this item is not checked, the priority item will open in the main content window.	Checkbox	N	Υ	Y	Portal.ThemeProper ties.PriorityItems.Ge neral.OpeninSepara teWindow	
Priority Items – General – Include Summary	When checked, pages based on this theme will display the summary text, if available, below each priority item. If not checked, the summary will not appear, even if it exists in the supporting data record.	Checkbox	N	Y	Y	Portal.ThemeProper ties.PriorityItems.Ge neral.ShowSummar y	
Priority Items – Sorting – By	Indicates how priority items on pages based on this theme will be sorted.	Drop-down List: None Alphanumeric Chronological	None	Υ	Υ	Portal.ThemeProper ties.PriorityItems.So rting.By	
Priority Items – Sorting – Order	If Alphanumeric or Chronological is selected in the Sort By field, this indicates the order of sorting for priority items on pages based on this theme.	Drop-down List: Ascending Descending	Ascending if "By" is not None.	Y – If "By" is not None.	Y – If "By" is not None.	Portal.ThemeProper ties.PriorityItems.So rting.Order	

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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Set as Default	This indicates this is the default portal theme.	Checkbox	Unchecked	Υ	Υ	Portal.ThemeProper ties.SetasDefault	
Use Background Image	Indicates that pages using this theme will utilizes the backrgound from the selected image.	Checkbox	N	Υ	Υ	Portal.ThemeProper ties.UserBackgroun dlmage	

Last Updated: 07/15/2003

Special Rules and Clarifications

- 1. If the user checks **Set** as **Default** and then saves the record, check to see if an existing default exists for themes. If one does exist, display a dialog box that gives the user the option of making the active theme the default (Yes), or keeping the current default for themes (No).
- 2. For the Title section, if Include Logo, Include Summary, and Include Path are checked, the presentation will use the large logo.
- For the Title section, if Include Logo and Include Summary are checked, but Include Path is not, the presentation will use the medium logo.
- 4. For the **Title** section, if **Include Logo** and **Include Path** are checked, but **Include Summary** is not, the presentation will use the medium logo.
- 5. For the **Title** section, if **Include Logo** is checked, but **Include Summary** and **Include Path** are not, the presentation will use the small logo.
- For the Folders & Subscriptions section, if Include Logo and Include Summary are checked, the presentation will use the large logo.
- 7. For the **Folders & Subscriptions** section, if **Include Logo** is checked, but **Include Summary** is not, the presentation will use the small logo.
- 8. For the **Priority Items** section, if **Include Logo** and **Include Summary** are checked, the presentation will use the large logo.
- 9. For the Priority Items section, if Include Logo is checked, but Include Summary is not, the presentation will use the small logo.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.01	03/01/2002	TAF	Fixed buttons – Page Style Lookup and Open were listed twice, and Page Footer Lookup and Open were missing.
1.10	03/18/2002	TAF	Final mockup for development review and coding. Removed Show Author and Show Dates from Folders & Subscriptions and Priority Items. This is now handled as part of the publication properties.

9.118. Portal Settings – Theme Properties – Save As [Ph2]



General	Description
HelpID	Portal.ThemeProperties.SaveAs.Dialog
Title	Save As
Usage	Allows the user to save the existing theme, including any unsaved changes, as a new theme. This option is available only for existing themes. The previous theme record is closed without saving any changes that were made after the record was last saved. The Theme Properties DE form now appears populated for the new theme.
Туре	Modal DE form
Open Focus	Code
Tab Order	 Description Set as Default OK Cancel Code
Related Use Cases	10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
OK	Save the existing theme, including any unsaved changes, as a new theme using the Code and Description entered.	Portal.ThemeProperties.Portal.SaveAs.Dialog.OK	
	This is available only for existing themes.		
	The previous theme record is closed without saving any changes that were made after the record was last saved.		
	The Theme Properties DE form now appears populated for the new theme.		
Cancel	Cancels the save as operation, and returns the user to the Theme Properties DE form in the state it was left in when Save As was selected.	Portal.ThemeProperties.Portal.SaveAs.Dialog.Cancel	
	Upon closing, if unsaved changes exist, display a dialog box, offering the options of saving the changes (Yes) and advancing to the Style Properties DE form for the new style, discarding the changes (No) and returning to the Style Properties DE form of the original existing style, or returning to the Save As DE form (Cancel).		

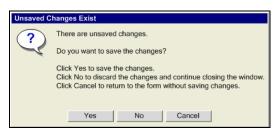
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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Code	This is the code for the theme.	Code		Υ	Υ	Portal.ThemeProper ties.SaveAs.Dialog. Code	
Description	This is the description of the theme.	Text		Υ	Υ	Portal.ThemeProper ties.SaveAs.Dialog. Description	
Set as Default	This indicates this is the default portal theme.	Checkbox	Unchecked	N	N	Portal.ThemeProper ties.SaveAs.Dialog. SetAsDefault	
	If the user checks Set as Default and then saves the record, check to see if an existing default exists for themes. If one does exist, display a dialog box that gives the user the option of making the new active theme the default (Yes), or keeping the current default for themes (No).						

Special Rules and Clarifications
1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.119. Portal Settings – Theme Properties – Unsaved Changes Exist [Ph2]



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General	Description
HelpID	Portal.ThemeProperties.UnsavedChanges
Title	Unsaved Changes Exist
Usage	Alerts the user that unsaved changes exist on the Theme Properties window.
Туре	Modal Dialog Box
Open Focus Yes	
Tab Order	1. No 2. Cancel 3. Yes
Related Use Cases	10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

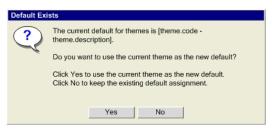
Buttons	Function / Action	HelpID	Hot Key
Cancel Returns the user to the Theme Properties window without saving or discarding the changes.		Portal.ThemeProperties.UnsavedChanges.Cancel	
No	Continues closing the Theme Properties window, and discards any changes that have been made to the Theme Properties since the last time the settings were saved.	Portal.ThemeProperties.UnsavedChanges.No	
Yes	Saves the changes and continues closing the Theme Properties window.	Portal.ThemeProperties.UnsavedChanges.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018 Last Updated: 07/15/2003

9.120. Portal Settings – Theme Properties – Default Exists [Ph2]



General	Description
HelpID	Portal.ThemeProperties.DefaultExists
Title	Default Exists
Usage	Advises the user that a default already exists for themes, and gives them the option of using the active theme as the new default or keeping the current default assignment.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme	
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Buttons	Function / Action	HelpID	Hot Key
No Terminates making the active/selected theme the default.		Portal.ThemeProperties.DefaultExists.No	
	If the dialog box was opened from the Theme Properties DE form, the Set as Default field in that record is cleared before the record is saved.		
Yes	Makes the active/selected theme the default, clearing the Set as Default field in the current default theme, and populating the Set as Default field in the active/selected theme.	Portal.ThemeProperties.DefaultExists.Yes.	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.121. Portal Settings – Theme Properties – Delete Confirmation [Ph2]



General	Description		
HelpID	Portal.ThemeProperties.DeleteConfirmation		
Title Delete Confirmation			
Usage	Allows the user to either continue deleting the theme (Yes), or terminate deleting the theme (No).		
Туре	Modal Dialog		
Open Focus No			
Tab Order	1. Yes 2. No		
Related Use Cases	10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme 10.7.5 Manage Themes – Deleting Existing Theme		
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.		

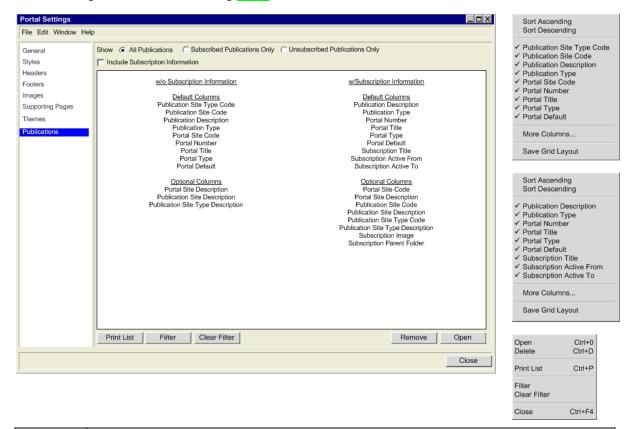
Buttons	Function / Action	HelpID	Hot Key
No	Terminates deleting the theme, and returns the user to the window from which the dialog box was opened.	Portal.ThemeProperties.DeleteConfirmation.No	
Yes	Continues deleting the theme, and returns the user to the Themes listing.	Portal.ThemeProperties.DeleteConfirmation.Yes.	

Special Rules and Clarifications		
1. None.		

Rev No.	Rev Date	Rev By	Revision Description
1.00	02/26/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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9.122. Portal Settings – Publications Listing [Ph2]



General	Description					
HelpID	PortalSettings.Publications					
Title	Portal Settings → Publications					
Usage	Displays a list of publications that are available for use on portals. There are two modes for this listing – without related Subscriptions Information, and with. These modes determine what field sets are available for viewing and reporting.					
Туре	Listing					
Open Focus	Show – All Publications					
Tab Order	 Show – Subscribed Publications Only Show – Unsubscribed Publications Only Include Subscription Information Grid Print List Filter Clear Filter Remove Open Close Show – All Publications 					

General	Description			
Related Use Cases	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.8 Manage Publications Use Cases 10.8.1 Manage Publications – List Publications 8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication			
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.			

Buttons	Function / Action	HelpID	Hot Key
Clear Filter	Clears any previously applied filter criteria, and returns the list to All Publications, with Include Subscription Information not selected.	PortalSettings.PublicationsListing.ClearFilter	
Close	See 9.1 Portal Settings – General for details on the fur	nctionality of the Close button.	
Filter	Displays the Publications Listing Filter window.	PortalSettings.PublicationsListing.Filter	
Open	Opens the Publication Properties DE form of the selected publication.	PortalSettings.PublicationsListing.Open	
Print List	Prints the list of publications to a file or printer.	PortalSettings.PublicationsListing.PrintList	
Remove	Removes the selected publication or subscription, but first displays a dialog box which gives the user the option of proceeding with removing the publication/subscription (Yes) or keeping it (No).	PortalSettings.PublicationsListing.Remove	

Column Headings with Include Subscription Information NOT Selected	Definition	HelpID	Hot Key
Portal Default	This indicates if the portal is the default portal.	PortalSettings.Publi cationsListing.Portal Default	
Portal Number	This is the portal number.	PortalSettings.Publi cationsListing.Portal Number	
Portal Site Code	This is the code of the site for the portal.	PortalSettings.Publi cationsListing.Portal SiteCode	
Portal Site Description	This is the description of the portal site.	PortalSettings.Publi cationsListing.Portal SiteDescription	
Portal Title	This is the portal title.	PortalSettings.Publi cationsListing.Portal Title	

Column Headings with Include Subscription Information NOT Selected	Definition	HelpID	Hot Key
Portal Type	This is the portal type.	PortalSettings.Publi cationsListing.Portal Type	
Publication Description	This is the description of the publication.	PortalSettings.PublicationsListing.PublicationDescription	
Publication Site Code	This is the code of the publication site.	PortalSettings.PublicationsListing.PublicationSiteCode	
Publication Site Description	This is the description of the publication site.	PortalSettings.PublicationsListing.PublicationSiteDescription	
Publication Site Type Code	This is the code of the site type for the publication site.	PortalSettings.PublicationsListing.PublicationSiteTypeCode	
Publication Site Type Description	This is the description of the publication site type.	PortalSettings.PublicationsListing.PublicationSiteTypeDescription	
Publication Type	This is the type of publication (matter, entity, document, note, workflow, timeslip, etc.)	PortalSettings.Publi cationsListing.Public ationType	
Additional Column Headings with "Include Subscription Information" Selected	Definition	HelpID	Hot Key
Subscription Title	This is the title as it appears in the subscription definition for the publication on the selected portal.	PortalSettings.Publi cationsListing.Subsc riptionTitle	
Subscription Active From	This is the date from which the subscription for the publication on the selected portal is active.	PortalSettings.Publi cationsListing.Subsc riptionActiveFrom	
Subscription Active To	This is the date through which the subscription for the publication on the selected portal is active.	PortalSettings.Publi cationsListing.Subsc riptionActiveTo	
Subscription Image	This is the image as it appears in the subscription definition for the publication on the selected portal.	PortalSettings.Publi cationsListing.Subsc riptionImage	
Subscription Parent Folder	This is the parent folder in which the subscription appears for the publication on the selected portal.	PortalSettings.Publi cationsListing.Subsc riptionParentFolder	

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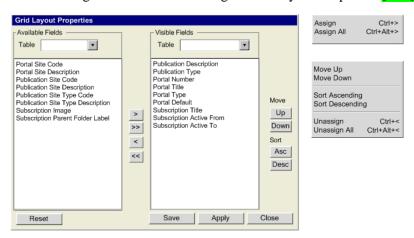
Special Rules and Clarifications

- 1. The grid includes a shortcut menu for column headings, allowing the user to set the sort order as ascending or descending on any of the columns, determine which columns are visible, and save the grid layout specific to the user.
- 2. The grid includes a shortcut menu for the records listing, allowing the user to create a new portal application, open, copy, set as default or delete an existing portal application that has been selected; print the list of portal applications, or close the window.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.123. Portal Settings – Publications Listing – Grid Layout Properties [Ph2]

Printed: 06/12/2018



General	Description					
HelpID	PortalSettings.PublicationsListing.GridLayoutProperties					
Title	Grid Layout Properties					
Usage	Defines the grid layout properties for the Publications listing, including visible fields, column order, and sort order.					
Туре	Modal Dialog					
Open Focus	Available Fields – Table					
Tab Order	 Available Fields Assign (>) Assign All (>>) Visible Fields – Table Visible Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc Sort – Desc Reset Save Apply Close Available Fields – Table 					
Related Use Cases	10.8.1 Manage Publications – List Publications					
Phasing Considerations	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.					

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Grid Layout Properties window and applies the settings.	PortalSettings.PublicationsListing.GridLayoutProperties.Apply	

Buttons	Function / Action	HelpID	
Assign (>)	Makes the selected Available Fields visible on the grid.	PortalSettings.PublicationsListing.GridLayoutProperti es.Assign	
Assign All (>>)	Makes all Available Fields in the selected table visible on the grid.	PortalSettings.PublicationsListing.GridLayoutProperti es.AssignAll	
Close	Closes the Grid Layout Properties window. If unsaved changes exist when clicking close, prompt the user to save changes, giving them the option of saving the changes (Yes), discarding the changes (No), or returning to the Grid Layout Properties window.	PortalSettings.PublicationsListing.GridLayoutProperti es.Close	
Move – Down	Moves the selected Visible Field down the list, which translates moving it to the right in the column order on the grid.	PortalSettings.PublicationsListing.GridLayoutProperti es.MoveDown	
Move – Up	Moves the selected Visible Field up the list, which translates moving it to the left in the column order on the grid.	PortalSettings.PublicationsListing.GridLayoutProperti es.MoveUp	
Reset	Reset the grid layout to the last saved layout.	PortalSettings.PublicationsListing.GridLayoutProperties.Reset	
Save	Saves the grid layout. The window remains open after clicking Save. If the user then wants to apply the saved changes, they can click Apply.	PortalSettings.PublicationsListing.GridLayoutProperti es.Save	
Sort – Asc	Sorts the grid in ascending order by values in the selected Visible Field column.	PortalSettings.PublicationsListing.GridLayoutProperti es.SortAsc	
Sort – Desc	Sorts the grid in descending order by values in the selected Visible Field column.	PortalSettings.PublicationsListing.GridLayoutProperti es.SortDesc	
Unassign (<)	Removes the selected Visible Fields from the grid.	PortalSettings.PublicationsListing.GridLayoutProperti es.Unssign	
Unassign All (<<)	Removes all Visible Fields from the grid.	PortalSettings.PublicationsListing.GridLayoutProperti es.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields	This is the list of fields that do not appear on the grid, but are available for inclusion in the grid.		Filtered by selection in Table field	n/a		PortalSettings.Publi cationsListing.GridL ayoutProperties.Ava ilableFields	

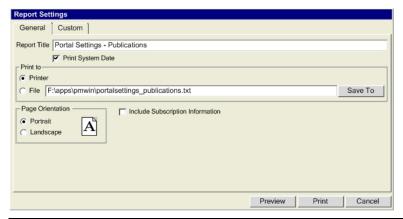
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Fields – Table	This is the table from which the list of Available Fields is listed. All Tables is one of the drop-down list options, which means all tables applicable to the listing	Drop-down List	All Tables	n/a	n/a	PortalSettings.Publi cationsListing.GridL ayoutProperties.Ava ilableFields.Table	
Visible Fields	These are the fields that are visible on the grid. The fields appear from left to right in the same order they are listed from top to bottom. The grid is sorted by the field with the (Asc/Desc) text next to it in the order indicated.	Assignment Panel Listing	Filtered by selection in Table field	n/a	n/a	PortalSettings.Publi cationsListing.GridL ayoutProperties.Visi bleFields	
Visible Fields – Table	This is the table from which the list of Visible Fields is listed. All Tables is one of the drop-down list options, which means all tables applicable to the listing	Drop-down List	All Tables	n/a	n/a	PortalSettings.Publi cationsListing.GridL ayoutProperties.Visi bleFields.Table	

Special Rules and Clarifications Both Available Fields and Visible Fields listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.124. Portal Settings – Publications Listing – Report Settings – General [Ph3]

Printed: 06/12/2018



General	Description				
HelpID	PortalSettings.PublicationsListing.ReportSettings.General				
Title	Report Settings \rightarrow General				
Usage	Sets general parameters for printing the Publications listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.				
Туре	Modal Dialog				
Open Focus	Report Title				
Tab Order	 Print System Date Printer File File (Path and Name) Save To Portrait Landscape Include Subscription Information Preview Print Close 				
Related Use Cases	10.8.1 Manage Publications – List Publications				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Add Required.				

Buttons	Function / Action	HelpID	Hot Key
Cancel	Cancels printing the report and closes the Report Settings window.	PortalSettings.PublicationsListing.ReportSettings.Ca ncel	
Preview	Displays a preview version of the report based on the general and custom settings.	PortalSettings.PublicationsListing.ReportSettings.Pre view	
Print	Prints the report to the selected Print to destination – printer or file.	PortalSettings.PublicationsListing.ReportSettings.Print	

Buttons	Function / Action	HelpID	Hot Key
	Opens the Save Report dialog box, allowing the user to choose a folder in which to save the report, as well as enter a filename. The default settings for the Save Report dialog box are taken from the File field.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Include Subscription Information	When checked, adds the subscription- related fields to the available set of report fields. This box is automatically checked if Include Subscription	Checkbox	N	n/a	n/a	PortalSettings.Publi cationsListing.Repor tSettings.IncludeSu bscriptionInformatio n	
	Information is selected on the Publications listring.						
Page Orientation – Landscape	Indicates the orientation of the printed report is to be landscape.	Option – in a set with Portait	Y	Option 1 of 2	n/a	PortalSettings.Publi cationsListing.Repor tSettings.GeneralPa geOrientation.Lands cape	
Page Orientation – Portrait	Indicates the orientation of the printed report is to be portrait.	Option – in a set with Landscape	Y	Option 1 of 2	n/a	PortalSettings.Publi cationsListing.Repor tSettings.GeneralPa geOrientation.Portra it	
Print System Date	Prints the system date on all report pages.	Checkbox	Checked	N	n/a	PortalSettings.Publi cationsListing.Repor tSettings.GeneralPri ntSystemDate	
Print to – File	Indicates the report is to be printed to a file when the Print button is clicked.	Option – in a set with Printer	N	Option 1 of 2	n/a	PortalSettings.Publi cationsListing.Repor tSettings.GeneralPri ntto.File	
Print to – File (path/filename)	This is the path and filename for the saved report.	Text	(pmroot)\portalsettin gs_publications.txt	Y	n/a	PortalSettings.Publi cationsListing.Repor tSettings.GeneralPri ntto.File(path/filena me)	
Print to – Printer	Indicates the report is to be printed on a printer when the Print button is clicked.	Option – in a set with File	Υ	Option 1 of 2	n/a	PortalSettings.Publi cationsListing.Repor tSettings.GeneralPri ntto.Printer	
Report Title	This is the title that prints on all report pages.	Text	"Portal Settings – Publications Listing"	Υ	n/a	PortalSettings.Publi cationsListing.Repor tSettings.GeneralRe portTitle	

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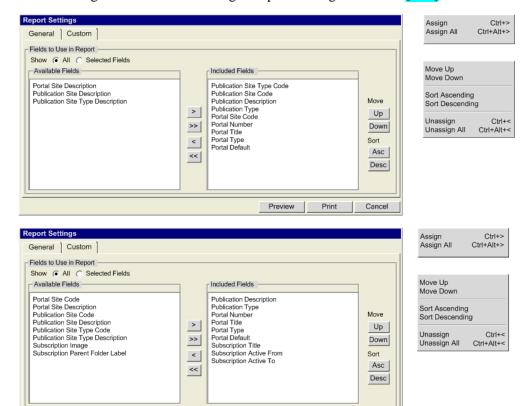
Special Rules and Clarifications

- 1. If the file name exists in the selected folder exists, a dialog box appears giving the user the option of replacing the file (Yes) or keeping the file (No), the latter of which returns the user to the window from which the report was opened (Report Settings or Save Report lookup).
- 2. When the report has been saved to the file, a dialog box appears advising the user of this.
- 3. After the user clicks Print or Print Preview, the action is carried out and the Report Settings window closes.

Rev No.	Rev Date	Rev By	Revision Description				
1.00	03/03/2002	TAF	Original Mockup				
1.10	03/18/2002	TAF	Final mockup for development review and coding.				

9.125. Portal Settings – Publications Listing – Report Settings – Custom [Ph3]

Printed: 06/12/2018



Preview

Print

Cancel

General	Description					
HelpID	PortalSettings.PublicationsListing.ReportSettings.Custom					
Title	Report Settings → Custom					
Usage	Sets custom parameters for printing the Publications listing to a printer of file. Also gives the user the option of previewing the report, with or without printing.					
	There are two sets of fields, as indicated above – the first set is if Include Subscription Information is not selected, and the second set is if Include Subscription Information is selected.					
Туре	Modal Dialog					
Open Focus	Show – All					
Tab Order	 Show – Selected Fields Available Fields Assign (>) Assign All (>>) Included Fields Unassign (<) Unassign All (<<) Move – Up Move – Down Sort – Asc(ending) Sort – Desc(ending) 					

General	Description				
	12. Preview				
	13. Print14. Cancel15. Show – All				
Related Use Cases	10.8.1 Manage Publications – List Publications				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	Function / Action	HelpID	Hot Key
Assign (>)	Assigns the selected Available Fields , including them in the report.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.Assign	
Assign All (>>)	Assigns all Available Fields , including them in the report.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.AssignAll	
Cancel	The functionality of this button defined with General Report Settings.	n/a	
Move – Down	Moves the selected Included Field down the list, which translates moving it to the right in the column order on the report.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.MoveDown	
Move – Up	Moves the selected Included Field up the list, which translates moving it to the left in the column order on the report.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.MoveUp	
Preview	The functionality of this button defined with General Report Settings.	n/a	
Print	The functionality of this button defined with General Report Settings.	n/a	
Sort – Asc	Sorts the report in ascending order by values in the selected Included Field column.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.SortAsc	
Sort – Desc	Sorts the report in descending order by values in the selected Included Field column.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.SortDesc	
Unassign (<)	Removes the selected Included Fields from the report.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.Unassign	
Unassign All (<<)	Removes all Included Fields from the report.	PortalSettings.PublicationsListing.ReportSettings.Cus tom.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Available Fields	These are the fields that are not currently included in the report, but are available for inclusion based on the Show selection.		All fields not included	n/a		PortalSettings.Publi cationsListing.Repor tSettings.Custom.Av ailableFields	

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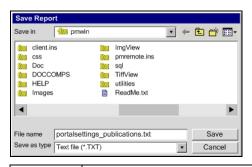
Fields (label)	Definition	Properties	Default	UI Reqd	Db Reqd	HelpID	Hot Key
Included Fields	These are the fields that are currently included in the report, will appear from left to right based on top to bottom order, and will be sorted by the field with (Asc/Desc) to the right of it.	Assignment panel listing	Code Description Default	n/a	n/a	PortalSettings.Publi cationsListing.Repor tSettings.Custom.In cludedFields	
Show – All	Filters the list to show all avialable fields in the table.	Option – In a set with Selected Fields	Υ	Option 1 of 2	n/a	PortalSettings.Publi cationsListing.Repor tSettings.Custom.Sh ow.All	
Show – Selected Fields	Only shows fields that appear on the Portal Apps and Links Listing.	Option – In a set with All	N	Option 1 of 2	n/a	PortalSettings.Publi cationsListing.Repor tSettings.Custom.Sh ow.Selected	

Special Rules and Clarifications

1. Both **Available Fields** and **Included Fields** listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description				
1.00	03/03/2002	TAF	Original Mockup				
1.10	03/18/2002	TAF	Final mockup for development review and coding.				

9.126. Portal Settings – Publications Listing – Report Settings – General – Save Report (save) [Ph3]



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General	Description
HelpID	PortalSettings.PublicationsListing.ReportSettings.General.SaveTo.Lookup
Title	Save Report
Usage	Defines the file name and location where the report will be stored for printed to file.
Туре	Modal Dialog
Open Focus	File name
Tab Order	 Save as type Save Cancel Save in Toolbar Grid File name
Related Use Cases	10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Back (<-)	Goes back through the navigation history since the window has been opened.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Lookup.Back	
Cancel	Closes the Save Report window without changing the value in the File field on the General tab.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Lookup.Cancel	
New Folder	Creates a new folder within the current Save in folder, and then changes to that new folder as the Save in location.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Lookup.NewFolder	
Save	Populates the File field on the General tab with the values from the Save in and File name fields in a path/file construction.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Lookup.Save	
Up One Folder Level	Moves to the parent folder of the folder currently populating the Save in field.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Lookup.Up	

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Buttons	Function / Action	HelpID	Hot Key
Views	Allows the user to change the display properties of the folder/file grid.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Lookup.Views	

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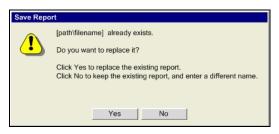
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
File name	This is the name of the file in which the report will be saved.	Text	portalsettings_public ations.txt	Υ	n/a	PortalSettings.Publi cationsListing.Repor tSettings.General.S aveTo.Lookup.FileN ame	
Folder/File Grid	This is a list of the contents of the Save in folder, with files filtered by the value in the Save as type field.	Grid		Υ	n/a	PortalSettings.Publi cationsListing.Repor tSettings.General.S aveTo.Lookup.Grid	
Save as type	This is the file format the report will be saved in.	Drop-down List: applicable file types.	Text File (TXT)	Υ	n/a	PortalSettings.Publi cationsListing.Repor tSettings.General.S aveTo.Lookup.Save AsType	
Save in	This is the folder in which the report will be saved.	Drop-down List: Windows folder tree.	PM Root folder	Υ	n/a	PortalSettings.Publi cationsListing.Repor tSettings.General.S aveTo.Lookup.Save In	

Special Rules and Clarifications

If the File name exists in the Save in location, display an error message giving the user the option of overwriting the existing file (Yes), or returning to the Save Report dialog box (No) where they can modify the values in either the File name or Save in fields.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.127. Portal Settings – Publications Listing – Report Settings – General – Save Report (exists) [Ph3]



General	Description
HelpID	PortalSettings.PublicationsListing.ReportSettings.General.SaveTo.Warning
Title	Save Report
Usage	Warns the user the report file name already exists in the selected location, and gives the user the option to overwrite the existing file (Yes) or return to the window from which the dialog was opened and modify the file name and/or location.
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No	Returns the user to the window from which the dialog opened, allowing them to change the file name or location.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Warning.No	
Yes	Overwrites the existing file when the user prints the report.	PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveTo.Warning.Yes	

Special Rules and Clarifications 1. None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.128. Portal Settings – Publications Listing – Report Settings – General – Save Report Success [Ph3]



General	Description
HelpID	PortalSettings.PublicationsListing.ReportSettings.General.SaveReportSuccess
Title	Save Report Success
Usage	Advises the user the report file was successfully created.
Туре	Modal Dialog
Open Focus	OK
Tab Order	1. OK
Related Use Cases	10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
OK		PortalSettings.PublicationsListing.ReportSettings.Ge neral.SaveReportSuccess.OK	

Spe	cial Rules and Clarifications
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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9.129. Portal Settings – Publications Listing – Filter [Ph3]



General	Description
HelpID	PortalSettings.PublicationsListing.Filter
Title	Publications Listing Filter
Usage	Allows the user to select one or more portal sites, sites, portal types, and/or publications on which to filter the Publications listing.
Туре	Modal Dialog
Open Focus	Portal Site – Code
Tab Order	 Portal Site – Lookup Portal – Code Portal – Lookup Portal Type – Code Portal Type – Lookup Publication Type Publication – Lookup Clear Apply Close Portal Site – Code
Related Use Cases	10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the window and applies the filter criteria to the listing.	PortalSettings.PublicationsListing.Filter.Apply	
Clear	Closes the window and removes the filter criteria from the listing.	PortalSettings.PublicationsListing.Filter.Clear	
Close	Closes the window without changing the state of the listing.	PortalSettings.PublicationsListing.Filter.Close	
Portal – Lookup	Displays the Select Portal window from which the user can select one or more portal sites to use for filtering the listing.	PortalSettings.PublicationsListing.Filter.PortalSite.Lo okup	

Buttons	Function / Action	HelpID	Hot Key
Portal Site – Lookup	Displays the Select Portal Site window from which the user can select one or more portal sites to use for filtering the listing.	PortalSettings.PublicationsListing.Filter.PortalSite.Lo okup	
Publication – Lookup	Displays the Select Publication window from which the user can select one or more portal sites to use for filtering the listing.	PortalSettings.PublicationsListing.Filter.Publication.L ookup	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Portal	These are the portal on which the listing is filtered. If more than one portal is selected, each portal appears in these fields with a slash ("/") between each entry.	Code – Searches for portal based on portal number. Description – Read- only text description of the selected portal.		n/a	n/a	PortalSettings.PublicationsListing.PublicationsListing.Filter.Portal	
Portal Site	These are the portal sites on which the listing is filtered. If more than one portal site is selected, each portal site appears in these fields with a slash ("/") between each entry.	Code – Searches for portal sites based on code. Description – Read- only text description of the selected portal sites.		n/a	n/a	PortalSettings.Publi cationsListing.Public ationsListing.Filter.P ortalSite	
Portal Type	These are the portal types on which the listing is filtered. If more than one portal type is selected, each portal type appears in these fields with a slash ("/") between each entry.	Code – Searches for portal types based on code. Description – Read- only text description of the selected portal types.		n/a	n/a	PortalSettings.PublicationsListing.Filter.PortalTypes	
Publication Type	This is the type of publication on which the listing is filtered.	Drop-down List on the following: Matters Entities Documents Notes Timeslips Web-links Workflow		n/a	n/a	PortalSettings.PublicationsListing.PublicationsListing.Filter.PublicationTypes	

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Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Publications	These are the publications on which the listing is filtered. If more than one publication is selected, each publication appears in these fields with a slash ("/") between each entry. This field is only enabled if a Publication Type is selected.	Description – Read- only text description of the selected publications.		n/a	n/a	PortalSettings.Public cationsListing.Public ationsListing.Filter.Publications	

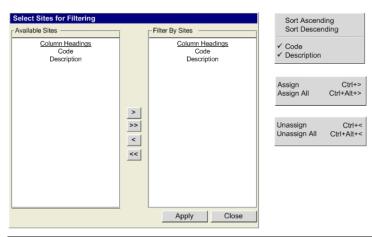
Special Rules and Clarifications	
1. None	

Rev No.	Rev Date	Rev By	Revision Description		
1.00	03/03/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

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9.130. Portal Settings – Publications Listing – Filter – Select Portal Sites [Ph3]



General	Description				
HelpID	PortalSettings.PublicationsListing.Filter.SelectPortalSites				
Title	Select Portal Sites for Filtering				
Usage	Allows the user to select one or more portal sites on which to filter the Publications Listing .				
Туре	Modal Dialog				
Open Focus	Available Sites				
Tab Order	 Assign (>) Assign All (>>) Filter By Sites Unassign (<) Unassign All (<<) Apply Close Available Sites 				
Related Use Cases	10.8.1 Manage Publications – List Publications				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Select Portal Sites for Filtering window, and populates the Portal Sites field on the filter window with the selected portal sites.	PortalSettings.PublicationsListing.Filter.SelectPortalSites.Apply	
Assign (>)	Makes the selected Available Sites part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalSites.Assign	
Assign All (>>)	Makes all Available Sites part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalSites.AssignAll	

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Select Portal Sites for Filtering window.	PortalSettings.PublicationsListing.Filter.SelectPortalSites.Close	
Unassign (<)	Removes the selected Filter By Portal Sites from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalS ites.Unassign	
Unassign All (<<)	Removes all Filter By Portal Sites from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalS ites.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Portal Sites	This is the list of sites that are not part of the Publications Listing Filter , but are available for use.	Assignment Panel Listing	All sites not in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPortalSites.Av ailablePortalSites	
	The list of sites is pre- filtered to show only those sites of the portal site type.						
Filter By Portal Sites	This is the list of sites that are part of the Publications Listing Filter.	Assignment Panel Listing	All sites in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPortalSites.Fil terByPortalSites	
	The list of sites is pre- filtered to show only those sites of the portal site type.						

Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the portal site.	PortalSettings.Publi cationsListing.Filter. SelectPortalSites.C ode	
Description	This is the description of the portal site.	PortalSettings.Publi cationsListing.Filter. SelectPortalSites.D escription	

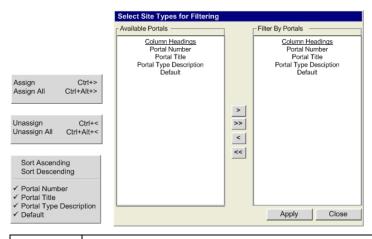
Special Rules and Clarifications

1. Both Available Portal Sites and Filter By Portal Sites listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.131. Portal Settings – Publications Listing – Filter – Select Portals [Ph3]

Printed: 06/12/2018



General	Description				
HelpID	PortalSettings.PublicationsListing.Filter.SelectPortals				
Title	Select Portals for Filtering				
Usage	Allows the user to select one or more portals on which to filter the Publications Listing .				
Туре	Modal Dialog				
Open Focus	Available Portals				
Tab Order	 Assign (>) Assign All (>>) Filter By Portals Unassign (<) Unassign All (<<) Apply Close Available Portals 				
Related Use Cases	10.8.1 Manage Publications – List Publications				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	ns Function / Action HelpID		Hot Key
Apply	Closes the Select Portals for Filtering window, and populates the Portal field on the filter window with the selected portals.	PortalSettings.PublicationsListing.Filter.SelectPortals. Apply	
Assign (>)	Makes the selected Available Portals part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortals. Assign	
Assign All (>>)	Makes all Available Portals part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortals. AssignAll	

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Select Portals for Filtering window.	PortalSettings.PublicationsListing.Filter.SelectPortals. Close	
Unassign (<)	Removes the selected Filter By Portals from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortals. Unassign	
Unassign All (<<)	Removes all Filter By Portals from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortals. UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Portals	This is the list of portals that are not part of the Publications Listing Filter , but are available for use.	Assignment Panel Listing	All portals not in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPortals.Availa blePortals	
Filter By Portals	This is the list of portals that are part of the Publications Listing Filter.	Assignment Panel Listing	All portals in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPortals.FilterB yPortals	

Column Heading	Definition	HelpID	Hot Key
Default	This indicates the portal is the default.	PortalSettings.Publi cationsListing.Filter. SelectPortals.Defaul t	
Portal Number	This is the number for the portal.	PortalSettings.Publi cationsListing.Filter. SelectPortals.Portal Number	
Portal Title	This is the title of the portal.	PortalSettings.Publi cationsListing.Filter. SelectPortals.Portal Title	
Portal Type Description	This is the description of the portal type for the portal.	PortalSettings.Publi cationsListing.Filter. SelectPortals.Portal Type	

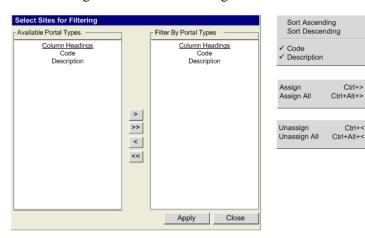
Special Rules and Clarifications

Both Available Portals and Filter By Portals listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018

9.132. Portal Settings – Publications Listing – Filter – Select Portal Types [Ph3]



General	Description				
HelpID	PortalSettings.PublicationsListing.Filter.SelectPortalTypes				
Title	Select Portal Types for Filtering				
Usage	Allows the user to select one or more portal types on which to filter the Publications Listing .				
Туре	Modal Dialog				
Open Focus	Available Portal Types				
Tab Order	 Assign (>) Assign All (>>) Filter By Portal Types Unassign (<) Unassign All (<<) Apply Close Available Portal Types 				
Related Use Cases	10.8.1 Manage Publications – List Publications				
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.				

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Select Portal Types for Filtering window, and populates the Portal Types field on the filter window with the selected types.	PortalSettings.PublicationsListing.Filter.SelectPortalT ypes.Apply	
Assign (>)	Makes the selected Available Portal Types part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalT ypes.Assign	
Assign All (>>)	Makes all Available Portal Types part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalT ypes.AssignAll	

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Select Portal Types for Filtering window.	PortalSettings.PublicationsListing.Filter.SelectPortalT ypes.Close	
Unassign (<)	Removes the selected Filter By Portal Types from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalT ypes.Unassign	
Unassign All (<<)	Removes all Filter By Portal Types from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPortalT ypes.UnassignAll	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Portal Types	This is the list of portal types that are not part of the Publications Listing Filter , but are available for use.	Assignment Panel Listing	All portal types not in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPortalTypes.A vailablePortalTypes	
Filter By Portal Types	This is the list of portal types that are part of the Publications Listing Filter.	Assignment Panel Listing	All portal types in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPortalTypes.F ilterByPortalTypes	

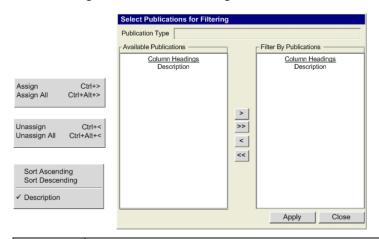
Column Heading	Definition	HelpID	Hot Key
Code	This is the code for the portal type.	PortalSettings.Publi cationsListing.Filter. SelectPortalTypes.C ode	
Description	This is the description of the portal type.	PortalSettings.Publi cationsListing.Filter. SelectPortalTypes.D escription	

Special Rules and Clarifications Both Available Portal Types and Filter By Portal Types listings should support multi-select, quick filtering, and drag/n'drop.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.133. Portal Settings – Publications Listing – Filter – Select Publications [Ph3]

Printed: 06/12/2018



General	Description
HelpID	PortalSettings.PublicationsListing.Filter.SelectPublications
Title	Select Publications for Filtering
Usage	Allows the user to select one or more publications on which to filter the Publications Listing .
Туре	Modal Dialog
Open Focus	Available Publications
Tab Order	 Assign (>) Assign All (>>) Filter By Publications Unassign (<) Unassign All (<<) Apply Close Available Publications
Related Use Cases	10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
Apply	Closes the Select Publications for Filtering window, and populates the Publications field on the filter window with the selected publications.	PortalSettings.PublicationsListing.Filter.SelectPublications.Apply	
Assign (>)	Makes the selected Available Publications part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPublications.Assign	
Assign All (>>)	Makes all Available Publications part of the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPublications.AssignAll	

Buttons	Function / Action	HelpID	Hot Key
Close	Closes the Select Publications for Filtering window.	PortalSettings.PublicationsListing.Filter.SelectPublications.Close	
Unassign (<)	Removes the selected Filter By Publications from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPublications.Unassign	
Unassign All (<<)	Removes all Filter By Publications from the listing filter.	PortalSettings.PublicationsListing.Filter.SelectPublications.UnassignAll	

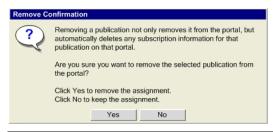
Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Available Publications	This is the list of publications that are not part of the Publications Listing Filter, but are available for use.	Assignment Panel Listing	All publications not in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPublications.A vailablePublications	
	The list of publications is pre-filtered to show only those of the selected Publication Type on the Publication Listing Filter window.						
Filter By Publications	This is the list of publications that are part of the Publications Listing Filter.	Assignment Panel Listing	All publications in the filter	n/a	n/a	PortalSettings.Publi cationsListing.Filter. SelectPublications.F ilterByPublications	
	The list of publications is pre-filtered to show only those of the selected Publication Type on the Publication Listing Filter window.						

Column Heading	Definition	HelpID	Hot Key
Description		PortalSettings.Publi cationsListing.Filter. SelectPublications. Description	

Special Rules and Clarifications 1. Both Available Publications and Filter By Publications listings should support multi-select, quick filtering, and drag'n'drop.

Rev No.	No. Rev Date Rev By Revision Description		Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

9.134. Portal Settings – Publications Listing – Remove Confirmation – Publication [Ph3]



Printed: 06/12/2018

General	Description
HelpID	PortalSettings.PublicationsListing.RemoveConfirmation.Publications
Title	Remove Confirmation
Usage	Allows the user to either continue removing the publication (Yes), or terminate removing the publication (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No		PortalSettings.PublicationsListing.RemoveConfirmation.Publications.No	
Yes	Continues removing the publication, and returns the user to the Publications listing.	PortalSettings.PublicationsListing.RemoveConfirmation.Publications.Yes.	

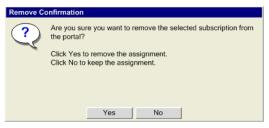
Special Rules and Clarifications None.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Printed: 06/12/2018

Last Updated: 07/15/2003

9.135. Portal Settings – Publications Listing – Remove Confirmation – Subscription [Ph3]



General	Description
HelpID	PortalSettings.PublicationsListing.RemoveConfirmation.Subscriptions
Title	Remove Confirmation
Usage	Allows the user to either continue removing the subscription (Yes), or terminate removing the subscription (No).
Туре	Modal Dialog
Open Focus	No
Tab Order	1. Yes 2. No
Related Use Cases	10.8.1 Manage Publications – List Publications
Phasing Considerations	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.

Buttons	Function / Action	HelpID	Hot Key
No		PortalSettings.PublicationsListing.RemoveConfirmation.Subscriptions.No	
Yes	Continues removing the subscription, and returns the user to the Subscriptions listing.	PortalSettings.PublicationsListing.RemoveConfirmation.Subscriptions.Yes.	

Special Rules and Clarifications	
1. None.	

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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10. Portal Settings – Use Cases

To be written.

10.1. Manage Portal Settings Use Cases

10.1.1. Manage Portal Settings – Set General Portal Settings [Ph1]

Goal in Context	Manage the General Portal Settings, which are used to provide default settings for portals, folders, subscriptions and publications, as well as the portal presentation.	
Scope & Level	Portal Settings	
Preconditions	The firm has installed the portal integration. The user has security clearance to administer portal settings.	
Success End Condition	The settings are saved and respected when new portals, folders, subscriptions or publications are added to the system.	
Failed End Condition	The settings are not saved. The settings are not respected when new portals, folders, subscriptions or publications are added to the system.	
Primary Actors	System Administrator	
Secondary Actors	Advanced users who have a thorough understanding of the Portal Integration.	
Trigger	User choose Portal Settings from the Administration menu.	

STEPS

- 1. From the Administration menu, choose Portal Settings.
- 2. The Portal Settings window appears in the following state:
 - a. The General page active.
 - b. All fields are blank.
 - c. The Save button is disabled.
 - d. The Close button is enabled.
- Choose a default Site Type for Portals. Once selected and saved, this field cannot be changed.
- **4.** Enter the **Base Domain Name**. Once entered and saved, this field cannot be changed.
- 5. Select a default Portal.
 - **a.** If this field is left blank, an "Under Construction" page appears instead of a portal when a user logs in to the system.
 - **b.** This field can be changed later if no portals exhaust, or the first elects to use a different portal as the default.
- 6. Set Publication and Availability Defaults:
 - a. Click on the Matters tab to set the publishing and subscribing default rules for matters.
 - **b.** Click on the **Entities** tab to set the publishing and subscribing default rules for entities.
 - C. Click on the **Documents** tab to set the publishing and subscribing default rules for documents.
 - **d.** Click on the **Notes** tab to set the publishing and subscribing default rules for notes.

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- e. Click on the **Workflow** tab to set the publishing and subscribing default rules for workflow items.
- f. Click on the Timeslips tab to set the publishing and subscribing default rules for timeslips.
- **g.** Click on the **Folders** tab to set the publishing and subscribing default rules for folders.
- 7. Save the settings.
- 8. Manage Styles, Headers, Footers, Images, Supporting Pages, Themes and Publications as needed.
- 9. When finished, click Close.

EXTENSION - SELECT PORTAL

To select a **Portal**, carry out one of the following:

- 1. Enter the number of the portal, and press **Tab**.
 - **a.** If the portal is found, the number field is populated with the portal number and description field is populated with the portal title.
 - b. If the portal is not found, the words Record Not Found appear in the portal number field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Portal** window appears. Choose a portal, and click **Select**. The number field is populated with the portal number and description field is populated with the portal title.

EXTENSION - SELECT THEME

To select a **Theme** carry out one of the following:

- 1. Enter the code of the theme, and press **Tab**.
 - **a.** If the theme is found, the code field is populated with the theme code and description field is populated with the theme description.
 - b. If the theme is not found, the words **Record Not Found** appear in the theme code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Theme** window appears. Choose a theme, and click **Select**. The code field is populated with the theme code and description field is populated with the theme decription.

EXTENSION – UNSAVED CHANGES

If unsaved changes exist on the General page, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Portal Settings window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- **2.** The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

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RELATED INFORMATION

Priority	High, as managing portals is very labor intensive at this time.
Performance	Less than 5 minutes, including consideration of functionality (defaults) the user wants to implement.
Frequency	Once, when portals are initially configured. Infrequently, after that.
Channels to Actors	Menu based.
Open Issues	Phase 1 will not include the option to open the default Portal or default Theme from the General page.
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	None.
Subordinates	12.1.1 Select Portal 12.1.9 Select Portal Theme 10.2 Manage Styles Use Cases 10.3 Manage Headers Use Cases 10.4 Manage Footers Use Cases 10.5 Manage Image Settings Use Cases 10.6 Manage Supporting Pages Use Cases 10.7 Manage Themes Use Cases 10.7.4 Manage Themes – Modify Existing Theme 10.8 Manage Publications Use Cases

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10.2. Manage Styles Use Cases

10.2.1. Manage Styles – List Styles [Ph2]

Goal in Context	List available styles defined in Practice Manager for use with portals.		
Scope & Level	Portal Settings		
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open.		
Success End Condition	All available styles are listed.		
Failed End Condition	All styles are not listed, even with any filtering removed.		
Primary Actors	System Administrator		
Secondary Actors	Intermediate to advanced user who has an understanding of how portal styles are used.		
Trigger	User chooses to list styles with the intent of carrying out some management function.		

STEPS

- 1. Click on Styles.
- 2. The list of previously defined styles appears in the following state:
 - a. Focus is on the grid, and the first style is selected.
 - **b.** All buttons are enabled.
- **3.** Manipulate the listing as needed in order to locate styles:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - c. Hot filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Add new styles.
 - **b.** Copy an existing style, creating a new one in the process.
 - Set one of the styles as the default.
 - d. Modify existing styles.
 - Delete existing styles.
 - Print the list of styles.
- 5. Manage General properties, Headers, Footers, Images, Supporting Pages, Themes and Publications as needed.
- 6. When finished, click Close.

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EXTENSION – SORT THE LISTING

To sort the style listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION – HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- **2.** Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - **a.** To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- 3. To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More columns**.

- 1. The **Grid Layout Properties** window appears in the following state:
 - **a.** The fields that are currently visible on the grid appear in the **Visible Fields** listing in the same order from top to bottom that they appear from left to right.
 - b. All is selected in both Table fields.
 - **c.** The fields that are currently not visible appear in the **Available Fields** listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - e. The Reset, Save, Apply and Close buttons are enabled.

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- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - b. Highlight and drag a field from the Available Fields listing o the Visible Fields listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- **4.** Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - b. To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click **Reset**.
- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

- 1. Click Print List.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose **Printer**.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.

- **6.** Modify the layout of the report, as needed, by clickin on the **Custom** tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time **Print List** was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - **b.** Move **Available Fields** to the **Included Fields** listing to add them to the grid.
 - i. Double-click on a field on the Available Fields listing.
 - Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign** (>).
 - v. Click Assign All (>>).
 - c. Move Included Fields to the Available Fields listing to remove them to the grid.
 - i. Double-click on a field on the **Included Fields** listing.
 - ii. Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the **Included Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - v. Click Unassign All (<<).
 - **d.** Order the columns as needed:
 - To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
 - **e.** Sort the list by highlighting a column label in the **Included Fields** listing, and choosing either **Sort Asc(ending)** or **Sort Desc(ending)**.
- 7. To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details.

 The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- 8. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.
 - The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings General page, where they may change the file name and/or location.
 - ii. After the report has been successfully saved, the Report Settings window closes and a dialog box appears. Choosing OK closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Styles.
Channels to Actors	Styles tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases
Subordinates	10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 10.2.6 Manage Styles – Deleting Existing Style

10.2.2. Manage Styles – Create New Style [Ph2]

Goal in Context	Create a new style that can then be used on a portal home page, folder summary page or theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The Styles listing is active.
Success End Condition	The style is added to the Styles listing, and is available on the Select Styles window.
Failed End Condition	The style is not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal styles are used.
Trigger	Use chooses to create a new style.

STEPS

- 1. Choose New.
- 2. The Style Properties DE form appears in the following state:
 - a. All fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - c. Close is enabled.
- 3. Enter a Code for the style.
- 4. Enter a **Description** for the style.
 - a. Save is now enabled.
- 5. If you want this style to be the default, check Set as Default.
- 6. Enter/edit the code for the menu in the Style Code field on the Menu tab.
- 7. Enter/edit the code for the header in the Style Code field on the Header tab.
- **8.** Enter/edit the code for the subscription summary page in the **Style Code** field on the **Content** tab.
- 9. Enter/edit the code for the footer in the Style Code field on the Footer tab.
- 10. Click Save to save the style.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 11. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.

Clicking Cancel returns the user to the Style Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default style already exists, a dialog box appears.

- 1. Click Yes to use the current style as the new default, and continue closing the window.
- 2. Click **No** to keep the existing style as the default, and continue closing the window.

EXTENSION - EDITING THE STYLE CODE

The **Style Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Style Elements** are those that are required for use on the portal for the applicable component (**Menu**, **Header**, **Content** and **Footer**).

When an element is selected, the text of that element is copied into the **Style Code** field. Selection is carried out using any of the following methods:

- 1. If the Style Element text already exists in the Style Code field, remove it.
- 2. Position the cursor in the Style Code field where you want the code text to appear.
- **3.** Highlight a **Style Element**, and choose **Copy (>)**. The code is copied into the **Style Code** field at the cursor position.
- 4. Highlight a **Style Element**, hold the **Control** key down, select additional **Style Elements**, then click **Copy** (>).
- **5.** Click **Copy All (>>)**. This is best down after you have completely cleared the contents of the **Style Code** field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Style Element** already exists in the **Style Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal styles as soon as they start rolling them out for departments and clients.
Performance	Opening a style, < 10 seconds. Saving a style, < 10 seconds, including integrity checks. Closing the style window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Styles tab.
Open Issues	None.

Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles
Subordinates	10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 10.2.5 Manage Styles – Print Style Properties 10.2.6 Manage Styles – Deleting Existing Style

10.2.3. Manage Styles – Copy Existing Style [Ph2]

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Goal in Context	Copy a previously created style and save as a new style.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The style to be copied exists.
	The style to be copied is either on the Styles listing (Method 1), or the Style Properties DE form for the style to be copied is open (Method 2).
Success End Condition	The new style is added to the Styles listing, and is available on the Select Styles window.
	The original style is still in tact.
Failed End Condition	The new style is not added.
	The existing style is overwritten.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal styles are used.
Trigger	User chooses to copy an existing style.

STEPS - METHOD 1 (COPY FROM LISTING)

- **1.** Highlight the style to copy, and choose **Copy**.
- 2. The Style Properties DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - **c.** The **Style Code** fields on the **Menu**, **Header**, **Content** and **Footer** tabs are populated with the values from the selected style.
- 3. Enter a Code for the style.
- 4. Enter a **Description** for the style.
 - a. Save is now enabled.

- 5. If you want this style to be the default, check Set as Default.
- 6. Modify the style code for the menu in the Style Code field on the Menu tab.
- 7. Modify the style code for the header in the Style Code field on the Header tab.
- Modify the style code for the subscription summary page in the Style Code field on the Content tab.
- 9. Modify the style code for the footer in the Style Code field on the Footer tab.
- 10. Click Save to save the style.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 11. When finished, click Close.

STEPS - METHOD 2 (SAVE AS FROM DE FORM)

- 1. Choose Save As.
- **2.** The **Save As** DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - **b. OK** is disabled.
 - c. Cancel is enabled.
- 3. Enter a Code for the style.
- 4. Enter a **Description** for the style.
 - a. OK is now enabled.
- 5. If you want this style to be the default, check **Set as Default**.
- 6. Click OK.
- The Stype Properties DE form for the original style is closed without saving any changes, even if they existed.
- **8.** An updated **Stype Properties** DE form appears in the following state:
 - a. The Code, Description and Set as Default fields populated with the values from the Save As window.
 - b. The Print, Delete, Save As, Save and Close buttons are enabled.
 - C. The Style Code fields on the Menu, Header, Content and Footer tabs are populated with the values from the previously opened style.
- 9. Modify the style code for the menu in the Style Code field on the Menu tab.
- 10. Modify the style code for the header in the Style Code field on the Header tab.
- Modify the style code for the subscription summary page in the Style Code field on the Content tab.
- 12. Modify the style code for the footer in the Style Code field on the Footer tab.
- **13.** Click **Save** to save the style.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 14. When finished, click Close.

EXTENSION - UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Style Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default style already exists, a dialog box appears.

- 1. Click Yes to use the current style as the new default, and continue closing the window.
- 2. Click No to keep the existing style as the default, and continue closing the window.

EXTENSION – EDITING THE STYLE CODE

The **Style Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Style Elements** are those that are required for use on the portal for the applicable component (**Menu**, **Header**, **Content** and **Footer**).

When an element is selected, the text of that element is copied into the **Style Code** field. Selection is carried out using any of the following methods:

- 1. If the Style Element text already exists in the Style Code field, remove it.
- 2. Position the cursor in the Style Code field where you want the code text to appear.
- 3. Highlight a **Style Element**, and choose **Copy (>)**. The code is copied into the **Style Code** field at the cursor position.
- 4. Highlight a **Style Element**, hold the **Control** key down, select additional **Style Elements**, then click **Copy** (>).
- 5. Click Copy All (>>). This is best down after you have completely cleared the contents of the Style Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Style Element** already exists in the **Style Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start copying portal styles as soon as they start rolling them out for departments and clients.
Performance	Displaying the Save As window, < 2 seconds. Closing the Save As window with OK, < 5 seconds. Saving the style, < 10 seconds, including integrity checks. Closing the style window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Styles tab. Style Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.4 Manage Styles – Modify Existing Style
Subordinates	10.2.5 Manage Styles – Print Style Properties 10.2.6 Manage Styles – Deleting Existing Style

Last Updated: 07/15/2003

10.2.4. Manage Styles – Modify Existing Style [Ph2]

Goal in Context	Modify an existing style.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The style to be modified exists.
	The Styles listing is active.
Success End Condition	Changes to the style are saved.
Failed End Condition	Changes to the style are not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal styles are used.
Trigger	Use chooses to modify an existing style.

STEPS

- 1. Highlight the style to be modifed.
- 2. Choose Open.
- 3. The Style Properties DE form appears in the following state:
 - a. All fields are populated with the values last saved.
 - b. Save is disabled.
 - c. Print, Delete, Save As, and Close are enabled.
- 4. Modify any fields as needed.
 - a. Save is now enabled.
- 5. Click Save to save the style.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 6. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking **No** discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Style Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

1. Click **OK** return to the DE form without saving the changes or closing the window.

Last Updated: 07/15/2003

- 2. The cursor should be positioned in the first, non-populated required field.
- The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default style already exists, a dialog box appears.

- 1. Click Yes to use the current style as the new default, and continue closing the window.
- 2. Click No to keep the existing style as the default, and continue closing the window.

EXTENSION - EDITING THE STYLE CODE

The Style Code field is a text field that appears inside the appropriate HTML code set when the portal is presented. The Style Elements are those that are required for use on the portal for the applicable component (Menu, Header, Content and Footer).

When an element is selected, the text of that element is copied into the **Style Code** field. Selection is carried out using any of the following methods:

- 1. If the Style Element text already exists in the Style Code field, remove it.
- 2. Position the cursor in the Style Code field where you want the code text to appear.
- Highlight a Style Element, and choose Copy (>). The code is copied into the Style Code field at the cursor position.
- **4.** Highlight a **Style Element**, hold the Control key down, select additional **Style Elements**, then click **Copy** (>).
- Click Copy All (>>). This is best down after you have completely cleared the contents of the Style Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Style Element** already exists in the **Style Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal styles as soon as they start rolling them out for departments and clients.
Performance	Opening a style, < 10 seconds. Saving a style, < 10 seconds, including integrity checks. Closing the style window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Styles tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.

Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style
Subordinates	10.2.5 Manage Styles – Print Style Properties 10.2.6 Manage Styles – Deleting Existing Style

10.2.5. Manage Styles – Print Style Properties [Ph3]

Goal in Context	Print the properties of the style to a file or printer, including the Style Code for the Menu, Header, Content and Footer sections.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The style exists. The Style Properties DE form for the style to be printed is open.
Success End Condition	The properties of the style are printed to a file or printer just as they are on the Style Properties DE form.
Failed End Condition	The properties of the style are not printed to a file or printer just as they are on the Style Properties DE form.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal styles are used.
Trigger	The user choose to print the properties of the active style.

STEPS

Use the following procedure to print the listing:

- 1. Click Print.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a **Report Title** to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- 5. Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose **Printer**.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.

- **6.** To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details. The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.

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- 7. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings – General page, where they may change the file name and/or location.
 - ii. After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Style Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style
Subordinates	None.

10.2.6. Manage Styles – Deleting Existing Style [Ph2]

Goal in Context	Delete an existing style.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The style to be deleted exists.
	The style is not used by any active portals, folders, or themes.
	The style to be deleted is either on the Styles listing (Method 1), or the Style Properties DE form for the style to be deleted is open (Method 2).
Success End Condition	The style is deleted and no longer available for use in portals, folders, or themes.
Failed End Condition	The style is not deleted.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal styles are used.
Trigger	Use chooses to delete an existing style that is not longer in use.

STEPS - METHOD 1 (DELETE FROM LISTING)

- **1.** Highlight the style to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - a. To delete the style, click Yes. The dialog box closes and the style is deleted.
 - **b.** To keep the style, click **No**. The dialog box closes, and the style remains on the listing.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- 2. A dialog box appears.
 - a. To delete the style, click Yes. The dialog box and DE form close. The style is deleted, and the Styles listing appears.
 - b. To keep the style, click No. The dialog box closes, and the Style Properties DE form remains open.

EXTENSION - STYLE IN USE

- 1. After choosing to delete the style, the system checks to see if the style is in use by a portal, folder, or theme.
- 2. If the style is in use, a dialog box appears, advising the user the style is in use and cannot be
- Clicking **OK** closes the dialog box and returns the user to the form from which they chose Delete, either the Styles listing or the Style Properties DE form.

Last Updated: 07/15/2003

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Styles tab. Style Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style
Subordinates	None.

10.3. Manage Headers Use Cases

10.3.1. Manage Headers – List Headers [Ph2]

Goal in Context	List available headers defined in Practice Manager for use with portals.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open.
Success End Condition	All available headers are listed.
Failed End Condition	All headers are not listed, even with any filtering removed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal headers are used.
Trigger	User chooses to list headers with the intent of carrying out some management function.

STEPS

- 1. Click on Headers.
- 2. The list of previously defined headers appears in the following state:
 - a. Focus is on the grid, and the first header is selected.
 - **b.** All buttons are enabled.
- 3. Manipulate the listing as needed in order to locate headers:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - c. Hot filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Add new headers.
 - **b.** Copy an existing header, creating a new one in the process.
 - c. Set one of the headers as the default.
 - **d.** Modify existing headers.
 - e. Delete existing headers.
 - f. Print the list of headers.
- Manage General properties, Styles, Footers, Images, Supporting Pages, Themes and Publications as needed.
- 6. When finished, click Close.

EXTENSION - SORT THE LISTING

To sort the listing, carryout either of the following:

- Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION – HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- 2. Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - a. To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

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EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose More columns.

- 1. The Grid Layout Properties window appears in the following state:
 - a. The fields that are currently visible on the grid appear in the Visible Fields listing in the same order from top to bottom that they appear from left to right.
 - b. All is selected in both Table fields.
 - c. The fields that are currently not visible appear in the Available Fields listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.
 - e. The Reset, Save, Apply and Close buttons are enabled.
- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - b. Highlight and drag a field from the Available Fields listing o the Visible Fields listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - d. Highlight a field on the Available Fields listing, hold the Control key down, click on addition fields, and then click Assign (>).
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - Highlight a field on the Visible Field listing, and click Unassign (<).
 - d. Highlight a field on the Visible Field listing, hold the Control key down, click on addition fields, and then click Unassign (<).
 - e. Click Unassign All (<<).
- **4.** Order the columns as needed:
 - To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - b. To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click **Reset**.

- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION – PRINT THE LISTING

Use the following procedure to print the listing:

- 1. Click Print List.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose Printer.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.
- **6.** Modify the layout of the report, as needed, by clickin on the **Custom** tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time **Print List** was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - **b.** Move **Available Fields** to the **Included Fields** listing to add them to the grid.
 - i. Double-click on a field on the Available Fields listing.
 - ii. Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign** (>).
 - v. Click Assign All (>>).
 - **c.** Move **Included Fields** to the **Available Fields** listing to remove them to the grid.
 - i. Double-click on a field on the **Included Fields** listing.
 - Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the **Included Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - v. Click Unassign All (<<).
 - **d.** Order the columns as needed:
 - i. To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.

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- ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- **e.** Sort the list by highlighting a column label in the **Included Fields** listing, and choosing either **Sort Asc(ending)** or **Sort Desc(ending)**.
- 7. To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details. The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- 8. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings – General page, where they may change the file name and/or location.
 - ii. After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Headers.
Channels to Actors	Headers tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.3 Manage Headers Use Cases

10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header 10.3.6 Manage Headers – Deleting Existing Header
10.0.0 Manage Headers Deleting Existing Floader

10.3.2. Manage Headers – Create New Header [Ph2]

Goal in Context	Create a new header that can then be used on a portal home page, folder summary page or theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The Headers listing is active.
Success End Condition	The header is added to the Headers listing, and is available on the Select Headers window.
Failed End Condition	The header is not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal headers are used.
Trigger	Use chooses to create a new header.

STEPS

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- 1. Choose New.
- 2. The Header Properties DE form appears in the following state:
 - a. All fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - c. Close is enabled.
- 3. Enter a Code for the header.
- **4.** Enter a **Description** for the header.
 - a. Save is now enabled.
- 5. If you want this header to be the default, check Set as Default.
- 6. Enter/edit the code in the Header Code field.
- 7. Click Save to save the header.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 8. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.

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Clicking Cancel returns the user to the Header Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default header already exists, a dialog box appears.

- 1. Click Yes to use the current header as the new default, and continue closing the window.
- 2. Click No to keep the existing header as the default, and continue closing the window.

EXTENSION – EDITING THE HEADER CODE

The **Header Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Code Elements** are those that are required for use on the portal.

When an element is selected, the text of that element is copied into the **Header Code** field. Selection is carried out using any of the following methods:

- 1. If the Code Element text already exists in the Header Code field, remove it.
- 2. Position the cursor in the **Header Code** field where you want the code text to appear.
- 3. Highlight a Code Element, and choose Copy (>). The code is copied into the Header Code field at the cursor position.
- **4.** Highlight a **Header Element**, hold the Control key down, select additional **Code Elements**, then click **Copy** (>).
- 5. Click Copy All (>>). This is best down after you have completely cleared the contents of the Header Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Code Element** already exists in the **Header Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal headers as soon as they start rolling them out for departments and clients.
Performance	Opening a header, < 10 seconds. Saving a header, < 10 seconds, including integrity checks. Closing the window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Headers tab.
Open Issues	None.

Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers
Subordinates	10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header 10.3.5 Manage Headers – Print Header Properties 10.3.6 Manage Headers – Deleting Existing Header

10.3.3. Manage Headers – Copy Existing Header [Ph2]

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Goal in Context	Copy a previously created header and save as a new header.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The header to be copied exists.
	The header to be copied is either on the Headers listing (Method 1), or the Header Properties DE form for the header to be copied is open (Method 2).
Success End Condition	The new header is added to the Headers listing, and is available on the Select Headers window.
	The original header is still in tact.
Failed End Condition	The new header is not added.
	The existing header is overwritten.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal headers are used.
Trigger	User chooses to copy an existing header.

STEPS - METHOD 1 (COPY FROM LISTING)

- 1. Highlight the header to copy, and choose Copy.
- 2. The Header Properties DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - **c.** The **Header Code** field is populated with the values from the selected header.
- 3. Enter a Code for the header.
- **4.** Enter a **Description** for the header.
 - a. Save is now enabled.
- 5. If you want this header to be the default, check **Set as Default**.

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- **6.** Modify the code in the **Header Code** field.
- 7. Click Save to save the header.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 8. When finished, click Close.

STEPS - METHOD 2 (SAVE AS FROM DE FORM)

- 9. Choose Save As.
- **10.** The **Save As** DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - **b. OK** is disabled.
 - c. Cancel is enabled.
- 11. Enter a Code for the header.
- **12.** Enter a **Description** for the header.
 - **a. OK** is now enabled.
- 13. If you want this header to be the default, check **Set as Default**.
- 14. Click OK.
- 15. The Header Properties DE form for the original header is closed without saving any changes, even if they existed.
- 16. An updated Header Properties DE form appears in the following state:
 - a. The Code, Description and Set as Default fields populated with the values from the Save As window.
 - b. The Print, Delete, Save As, Save and Close buttons are enabled.
 - **c.** The **Header Code** field is populated with the values from the previously opened header.
- 17. Modify the code in the **Header Code** field.
- 18. Click Save to save the header.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 19. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- 3. Clicking Cancel returns the user to the Header Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- The user can then enter the appropriate information and then attempt to save the record again.

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EXTENSION – DEFAULT EXISTS

If a default header already exists, a dialog box appears.

- 1. Click Yes to use the current header as the new default, and continue closing the window.
- 2. Click No to keep the existing header as the default, and continue closing the window.

EXTENSION - EDITING THE HEADER CODE

The **Header Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Code Elements** are those that are required for use on the portal.

When an element is selected, the text of that element is copied into the **Header Code** field. Selection is carried out using any of the following methods:

- 1. If the Code Element text already exists in the Header Code field, remove it.
- 2. Position the cursor in the **Header Code** field where you want the code text to appear.
- **3.** Highlight a **Code Element**, and choose **Copy (>)**. The code is copied into the **Header Code** field at the cursor position.
- **4.** Highlight a **Header Element**, hold the Control key down, select additional **Code Elements**, then click **Copy** (>).
- 5. Click Copy All (>>). This is best down after you have completely cleared the contents of the Header Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Code Element** already exists in the **Header Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start copying portal headers as soon as they start rolling them out for departments and clients.
Performance	Displaying the Save As window, < 2 seconds.
	Closing the Save As window with OK, < 5 seconds.
	Saving the header, < 10 seconds, including integrity checks.
	Closing the header window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels	Headers tab.
to Actors	Header Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required.
	Phase 2 – Required.
	Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.4 Manage Headers – Modify Existing Header

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10.3.5 Manage Headers – Print Header Properties 10.3.6 Manage Headers – Deleting Existing Header

10.3.4. Manage Headers – Modify Existing Header [Ph2]

Goal in Context	Modify an existing header.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The header to be modified exists. The Headers listing is active.
Success End Condition	Changes to the header are saved.
Failed End Condition	Changes to the header are not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal headers are used.
Trigger	Use chooses to modify an existing header.

STEPS

- 1. Highlight the header to be modifed.
- 2. Choose Open.
- 3. The **Header Properties** DE form appears in the following state:
 - **a.** All fields are populated with the values last saved.
 - **b.** Save is disabled.
 - c. Print, Delete, Save As, and Close are enabled.
- 4. Modify any fields as needed.
 - a. Save is now enabled.
- 5. Click Save to save the header.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 6. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Header Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

1. Click **OK** return to the DE form without saving the changes or closing the window.

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- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default header already exists, a dialog box appears.

- 1. Click Yes to use the current header as the new default, and continue closing the window.
- 2. Click No to keep the existing header as the default, and continue closing the window.

EXTENSION - EDITING THE HEADER CODE

The **Header Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Code Elements** are those that are required for use on the portal.

When an element is selected, the text of that element is copied into the **Header Code** field. Selection is carried out using any of the following methods:

- 1. If the Code Element text already exists in the Header Code field, remove it.
- 2. Position the cursor in the **Header Code** field where you want the code text to appear.
- 3. Highlight a Code Element, and choose Copy (>). The code is copied into the Header Code field at the cursor position.
- 4. Highlight a **Header Element**, hold the Control key down, select additional **Code Elements**, then click **Copy** (>).
- Click Copy All (>>). This is best down after you have completely cleared the contents of the Header Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Code Element** already exists in the **Header Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal headers as soon as they start rolling them out for departments and clients.
Performance	Opening a header, < 10 seconds. Saving a header, < 10 seconds, including integrity checks. Closing the header window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Headers tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header
Subordinates	10.3.5 Manage Headers – Print Header Properties 10.3.6 Manage Headers – Deleting Existing Header

10.3.5. Manage Headers – Print Header Properties [Ph3]

Goal in Context	Print the properties of the header to a file or printer, including the Header Code.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The header exists. The Header Properties DE form for the header to be printed is open.
Success End Condition	The properties of the header are printed to a file or printer just as they are on the Header Properties DE form.
Failed End Condition	The properties of the header are not printed to a file or printer just as they are on the Header Properties DE form.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal headers are used.
Trigger	The user choose to print the properties of the active header.

STEPS

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Use the following procedure to print the listing:

- 1. Click Print.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a **Report Title** to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- 5. Choose a **Print To** destination for the final report:
 - **a.** To print to a printer, choose **Printer**.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.
- **6.** To preview the report before printing or saving, click **Preview**.
 - **a.** The **Report Preview** window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details.

The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.

- 7. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings General page, where they may change the file name and/or location.
 - ii. After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Header Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header
Subordinates	None.

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10.3.6. Manage Headers – Deleting Existing Header [Ph2]

Goal in Context	Delete an existing header.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The header to be deleted exists.
	The header is not used by any active portals, folders, or themes.
	The header to be deleted is either on the Header listing (Method 1), or the Header Properties DE form for the header to be deleted is open (Method 2).
Success End Condition	The header is deleted and no longer available for use in portals, folders, or themes.
Failed End Condition	The header is not deleted.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal headers are used.
Trigger	Use chooses to delete an existing header that is not longer in use.

STEPS - METHOD 1 (DELETE FROM LISTING)

- 1. Highlight the header to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - **a.** To delete the header, click **Yes**. The dialog box closes and the header is deleted.
 - **b.** To keep the header, click **No**. The dialog box closes, and the header remains on the listing.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- 2. A dialog box appears.
 - **a.** To delete the header, click **Yes**. The dialog box and DE form close. The header is deleted, and the **Headers** listing appears.
 - **b.** To keep the header, click **No**. The dialog box closes, and the **Header Properties** DE form remains open.

EXTENSION - HEADER IN USE

- After choosing to delete the header, the system checks to see if the header is in use by a portal, folder, or theme.
- If the header is in use, a dialog box appears, advising the user the header is in use and cannot be deleted.
- 3. Clicking **OK** closes the dialog box and returns the user to the form from which they chose **Delete**, either the **Headers** listing or the **Header Properties** DE form.

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RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Headers tab. Header Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header
Subordinates	None.

10.4. Manage Footers Use Cases

10.4.1. Manage Footers – List Footers [Ph2]

Goal in Context	List available footers defined in Practice Manager for use with portals.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
Success End Condition	All available footers are listed.
Failed End Condition	All footers are not listed, even with any filtering removed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal footers are used.
Trigger	User chooses to list footers with the intent of carrying out some management function.

STEPS

- 1. Click on Footers.
- **2.** The list of previously defined footers appears in the following state:
 - **a.** Focus is on the grid, and the first footer is selected.

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- **b.** All buttons are enabled.
- **3.** Manipulate the listing as needed in order to locate footers:
 - a. Sort the listing.

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- **b.** Modify the grid layout.
- c. Hot filter the listing.
- 4. Proceed with any of the following as needed:
 - a. Add new footers.
 - **b.** Copy an existing footer, creating a new one in the process.
 - c. Set one of the footers as the default.
 - d. Modify existing footers.
 - e. Delete existing footers.
 - Print the list of footers.
- Manage General properties, Styles, Headers, Images, Supporting Pages, Themes and Publications as needed.
- 6. When finished, click Close.

EXTENSION - SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION - HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- **2.** Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - a. To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.

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- To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More** columns.

- 1. The **Grid Layout Properties** window appears in the following state:
 - The fields that are currently visible on the grid appear in the Visible Fields listing in the same order from top to bottom that they appear from left to right.
 - **b.** All is selected in both Table fields.
 - c. The fields that are currently not visible appear in the Available Fields listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.
 - e. The Reset, Save, Apply and Close buttons are enabled.
- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - b. Highlight and drag a field from the Available Fields listing o the Visible Fields listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - d. Highlight a field on the Available Fields listing, hold the Control key down, click on addition fields, and then click Assign (>).
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - Highlight a field on the Visible Field listing, hold the Control key down, click on addition fields, and then click Unassign (<).
 - e. Click Unassign All (<<).
- Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click Reset.
- 8. To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

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EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

1. Click Print List.

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- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose Printer.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.
- 6. Modify the layout of the report, as needed, by clickin on the Custom tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time Print List was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - b. Move Available Fields to the Included Fields listing to add them to the grid.
 - Double-click on a field on the Available Fields listing.
 - Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - v. Click Assign All (>>).
 - c. Move Included Fields to the Available Fields listing to remove them to the grid.
 - i. Double-click on a field on the Included Fields listing.
 - Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the **Included Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - v. Click Unassign All (<<).
 - **d.** Order the columns as needed:
 - i. To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
 - **e.** Sort the list by highlighting a column label in the **Included Fields** listing, and choosing either **Sort Asc(ending)** or **Sort Desc(ending)**.

- **7.** To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details. The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- **8.** To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings – General page, where they may change the file name and/or location.
 - **ii.** After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Footers.
Channels to Actors	Footers tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases
Subordinates	10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.5 Manage Footers – Print Footer Properties 10.4.6 Manage Footers – Deleting Existing Footer

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10.4.2. Manage Footers – Create New Footer [Ph2]

Goal in Context	Create a new footer that can then be used on a portal home page, folder summary page or theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The Footers listing is active.
Success End Condition	The footer is added to the Footers listing, and is available on the Select Footers window.
Failed End Condition	The footer is not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal footers are used.
Trigger	Use chooses to create a new footer.

STEPS

- 1. Choose New.
- 2. The Footer Properties DE form appears in the following state:
 - a. All fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - c. Close is enabled.
- 3. Enter a Code for the footer.
- 4. Enter a **Description** for the footer.
 - a. Save is now enabled.
- 5. If you want this footer to be the default, check Set as Default.
- 6. Enter/edit the code in the Footer Code field.
- 7. Click Save to save the footer.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- **8.** When finished, click **Close**.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Footer Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

1. Click **OK** return to the DE form without saving the changes or closing the window.

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- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default footer already exists, a dialog box appears.

- 1. Click Yes to use the current footer as the new default, and continue closing the window.
- 2. Click No to keep the existing footer as the default, and continue closing the window.

EXTENSION - EDITING THE FOOTER CODE

The **Footer Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Code Elements** are those that are required for use on the portal.

When an element is selected, the text of that element is copied into the **Footer Code** field. Selection is carried out using any of the following methods:

- 1. If the Code Element text already exists in the Footer Code field, remove it.
- 2. Position the cursor in the Footer Code field where you want the code text to appear.
- Highlight a Code Element, and choose Copy (>). The code is copied into the Footer Code field at the cursor position.
- **4.** Highlight a **Footer Element**, hold the Control key down, select additional **Code Elements**, then click **Copy** (>).
- Click Copy All (>>). This is best down after you have completely cleared the contents of the Footer Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Code Element** already exists in the **Footer Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal footers as soon as they start rolling them out for departments and clients.
Performance	Opening a footer, < 10 seconds. Saving a footer, < 10 seconds, including integrity checks. Closing the window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Footers tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management	N/A

Information.	
Superordinates	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers
Subordinates	10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 10.4.5 Manage Footers – Print Footer Properties 10.4.6 Manage Footers – Deleting Existing Footer

10.4.3. Manage Footers – Copy Existing Footer [Ph2]

Goal in Context	Copy a previously created footer and save as a new footer.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The footer to be copied exists.
	The footer to be copied is either on the Footers listing (Method 1), or the Footer Properties DE form for the footer to be copied is open (Method 2).
Success End Condition	The new footer is added to the Footers listing, and is available on the Select Footers window.
	The original footer is still in tact.
Failed End Condition	The new footer is not added.
	The existing footer is overwritten.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal footers are used.
Trigger	User chooses to copy an existing footer.

STEPS - METHOD 1 (COPY FROM LISTING)

- **1.** Highlight the footer to copy, and choose **Copy**.
- 2. The Footer Properties DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - **c.** The **Footer Code** field is populated with the values from the selected footer.
- 3. Enter a Code for the footer.
- **4.** Enter a **Description** for the footer.
 - a. Save is now enabled.
- **5.** If you want this footer to be the default, check **Set as Default**.
- **6.** Modify the code in the **Footer Code** field.

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- 7. Click Save to save the footer.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 8. When finished, click Close.

STEPS - METHOD 2 (SAVE AS FROM DE FORM)

- 9. Choose Save As.
- **10.** The **Save As** DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - **b. OK** is disabled.
 - c. Cancel is enabled.
- 11. Enter a Code for the footer.
- **12.** Enter a **Description** for the footer.
 - a. OK is now enabled.
- 13. If you want this footer to be the default, check **Set as Default**.
- 14. Click OK.
- 15. The Footer Properties DE form for the original footer is closed without saving any changes, even if they existed.
- **16.** An updated **Footer Properties** DE form appears in the following state:
 - a. The Code, Description and Set as Default fields populated with the values from the Save As window.
 - **b.** The **Print**, **Delete**, **Save As**, **Save** and **Close** buttons are enabled.
 - c. The Footer Code field is populated with the values from the previously opened footer.
- 17. Modify the code in the Footer Code field.
- 18. Click Save to save the footer.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 19. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Footer Properties window without saving or discarding the changes.

EXTENSION – REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- 3. The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default footer already exists, a dialog box appears.

1. Click Yes to use the current footer as the new default, and continue closing the window.

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2. Click No to keep the existing footer as the default, and continue closing the window.

EXTENSION – EDITING THE FOOTER CODE

The **Footer Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Code Elements** are those that are required for use on the portal.

When an element is selected, the text of that element is copied into the **Footer Code** field. Selection is carried out using any of the following methods:

- 1. If the Code Element text already exists in the Footer Code field, remove it.
- 2. Position the cursor in the Footer Code field where you want the code text to appear.
- 3. Highlight a Code Element, and choose Copy (>). The code is copied into the Footer Code field at the cursor position.
- **4.** Highlight a **Footer Element**, hold the Control key down, select additional **Code Elements**, then click **Copy** (>).
- Click Copy All (>>). This is best down after you have completely cleared the contents of the Footer Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Code Element** already exists in the **Footer Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start copying portal footers as soon as they start rolling them out for departments and clients.
Performance	Displaying the Save As window, < 2 seconds. Closing the Save As window with OK, < 5 seconds. Saving the footer, < 10 seconds, including integrity checks. Closing the footer window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Footers tab. Footer Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.4 Manage Footers – Modify Existing Footer

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10.4.4. Manage Footers – Modify Existing Footer [Ph2]

Goal in Context	Modify an existing footer.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The footer to be modified exists. The Footers listing is active.
Success End Condition	Changes to the footer are saved.
Failed End Condition	Changes to the footer are not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal footers are used.
Trigger	Use chooses to modify an existing footer.

STEPS

- **1.** Highlight the footer to be modifed.
- 2. Choose Open.
- 3. The Footer Properties DE form appears in the following state:
 - **a.** All fields are populated with the values last saved.
 - **b.** Save is disabled.
 - c. Print, Delete, Save As, and Close are enabled.
- 4. Modify any fields as needed.
 - a. Save is now enabled.
- 5. Click Save to save the footer.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 6. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Footer Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

1. Click **OK** return to the the DE form without saving the changes or closing the window.

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- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default footer already exists, a dialog box appears.

- 1. Click Yes to use the current footer as the new default, and continue closing the window.
- 2. Click No to keep the existing footer as the default, and continue closing the window.

EXTENSION - EDITING THE FOOTER CODE

The **Footer Code** field is a text field that appears inside the appropriate HTML code set when the portal is presented. The **Code Elements** are those that are required for use on the portal.

When an element is selected, the text of that element is copied into the **Footer Code** field. Selection is carried out using any of the following methods:

- 1. If the Code Element text already exists in the Footer Code field, remove it.
- 2. Position the cursor in the Footer Code field where you want the code text to appear.
- Highlight a Code Element, and choose Copy (>). The code is copied into the Footer Code field at the cursor position.
- **4.** Highlight a **Footer Element**, hold the Control key down, select additional **Code Elements**, then click **Copy** (>).
- Click Copy All (>>). This is best down after you have completely cleared the contents of the Footer Code field, but is not carried out programmatically.

Developer Note – If we elect to store this information in XML format, it would be possible to check and see if a **Code Element** already exists in the **Footer Code** field, and then give the user the option of replacing it with the default value. If this is the case, let me know and I will provide the necessary dialog box, and amend this use case.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal footers as soon as they start rolling them out for departments and clients.
Performance	Opening a footer, < 10 seconds. Saving a footer, < 10 seconds, including integrity checks. Closing the footer window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Footers tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

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Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer
Subordinates	10.4.5 Manage Footers – Print Footer Properties 10.4.6 Manage Footers – Deleting Existing Footer

10.4.5. Manage Footers – Print Footer Properties [Ph3]

Goal in Context	Print the properties of the footer to a file or printer, including the Footer Code.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The footer exists. The Footer Properties DE form for the footer to be printed is open.
Success End Condition	The properties of the footer are printed to a file or printer just as they are on the Footer Properties DE form.
Failed End Condition	The properties of the footer are not printed to a file or printer just as they are on the Footer Properties DE form.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal footers are used.
Trigger	The user choose to print the properties of the active footer.

STEPS

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Use the following procedure to print the listing:

- 1. Click Print.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - **a.** To print to a printer, choose **Printer**.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.
- **6.** To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details.

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The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.

- 7. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- b. If the destination is File, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings General page, where they may change the file name and/or location.
 - ii. After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Footer Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer
Subordinates	None.

10.4.6. Manage Footers – Deleting Existing Footer [Ph2]

Goal in Context	Delete an existing footer.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The footer to be deleted exists.
	The footer is not used by any active portals, folders, or themes.
	The footer to be deleted is either on the Footer listing (Method 1), or the Footer Properties DE form for the footer to be deleted is open (Method 2).
Success End Condition	The footer is deleted and no longer available for use in portals, folders, or themes.
Failed End Condition	The footer is not deleted.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal footers are used.
Trigger	Use chooses to delete an existing footer that is not longer in use.

STEPS - METHOD 1 (DELETE FROM LISTING)

- 1. Highlight the footer to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - **a.** To delete the footer, click **Yes**. The dialog box closes and the footer is deleted.
 - **b.** To keep the footer, click **No**. The dialog box closes, and the footer remains on the listing.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- **2.** A dialog box appears.
 - a. To delete the footer, click Yes. The dialog box and DE form close. The footer is deleted, and the Footers listing appears.
 - **b.** To keep the footer, click **No**. The dialog box closes, and the **Footer Properties** DE form remains open.

EXTENSION – FOOTER IN USE

- 1. After choosing to delete the footer, the system checks to see if the footer is in use by a portal, folder, or theme.
- 2. If the footer is in use, a dialog box appears, advising the user the footer is in use and cannot be deleted.
- 3. Clicking **OK** closes the dialog box and returns the user to the form from which they chose **Delete**, either the **Footers** listing or the **Footer Properties** DE form.

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RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Footers tab. Footer Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer
Subordinates	None.

10.5. Manage Image Settings Use Cases

10.5.1. Manage Image Settings – List Image Groups [Ph2]

Goal in Context	List available image groups defined in Practice Manager for use with portals.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open to the Images page.
Success End Condition	All available image groups are listed.
Failed End Condition	All image groups are not listed, even with any filtering removed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal image groups are used.
Trigger	User chooses to list image groups with the intent of carrying out some management function.

STEPS

- 1. Click on Groups.
- 2. The list of previously defined image groups appears in the following state:
 - a. Focus is on the grid, and the first image group is selected.
 - b. All buttons are enabled.
- **3.** Manipulate the listing as needed in order to locate image groups:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - **c.** Hot filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Add new image groups.
 - **b.** Copy an existing image group, creating a new one in the process.
 - **c.** Set one of the image groups as the default.
 - **d.** Modify existing image groups.
 - e. Delete existing image groups.
 - Print the list of image groups.
- 5. Manage General properties, Styles, Headers, Images, Supporting Pages, Themes and Publications as needed.
- 6. Manage Images as needed.
- 7. Assign images to image groups as needed.
- 8. When finished, click Close.

EXTENSION – SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - a. If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - b. If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - c. If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either Sort Ascending or Sort Decsending from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION – HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- 2. Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is

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dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- **3.** To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More columns**.

- 1. The Grid Layout Properties window appears in the following state:
 - **a.** The fields that are currently visible on the grid appear in the **Visible Fields** listing in the same order from top to bottom that they appear from left to right.
 - b. All is selected in both Table fields.
 - c. The fields that are currently not visible appear in the Available Fields listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - e. The Reset, Save, Apply and Close buttons are enabled.
- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - b. Highlight and drag a field from the Available Fields listing o the Visible Fields listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- 4. Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - b. To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).

- 6. To save the settings, click Save.
- 7. To reset the grid settings to the last saved configuration, click Reset.
- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

1. Click Print List.

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- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose Printer.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.
- **6.** Modify the layout of the report, as needed, by clickin on the **Custom** tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time **Print List** was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - **b.** Move **Available Fields** to the **Included Fields** listing to add them to the grid.
 - i. Double-click on a field on the Available Fields listing.
 - Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign** (>).
 - v. Click Assign All (>>).
 - Move Included Fields to the Available Fields listing to remove them to the grid.
 - Double-click on a field on the Included Fields listing.
 - Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the Included Field listing, hold the Control key down, click on addition fields, and then click Unassign (<).
 - v. Click Unassign All (<<).

- **d.** Order the columns as needed:
 - i. To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.

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- ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- e. Sort the list by highlighting a column label in the Included Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- 7. To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details. The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- 8. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings – General page, where they may change the file name and/or location.
 - **ii.** After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Image Groups.
Channels to Actors	Images page – Groups tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required.

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	Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases
Subordinates	10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group 10.5.4 Manage Image Settings – Deleting Existing Image Group 10.5.9 Manage Image Settings – Assign Images to Image Groups

10.5.2. Manage Image Settings – Create New Image Group [Ph2]

Goal in Context	Create a new image group that can then be used on a portal home page, folder summary page or theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The Groups listing is active.
Success End Condition	The image group is added to the Groups listing, and is available on the Select Image Groups window.
Failed End Condition	The image group is not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal image groups are used.
Trigger	Use chooses to create a new image group.

STEPS

- 1. Choose New.
- 2. The Image Group Properties DE form appears in the following state:
 - a. All fields are null.
 - b. Delete, Save As, and Save are disabled.
 - c. Close is enabled.
- 3. Enter a Code for the image group.
- **4.** Enter a **Description** for the image group.
 - a. Save is now enabled.
- 5. If you want this image group to be the default, check **Set as Default**.
- 6. Click Save to save the image group.
 - a. Save is disabled.
 - b. Delete, Save As, and Close are enabled.
- 7. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- **2.** Clicking **No** discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Image Group Properties window without saving or discarding the changes.

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EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default image group already exists, a dialog box appears.

- Click Yes to use the current image group as the new default, and continue closing the window.
- 2. Click No to keep the existing image group as the default, and continue closing the window.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal image groups as soon as they start rolling them out for departments and clients.
Performance	Opening an image group, < 5 seconds. Saving an image group, < 5 seconds, including integrity checks. Closing the window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Images Page – Image Groups tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups
Subordinates	10.5.3 Manage Image Settings – Modify Existing Image Group 10.5.4 Manage Image Settings – Deleting Existing Image Group 10.5.9 Manage Image Settings – Assign Images to Image Groups

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10.5.3. Manage Image Settings – Modify Existing Image Group [Ph2]

Goal in Context	Modify an existing image group.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The image group to be modified exists.
	The Groups listing is active.
Success End Condition	Changes to the image group are saved.
Failed End Condition	Changes to the image group are not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal image groups are used.
Trigger	Use chooses to modify an existing image group.

STEPS

- 1. Highlight the image group to be modifed.
- 2. Choose Open.
- 3. The Image Group Properties DE form appears in the following state:
 - a. All fields are populated with the values last saved.
 - b. Save is disabled.
 - c. Delete, Save As, and Close are enabled.
- 4. Modify any fields as needed.
 - a. Save is now enabled.
- 5. Click Save to save the image group.
 - a. Save is disabled.
 - b. Delete, Save As, and Close are enabled.
- 6. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Image Group Properties window without saving or discarding the changes.

EXTENSION – REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default image group already exists, a dialog box appears.

- Click Yes to use the current image group as the new default, and continue closing the window.
- 2. Click No to keep the existing image group as the default, and continue closing the window.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal image groups as soon as they start rolling them out for departments and clients.
Performance	Opening an image group, < 5 seconds. Saving an image group, < 5 seconds, including integrity checks. Closing the image group window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Images page - Groups tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group
Subordinates	10.5.4 Manage Image Settings – Deleting Existing Image Group 10.5.9 Manage Image Settings – Assign Images to Image Groups

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10.5.4. Manage Image Settings – Deleting Existing Image Group [Ph2]

Goal in Context	Delete an existing image group.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The image group to be deleted exists.
	The image group is not used by any active portals, folders, or themes.
	The image group to be deleted is either on the Groups listing (Method 1), or the Image Groups Properties DE form for the image group to be deleted is open (Method 2).
Success End Condition	The image group is deleted and no longer available for use in portals, folders, or themes.
Failed End Condition	The image group is not deleted.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal image groups are used.
Trigger	Use chooses to delete an existing image group that is not longer in use.

STEPS - METHOD 1 (DELETE FROM LISTING)

- 1. Highlight the image group to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - a. To delete the image group, click Yes. The dialog box closes and the image group is deleted.
 - **b.** To keep the image group, click **No**. The dialog box closes, and the image group remains on the listing.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- 2. A dialog box appears.
 - **a.** To delete the image group, click **Yes**. The dialog box and DE form close. The image group is deleted, and the **Groups** listing appears.
 - **b.** To keep the image group, click **No**. The dialog box closes, and the **Image Group Properties** DE form remains open.

EXTENSION - IMAGE GROUP IN USE

- 1. After choosing to delete the image group, the system checks to see if the image group is in use by a portal, folder, or theme.
- 2. If the image group is in use, a dialog box appears, advising the user the image group is in use and cannot be deleted.
- 3. Clicking **OK** closes the dialog box and returns the user to the form from which they chose **Delete**, either the **Groups** listing or the **Image Group Properties** DE form.

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RELATED INFORMATION

Priority	Low.
Performance	< 5 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Images page - Groups tab. Image Group Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group
Subordinates	None.

10.5.5. Manage Image Settings – List Images [Ph2]

Goal in Context	List available images defined in Practice Manager for use with portals.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open to the Images page.
Success End Condition	All available images are listed.
Failed End Condition	All images are not listed, even with any filtering removed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal images are used.
Trigger	User chooses to list images with the intent of carrying out some management function.

STEPS

- 1. Click on Images.
- 2. The list of previously defined images appears in the following state:
 - **a.** Focus is on the grid, and the first image is selected.
 - **b.** All buttons are enabled.

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- **3.** Manipulate the listing as needed in order to locate images:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - **c.** Hot filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Add new images.
 - **b.** Copy an existing image, creating a new one in the process.
 - c. Set one of the images as the default.
 - **d.** Modify existing images.
 - e. Delete existing images.
 - f. Print the list of images.
- Manage General properties, Styles, Headers, Images, Supporting Pages, Themes and Publications as needed.
- 6. Manage Image Groups as needed.
- 7. Assign images to image groups as needed.
- 8. When finished, click Close.

EXTENSION - SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION - HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- 2. Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - a. To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

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To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- **3.** To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More columns**.

- 1. The Grid Layout Properties window appears in the following state:
 - **a.** The fields that are currently visible on the grid appear in the **Visible Fields** listing in the same order from top to bottom that they appear from left to right.
 - **b.** All is selected in both Table fields.
 - **c.** The fields that are currently not visible appear in the **Available Fields** listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - e. The Reset, Save, Apply and Close buttons are enabled.
- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - **b.** Highlight and drag a field from the **Available Fields** listing o the **Visible Fields** listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- 4. Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - **b.** To move a column to the right in the grid, highlight the column label in the **Visible Fields** listing, an choose **Move Down**. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click **Reset**.

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- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

- 1. Click Print List.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose Printer.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.
- **6.** Modify the layout of the report, as needed, by clickin on the **Custom** tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time **Print List** was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - **b.** Move **Available Fields** to the **Included Fields** listing to add them to the grid.
 - i. Double-click on a field on the Available Fields listing.
 - ii. Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign** (>).
 - v. Click Assign All (>>).
 - **c.** Move **Included Fields** to the **Available Fields** listing to remove them to the grid.
 - i. Double-click on a field on the Included Fields listing.
 - Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the **Included Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - v. Click Unassign All (<<).

- **d.** Order the columns as needed:
 - i. To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.

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- ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- e. Sort the list by highlighting a column label in the Included Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- 7. To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details. The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- **8.** To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings – General page, where they may change the file name and/or location.
 - **ii.** After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Images.
Channels to Actors	Images page – Images tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.

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Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases
Subordinates	10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image 10.5.9 Manage Image Settings – Assign Images to Image Groups

10.5.6. Manage Image Settings – Create New Image [Ph2]

Goal in Context	Create a new image that can then be used on a portal home page, folder summary page or theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The Images listing is active.
Success End Condition	The image is added to the Groups listing, and is available on the Select Images window.
Failed End Condition	The image is not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal images are used.
Trigger	Use chooses to create a new image.

STEPS

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- 1. Choose New.
- 2. The Image Properties DE form appears in the following state:
 - a. All fields are null.
 - b. Delete, Save As, and Save are disabled.
 - c. Close is enabled.
- 3. Enter a Code for the image.
- 4. Enter a **Description** for the image.
- **5.** Choose an **Icon** version of the image.
- **6.** Choose a **Small Logo** version of the image.
- **7.** Choose a **Medium Logo** version of the image.
- **8.** Choose a **Large Logo** version of the image.
- 9. Choose a Background version of the image.
 - a. Save is now enabled.
- 10. If you want this image to be the default, check Set as Default.

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- 11. Click Save to save the image.
 - a. Save is disabled.
 - b. Delete, Save As, and Close are enabled.
- 12. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Image Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- 3. The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default image already exists, a dialog box appears.

- 1. Click Yes to use the current image as the new default, and continue closing the window.
- 2. Click No to keep the existing image as the default, and continue closing the window.

EXTENSION – CHOOSE IMAGE FILE

Use the following procedure to select the image file for any of the five image version fields.

- 1. Click on the look-up button immediately to the right of the field.
- **2.** The **Find File** dialog appears in the following state:
 - a. The Look in field defaults to the root Practice Manager folder.
 - b. The File name field is Null.
 - c. The Files of type defaults to All picture files.
 - d. The Select button is disabled.
 - e. The Cancel button is enabled.
- Using the Look in field and toolbar, navigate to the folder containing the image file you want to use.
- 4. If needed, change the Files of type field to display more or fewer files.
- 5. On the listing, click on the file to populate the File name field.
- 6. Click Select.
- 7. The file is added to the corresponding image version field.

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RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal images as soon as they start rolling them out for departments and clients.
Performance	Opening an image, < 5 seconds. Saving an image, < 15 seconds, including integrity checks. Closing the window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Images Page – Images tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups
Subordinates	10.5.3 Manage Image Settings – Modify Existing Image Group 10.5.4 Manage Image Settings – Deleting Existing Image Group 10.5.9 Manage Image Settings – Assign Images to Image Groups

10.5.7. Manage Image Settings – Modify Existing Image [Ph2]

Goal in Context	Modify an existing image.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The image is existing. The Images listing is active.
Success End Condition	The changes to the image are saved.
Failed End Condition	The changes to the image are not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal images are used.
Trigger	Use chooses to modify an existing image.

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STEPS

- 1. Highlight the image to modify.
- 2. Choose Open.
- 3. The Image Properties DE form appears in the following state:
 - a. All fields are populated with the values from the last time the image was saved.
 - b. Save is disabled.
 - c. Print, Delete, Save As, and Close buttons are disabled.
- **4.** Modify any of the fields on the form.
 - a. Save is now enabled.
- 5. Click Save to save the image.
 - a. Save is disabled.
 - b. Delete, Save As, and Close are enabled.
- 6. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Image Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default image already exists, a dialog box appears.

- 1. Click Yes to use the current image as the new default, and continue closing the window.
- 2. Click No to keep the existing image as the default, and continue closing the window.

EXTENSION - CHOOSE IMAGE FILE

Use the following procedure to select the image file for any of the five image version fields.

- 1. Click on the look-up button immediately to the right of the field.
- **2.** The **Find File** dialog appears in the following state:
 - a. The Look in field defaults to the root Practice Manager folder.
 - b. The File name field is Null.
 - c. The Files of type defaults to All picture files.
 - d. The Select button is disabled.
 - e. The Cancel button is enabled.

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- **3.** Using the Look in field and toolbar, navigate to the folder containing the image file you want to use.
- **4.** If needed, change the **Files of type** field to display more or fewer files.
- **5.** On the listing, click on the file to populate the **File name** field.
- 6. Click Select.
- 7. The file is added to the corresponding image version field.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal images as soon as they start rolling them out for departments and clients.
Performance	Opening an image, < 5 seconds. Saving an image, < 15 seconds, including integrity checks. Closing the window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Images Page – Images tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.6 Manage Image Settings – Create New Image
Subordinates	10.5.4 Manage Image Settings – Deleting Existing Image Group 10.5.9 Manage Image Settings – Assign Images to Image Groups

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Manage Image Settings – Deleting Existing Image [Ph2] 10.5.8.

Goal in Context	Delete an existing image.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The image to be deleted exists. The image is not used by any active portals, folders, or themes. The image to be deleted is either on the Images listing (Method 1), or the Images Properties DE form for the image to be deleted is open (Method 2).
Success End Condition	The image is deleted and no longer available for use in portals, folders, or themes.
Failed End Condition	The image is not deleted.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal images are used.
Trigger	Use chooses to delete an existing image that is not longer in use.

STEPS - METHOD 1 (DELETE FROM LISTING)

- 1. Highlight the image to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - **a.** To delete the image, click **Yes**. The dialog box closes and the image is deleted.
 - b. To keep the image, click No. The dialog box closes, and the image remains on the

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- 2. A dialog box appears.
 - a. To delete the image, click Yes. The dialog box and DE form close. The image is deleted, and the Groups listing appears.
 - b. To keep the image, click No. The dialog box closes, and the Image Properties DE form remains open.

EXTENSION - IMAGE IN USE

- After choosing to delete the image, the system checks to see if the image is in use by a portal, folder, or theme.
- If the image is in use, a dialog box appears, advising the user the image is in use and cannot be deleted.
- 3. Clicking OK closes the dialog box and returns the user to the form from which they chose **Delete**, either the **Groups** listing or the **Image Properties** DE form.

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RELATED INFORMATION

Priority	Low.
Performance	< 5 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Images page – Images tab. Image Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.6 Manage Image Settings – Create New Image 10.5.3 Manage Image Settings – Modify Existing Image Group
Subordinates	None.

10.5.9. Manage Image Settings – Assign Images to Image Groups [Ph2]

Goal in Context	Assign images to image groups.
Scope & Level	Portal Settings.
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved. The Portal Settings window is open.
	The image to be assigned exists.
	The image group to be assigned to exists.
	The Images page is active.
Success End Condition	The image is assigned to the group. When the Select Image list is filtered by an image group, the image appears on the list.
Failed End Condition	The image is not assigned to the group.
	When the Select Image list is filtered by an image group, the image does not appear on the list.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal images are used.
Trigger	The user chooses to assign an existing image to an existing image group.

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STEPS FOR METHOD 1 - ASSIGN IMAGES TO GROUPS

- 1. Click on the Assign Images tab. The assignment window appears in the following state:
 - a. The Image Group field is active, and null.
 - **b.** The **All** button is not selected.
 - c. The Available Images and Assigned Images listings are empty.
 - **d.** The **Listing** and assignment buttons (>, >>, <, and <<) are disabled.
- 2. Choose an existing Image Group, or click All to make the assignment to all image groups.
 - a. The Available Images listing is freshed to display all images not assigned to the selected image groups, or not assigned in all image groups, whichever was selected in the previous step.
 - **b.** The **Assigned Images** listing is freshed to display all images that are assigned to the selected image groups, or are assigned to all image groups, whichever was selected in the previous step.
 - c. The Listing, Assign All (>>), and Unassign All (<<) buttons are enabled.
 - d. The Assign (>) and Unassign (<) buttons are disabled until one or more images are selected in the Available Images or Assigned Images listings respectively.</p>
- 3. Manipulate the listings as needed in order to locate images:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - c. Hot filter the listing.
- **4.** Assign images using one of the following methods:
 - a. In the Available Images listing, double-click on the image.
 - b. In the Available Images listing, highlight an image and drag it to the Assigned Images listing.
 - c. In the Available Images listing, highlight an image and click Assign (>).
 - **d.** In the **Available Images** listing, highlight an image, hold the **Control** key down, highlight additional images, and then drag them to the **Assigned Images** listing.
 - e. In the Available Images listing, highlight an image, hold the Control key down, highlight additional images, and then and click Assign (>).
 - Click Assign All (>>) to assign all images.
- **5.** Unassign images using one of the following methods:
 - a. In the Assigned Images listing, double-click on the image.
 - b. In the Assigned Images listing, highlight an image and drag it to the Available Images listing.
 - **c.** In the **Assigned Images** listing, highlight an image and click **Unssign (<)**.
 - **d.** In the **Assigned Images** listing, highlight an image, hold the **Control** key down, highlight additional images, and then drag them to the **Available Images** listing.
 - e. In the **Assigned Images** listing, highlight an image, hold the **Control** key down, highlight additional images, and then and click **Unassign** (<).
 - f. Click Unassign All (<<) to assign all images.

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STEPS FOR METHOD 2 - ASSIGN GROUPS TO IMAGES (REVERSE ASSIGNMENT)

- 1. Click on the **Assign Groups** tab. The assignment window appears in the following state:
 - The Image field is active, and null.
 - **b.** The **All** button is not selected.
 - c. The Available Groups and Assigned Groups listings are empty.
 - **d.** The **Listing** and assignment buttons (>, >>, <, and <<) are disabled.
- 2. Choose an existing Image, or click All to make the assignment to all image groups.
 - a. The Available Groups listing is freshed to display all image groups not assigned to the selected images, or not assigned in all images, whichever was selected in the previous step.
 - b. The Assigned Groups listing is freshed to display all image groups that are assigned to the selected images, or are assigned to all images, whichever was selected in the previous step.
 - **c.** The **Listing**, **Assign All (>>)**, and **Unassign All (<<)** buttons are enabled.
 - d. The Assign (>) and Unassign (<) buttons are disabled until one or more images are selected in the Available Groups or Assigned Groups listings respectively.
- 3. Manipulate the listings as needed in order to locate image groups:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - c. Hot filter the listing.
- **4.** Assign image groups using one of the following methods:
 - a. In the Available Groups listing, double-click on the image group.
 - b. In the Available Groups listing, highlight an image group and drag it to the Assigned Groups listing.
 - c. In the Available Groups listing, highlight an image group and click Assign (>).
 - d. In the Available Groups listing, highlight an image group, hold the Control key down, highlight additional image groups, and then drag them to the Assigned Groups listing.
 - e. In the Available Groups listing, highlight an image group, hold the Control key down, highlight additional image groups, and then and click Assign (>).
 - Click Assign All (>>) to assign all image groups.
- **5.** Unassign image groups using one of the following methods:
 - **a.** In the **Assigned Groups** listing, double-click on the image group.
 - b. In the Assigned Groups listing, highlight an image group and drag it to the Available Groups listing.
 - c. In the Assigned Groups listing, highlight an image group and click Unssign (<).
 - **d.** In the **Assigned Groups** listing, highlight an image group, hold the **Control** key down, highlight additional image groups, and then drag them to the **Available Groups** listing.
 - e. In the Assigned Groups listing, highlight an image group, hold the Control key down, highlight additional image groups, and then and click Unassign (<).</p>
 - f. Click Unassign All (<<) to assign all image groups.

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EXTENSION – SELECT IMAGE GROUPS

1. Click on the lookup button to the right of the **Image Groups** field.

Use the following procedure to choose one or more image groups for assignment:

- 2. The Select Image Groups window appears in the following state:
 - a. All previously selected image groups appear in the Selected Image Groups listing.
 - **b.** All other image groups appear in the **Available Image Groups** listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - **d.** The **Apply** and **Close** buttons are enabled.
- Move Available Image Groups to the Select Image Groups listing to add them to the assignment.
 - a. Double-click on an image group on the Available Image Groups listing.
 - b. Highlight and drag an image group from the Available Image Groups listing to the Select Image Groups listing.
 - **c.** Highlight an image group on the **Available Image Groups** listing, and click **Assign (>)**.
 - **d.** Highlight an image group on the **Available Image Groups** listing, hold the **Control** key down, highlight addition image groups, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- Move Select Image Groups to the Available Image Groups listing to remove them to the assignment.
 - a. Double-click on an image group on the Select Image Groups listing.
 - b. Highlight and drag an image group from the Select Image Groups listing o the Available Image Groups listing.
 - c. Highlight an image group on the Select Image Groups listing, and click Unassign (<).
 - **d.** Highlight an image group on the **Select Image Groups** listing, hold the **Control** key down, highlight addition image groups, and then click **Unassign (<)**.
 - e. Click Unassign All (<<).
- Click Apply to populate the Image Groups field with the selections in the Select Image Groups listing.

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EXTENSION - SELECT IMAGES

Use the following procedure to choose one or more images for assignment:

- 1. Click on the lookup button to the right of the **Images** field.
- **2.** The **Select Images** window appears in the following state:
 - a. All previously selected images appear in the Selected Images listing.
 - **b.** All other images appear in the **Available Images** listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - **d.** The **Apply** and **Close** buttons are enabled.
- 3. Move Available Images to the Select Images listing to add them to the assignment.
 - a. Double-click on an image on the Available Images listing.
 - **b.** Highlight and drag an image from the **Available Images** listing to the **Select Images** listing.
 - **c.** Highlight an image on the **Available Images** listing, and click **Assign** (>).
 - **d.** Highlight an image on the **Available Images** listing, hold the **Control** key down, highlight addition images, and then click **Assign** (>).
 - e. Click Assign All (>>).
- 4. Move Select Images to the Available Images listing to remove them to the assignment.
 - Double-click on an image on the Select Images listing.
 - b. Highlight and drag an image from the Select Images listing o the Available Images listing.
 - **c.** Highlight an image on the **Select Images** listing, and click **Unassign (<)**.
 - **d.** Highlight an image on the **Select Images** listing, hold the **Control** key down, highlight addition images, and then click **Unassign (<)**.
 - e. Click Unassign All (<<).
- 5. Click Apply to populate the Images field with the selections in the Select Images listing.

EXTENSION - SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - C. If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

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EXTENSION – HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- 2. Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - **a.** To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- **3.** To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More columns**.

- 1. The Grid Layout Properties window appears in the following state:
 - **a.** The fields that are currently visible on the grid appear in the **Visible Fields** listing in the same order from top to bottom that they appear from left to right.
 - **b.** All is selected in both Table fields.
 - c. The fields that are currently not visible appear in the Available Fields listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - e. The Reset, Save, Apply and Close buttons are enabled.
- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - b. Highlight and drag a field from the Available Fields listing o the Visible Fields listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).

- e. Click Unassign All (<<).
- 4. Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.

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- b. To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click Reset.
- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

RELATED INFORMATION

Priority	Medium
Performance	Opening the assignment window < 2 seconds
	Making a 1-to-1 assignment < 2 seconds
	Making a 1-to-many assignment < 2 seconds
	Making a 1-to-all assignment < 3 seconds
	Making a many-to-1 assignment < 2 seconds
	Making a many-to-many assignment < 5 seconds
	Making a many-to-all assignment < 5 seconds
	Making an all-to-all assignment < 10 seconds
Frequency	Often at initial configuration.
	Rarely after that.
Channels to Actors	Portal Settings – Images page
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	None.
Superordinates	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.6 Manage Image Settings – Create New Image 10.5.3 Manage Image Settings – Modify Existing Image Group
Subordinates	10.5.10 Manage Image Settings – List Image Assignments

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10.5.10. Manage Image Settings – List Image Assignments [Ph3]

Goal in Context	List image assignments to image groups.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open to the Images page, with either the Assign Images or Assign Groups tabs active.
Success End Condition	The assignment list is displayed. The list is printed to a file or printer.
Failed End Condition	The assignment listing is not displayed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal images are used.
Trigger	User chooses to list image assignments.

STEPS

- 1. Click listing.
- 2. The Image Group Assignment Listing appears in the following state:
 - a. If the window was opened from the Assign Images tab, all existing assignments for the image groups selected in the Image Group field appear (prefiltered). If AII was selected in the Image Group field, the list is not filtered.
 - b. If the window was opened from the Assign Groups tab, all existing assignments for the images selected in the Images field appear (prefiltered). If AII was selected in the Image field, the list is not filtered.
 - c. Focus is on the grid, and the first assignment is selected.
 - d. All buttons are enabled.
- 3. Manipulate the listing as needed in order to locate images:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - c. Hot filter the listing.
 - d. Filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Remove assignments.
 - **b.** Print the list of images.
- 5. When finished, click Close.

EXTENSION - SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.

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- **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
- **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION - HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- 2. Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - a. To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION – FILTER THE LISTING

To filter the listing by one or more image groups or images, carry out the following procedure:

- 1. Choose Filter.
- 2. The Image Group Assignment Filter window appears in the following state:
 - **a.** Existing filter criteria populates the fields. This may be from a previously applied filter, or the values selected on the active assignment tab.
 - **b.** All buttons are enabled.
- Choose one or more Image Groups on which to filter the listing, or leave blank to ignore image groups as a filter criteria.
- **4.** Choose one or more **Images** on which to filter the listing, or leave blank to ignore images as a filter criteria.
- 5. Click Apply.
- 6. The Image Group Assignment Listing appears filtered using the criteria entered.

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EXTENSION - FILTER THE LISTING - CHOOSE IMAGE GROUPS FOR FILTERING

Use the following procedure to choose one or more image groups on which to filter the **Image Group Assignment Listing**:

- Click on the lookup button to the right of the Image Groups field on the Image Group Assignment Filter window.
- 2. The Select Image Groups for Filtering window appears in the following state:
 - a. All previously selected image groups appear in the Filter by Image Groups Listing. This may be from a previously applied filter, or the values selected on the active assignment tab.
 - **b.** All other image groups appear in the **Available Image Groups** listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.
 - **d.** The **Apply** and **Close** buttons are enabled.
- Move Available Image Groups to the Filter by Image Groups listing to add them to the filter criteria.
 - a. Double-click on an image group on the Available Image Groups listing.
 - b. Highlight and drag an image group from the Available Image Groups listing to the Filter by Image Groups listing.
 - c. Highlight an image group on the Available Image Groups listing, and click Assign (>).
 - **d.** Highlight an image group on the **Available Image Groups** listing, hold the **Control** key down, click on addition image groups, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- Move Filter by Image Groups to the Available Image Groups listing to remove them to the filter criteria.
 - a. Double-click on an image group on the Filter by Image Groups listing.
 - b. Highlight and drag an image group from the Filter by Image Groups listing to the Available Image Groups listing.
 - **c.** Highlight an image group on the **Filter by Image Groups** listing, and click **Unassign (<)**.
 - d. Highlight an image group on the Filter by Image Groups listing, hold the Control key down, click on addition image groups, and then click Unassign (<).</p>
 - e. Click Unassign All (<<).
- 5. Click **Apply** to populate the Image Groups field on the Image Group Assignment Filter with the selections in the **Filter by Image Groups** listing.

EXTENSION - FILTER THE LISTING - CHOOSE IMAGES FOR FILTERING

Use the following procedure to choose one or more images on which to filter the **Image Assignment Listing**:

- Click on the lookup button to the right of the Images field on the Image Assignment Filter window.
- 2. The Select Images for Filtering window appears in the following state:
 - **a.** All previously selected images appear in the **Filter by Images Listing**. This may be from a previously applied filter, or the values selected on the active assignment tab.
 - **b.** All other images appear in the **Available Images** listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - **d.** The **Apply** and **Close** buttons are enabled.

- 3. Move Available Images to the Filter by Images listing to add them to the filter criteria.
 - a. Double-click on an image on the Available Images listing.
 - b. Highlight and drag an image from the Available Images listing to the Filter by Images listing.
 - Highlight an image on the Available Images listing, and click Assign (>). C.
 - d. Highlight an image on the Available Images listing, hold the Control key down, click on addition images, and then click Assign (>).
 - e. Click Assign All (>>).
- 4. Move Filter by Images to the Available Images listing to remove them to the filter criteria.
 - Double-click on an image on the Filter by Images listing.
 - b. Highlight and drag an image from the Filter by Images listing to the Available Images listina.
 - c. Highlight an image on the Filter by Images listing, and click Unassign (<).
 - d. Highlight an image on the Filter by Images listing, hold the Control key down, click on addition images, and then click Unassign (<).
 - e. Click Unassign All (<<).
- Click **Apply** to populate the Images field on the Image Assignment Filter with the selections in the Filter by Images listing.

EXTENSION - FILTER THE LISTING - CLEAR

Use the following procedure to clear the filter criteria from the listing:

- 1. Choose Filter.
- 2. The Image Group Assignment Filter window appears.
- 3. Choose Clear. The fields are cleared of any criteria.
- 4. Click Apply.
- 5. The Image Group Assignment Listing appears unfiltered.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose More columns.

- The **Grid Layout Properties** window appears in the following state:
 - a. The fields that are currently visible on the grid appear in the Visible Fields listing in the same order from top to bottom that they appear from left to right.
 - **b.** All is selected in both Table fields.
 - **c.** The fields that are currently not visible appear in the **Available Fields** listing.

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- d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
- e. The Reset, Save, Apply and Close buttons are enabled.
- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - b. Highlight and drag a field from the Available Fields listing o the Visible Fields listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- 4. Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - b. To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click Reset.
- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

- 1. Click Print List.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.

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- 5. Choose a **Print To** destination for the final report:
 - **a.** To print to a printer, choose **Printer**.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - **ii.** Click **Save to** to locate a folder and enter a name for the file using the **Save Report** dialog box.
- **6.** Modify the layout of the report, as needed, by clickin on the **Custom** tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time **Print List** was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - b. Move Available Fields to the Included Fields listing to add them to the grid.
 - i. Double-click on a field on the Available Fields listing.
 - Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign** (>).
 - v. Click Assign All (>>).
 - c. Move Included Fields to the Available Fields listing to remove them to the grid.
 - i. Double-click on a field on the Included Fields listing.
 - Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the **Included Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - v. Click Unassign All (<<).
 - **d.** Order the columns as needed:
 - To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
 - e. Sort the list by highlighting a column label in the **Included Fields** listing, and choosing either **Sort Asc(ending)** or **Sort Desc(ending)**.
- **7.** To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details.
 - The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.

- 8. To print the report to the Print To destination, choose Print.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

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- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings – General page, where they may change the file name and/or location.
 - **ii.** After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that.
Channels to Actors	Images page – Assign Images tab. Images page – Assign Image Groups tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Not required. Phase 3 – Required.
Other Management Information.	N/A
Superordinates	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 10.5.8 Manage Image Settings – Deleting Existing Image 10.5.9 Manage Image Settings – Assign Images to Image Groups
Subordinates	None.

10.6. Manage Supporting Pages Use Cases

10.6.1. Manage Supporting Pages – List Supporting Pages [Ph2]

Goal in Context	List available supporting pages defined in Practice Manager for use with portals.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open.
Success End Condition	All available supporting pages are listed.
Failed End Condition	All supporting pages are not listed, even with any filtering removed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal supporting pages are used.
Trigger	User chooses to list supporting pages with the intent of carrying out some management function.

STEPS

- 1. Click on Supporting Pages.
- 2. The list of previously defined supporting pages appears in the following state:
 - a. Focus is on the grid, and the first supporting page is selected.
 - **b.** All buttons are enabled.
- 3. Manipulate the listing as needed in order to locate supporting pages:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - **c.** Hot filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Add new supporting pages.
 - b. Copy an existing supporting page, creating a new one in the process.
 - Set one of the supporting pages as the default.
 - Modify existing supporting pages.
 - Delete existing supporting pages.
 - Print the list of supporting pages.
- 5. Manage General properties, Styles, Footers, Headers, Images, Themes and Publications as needed.
- 6. When finished, click Close.

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EXTENSION – SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION - HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- **2.** Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - **a.** To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- **3.** To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION – MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More columns**.

- 1. The Grid Layout Properties window appears in the following state:
 - **a.** The fields that are currently visible on the grid appear in the **Visible Fields** listing in the same order from top to bottom that they appear from left to right.
 - b. All is selected in both Table fields.
 - c. The fields that are currently not visible appear in the Available Fields listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - e. The Reset, Save, Apply and Close buttons are enabled.

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- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - b. Highlight and drag a field from the Available Fields listing o the Visible Fields listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- **4.** Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - b. To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click Reset.
- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

- 1. Click Print List.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose **Printer**.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.

- 6. Modify the layout of the report, as needed, by clickin on the Custom tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time Print List was selected):
 - a. Filter the Available Fields listing:

- Choose All to show all available columns for the report.
- ii. Choose Selected Field to only show those fields which are currently visible on the arid.
- **b.** Move Available Fields to the Included Fields listing to add them to the grid.
 - Double-click on a field on the Available Fields listing.
 - ii. Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the Available Fields listing, hold the Control key down, click on addition fields, and then click Assign (>).
 - V. Click Assign All (>>).
- c. Move Included Fields to the Available Fields listing to remove them to the grid.
 - Double-click on a field on the Included Fields listing.
 - ii. Highlight and drag a field from the Included Fields listing to the Available Fields
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the Included Field listing, hold the Control key down, click on addition fields, and then click Unassign (<).
 - v. Click Unassign All (<<).
- **d.** Order the columns as needed:
 - To move a column to the left in the grid, highlight the column label in the **Included** Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - To move a column to the right in the grid, highlight the column label in the **Included** Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- e. Sort the list by highlighting a column label in the Included Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- 7. To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details. The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- **8.** To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.
 - The use case for the Window Print dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings General page, where they may change the file name and/or location.

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ii. After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Supporting Pages.
Channels to Actors	Supporting Pages tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.6 Manage Supporting Pages Use Cases 10.6.1 Manage Supporting Pages – List Supporting Pages
Subordinates	10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 10.6.4 Manage Supporting Pages – Deleting Existing Supporting Page

10.6.2. Manage Supporting Pages – Create New Supporting Page [Ph2]

Goal in Context	Create a new supporting page that can then be used on a portal home page or folder summary page.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The Supporting Pages listing is active.
Success End Condition	The supporting page is added to the Supporting Pages listing, and is available on the Select Supporting Pages window.
Failed End Condition	The supporting page is not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal supporting pages are used.
Trigger	Use chooses to create a new supporting page.

STEPS

- 1. Choose New.
- 2. The Supporting Page Properties DE form appears in the following state:
 - a. All fields are null.
 - b. Delete, Save As, and Save are disabled.
 - **c.** Close is enabled.
- 3. Enter a Code for the supporting page.
- **4.** Enter a **Description** for the supporting page.
- **5.** Choose a **Type** for the supporting page from the drop-down list.
- **6.** Choose the type of **Source** for the supporting page from the drop-down list.
- 7. Choose the **Source** for the supporting page.
 - $\textbf{a.} \quad \text{If you choose } \textbf{File}, \text{ you can use the look-up button to locate the file you want to use}.$
 - **b.** If you choose **URL**, enter the URL in the field (there is no lookup function in this specification for the field copy and paste from the browser address/location field is anticipated method)
 - c. Save is now enabled.
- 8. If you want this supporting page to be the default for the selected page **Type**, check **Set as Default**.
- 9. Click Save to save the supporting page.
 - a. Save is disabled.
 - b. Delete, Save As, and Close are enabled.
- 10. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking **No** discards the changes, and continues closing the window.
- 3. Clicking Cancel returns the user to the Supporting Page Properties window without saving or discarding the changes.

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EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default supporting page already exists, a dialog box appears.

- Click Yes to use the current supporting page as the new default, and continue closing the window.
- 2. Click No to keep the existing supporting page as the default, and continue closing the window.

EXTENSION – CHOOSE SUPPORTING PAGE FILE

If you chose URL as the Source type, use the following procedure to select the file for that field.

- 1. Click on the look-up button immediately to the right of the field.
- **2.** The **Find File** dialog appears in the following state:
 - a. The Look in field defaults to the root Practice Manager folder.
 - **b.** The **File name** field is Null.
 - **c.** The **Files of type** defaults to **All files**.
 - **d.** The **Select** button is disabled.
 - e. The Cancel button is enabled.
- **3.** Using the **Look in** field and toolbar, navigate to the folder containing the image file you want to use.
- 4. If needed, change the Files of type field to display fewer files.
- **5.** On the listing, click on the file to populate the **File name** field.
- 6. Click Select.
- 7. The file is added to the **Source** field.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal supporting pages as soon as they start rolling them out for departments and clients.
Performance	Opening a supporting page, < 10 seconds. Saving a supporting page, < 10 seconds, including integrity checks. Closing the window, < 5 seconds, including integrity checks.
Frequency	Often.

Channels to Actors	Supporting Pages tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.1.1 Manage Portal Settings – Set General Portal Settings 10.6 Manage Supporting Pages Use Cases 10.6.1 Manage Supporting Pages – List Supporting Pages
Subordinates	10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 10.6.4 Manage Supporting Pages – Deleting Existing Supporting Page

10.6.3. Manage Supporting Pages – Modify Existing Supporting Page [Ph2]

Goal in Context	Modify an existing supporting page.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The supporting page to be modified exists.
	The Supporting Pages listing is active.
Success End Condition	Changes to the supporting page are saved.
Failed End Condition	Changes to the supporting page are not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal supporting pages are used.
Trigger	Use chooses to modify an existing supporting page.

STEPS

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- 1. Highlight the supporting page to be modifed.
- 2. Choose Open.
- **3.** The **Supporting Page Properties** DE form appears in the following state:
 - **a.** All fields are populated with the values last saved.
 - **b.** Save is disabled.
 - c. Print, Delete, Save As, and Close are enabled.
- 4. Modify any fields as needed.
 - a. Save is now enabled.

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- 5. Click Save to save the supporting page.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 6. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Supporting Page Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default supporting page already exists, a dialog box appears.

- Click Yes to use the current supporting page as the new default, and continue closing the window.
- 2. Click No to keep the existing supporting page as the default, and continue closing the window.

EXTENSION – CHOOSE SUPPORTING PAGE FILE

If you chose URL as the **Source** type, use the following procedure to select the file for that field.

- 1. Click on the look-up button immediately to the right of the field.
- **2.** The **Find File** dialog appears in the following state:
 - a. The Look in field defaults to the root Practice Manager folder.
 - **b.** The **File name** field is Null.
 - c. The Files of type defaults to All files.
 - d. The Select button is disabled.
 - e. The Cancel button is enabled.
- Using the Look in field and toolbar, navigate to the folder containing the image file you want to use.
- 4. If needed, change the Files of type field to display fewer files.
- **5.** On the listing, click on the file to populate the **File name** field.
- 6. Click Select.
- **7.** The file is added to the **Source** field.

RELATED INFORMATION

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Priority	Medium, as users will no doubt want to start modifying portal supporting pages as soon as they start rolling them out for departments and clients.
Performance	Opening a supporting page, < 10 seconds. Saving a supporting page, < 10 seconds, including integrity checks. Closing the supporting page window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Supporting Pages tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.6.1 Manage Supporting Pages – List Supporting Pages 10.6.2 Manage Supporting Pages – Create New Supporting Page
Subordinates	10.6.4 Manage Supporting Pages – Deleting Existing Supporting Page

Manage Supporting Pages – Deleting Existing Supporting Page [Ph2] 10.6.4.

Goal in Context	Delete an existing supporting page.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The supporting page to be deleted exists.
	The supporting page is not used by any active portals or folders.
	The supporting page to be deleted is either on the Supporting Page listing (Method 1), or the Supporting Page Properties DE form for the supporting page to be deleted is open (Method 2).
Success End Condition	The supporting page is deleted and no longer available for use in portals or folders.
Failed End Condition	The supporting page is not deleted.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal supporting pages are used.
Trigger	Use chooses to delete an existing supporting page that is not longer in use.

STEPS - METHOD 1 (DELETE FROM LISTING)

- 1. Highlight the supporting page to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - a. To delete the supporting page, click Yes. The dialog box closes and the supporting page is deleted.

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b. To keep the supporting page, click **No**. The dialog box closes, and the supporting page remains on the listing.

STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- 2. A dialog box appears.
 - **a.** To delete the supporting page, click **Yes**. The dialog box and DE form close. The supporting page is deleted, and the **Supporting Pages** listing appears.
 - **b.** To keep the supporting page, click **No**. The dialog box closes, and the **Supporting Page Properties** DE form remains open.

EXTENSION - SUPPORTING PAGE IN USE

- 1. After choosing to delete the supporting page, the system checks to see if the supporting page is in use by a portal, folder, or theme.
- 2. If the supporting page is in use, a dialog box appears, advising the user the supporting page is in use and cannot be deleted.
- 3. Clicking **OK** closes the dialog box and returns the user to the form from which they chose **Delete**, either the **Supporting Pages** listing or the **Supporting Page Properties** DE form.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Supporting Pages tab. Supporting Page Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	10.6.1 Manage Supporting Pages – List Supporting Pages 10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page
Subordinates	None.

10.7. Manage Themes Use Cases

10.7.1. Manage Themes – List Themes [Ph2]

Goal in Context	List available themes defined in Practice Manager for use with portals.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open.
Success End Condition	All available themes are listed.
Failed End Condition	All themes are not listed, even with any filtering removed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal themes are used.
Trigger	User chooses to list themes with the intent of carrying out some management function.

STEPS

- 1. Click on Themes.
- 2. The list of previously defined themes appears in the following state:
 - **a.** Focus is on the grid, and the first theme is selected.
 - b. All buttons are enabled.
- **3.** Manipulate the listing as needed in order to locate themes:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - **c.** Hot filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Add new themes.
 - **b.** Copy an existing theme, creating a new one in the process.
 - Set one of the themes as the default.
 - **d.** Modify existing themes.
 - Delete existing themes.
 - Print the list of themes.
- 5. Manage General properties, Styles, Headers, Footers, Images, Supporting Pages, and Publications as needed.
- 6. When finished, click Close.

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EXTENSION – SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.
 - **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
 - **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION - HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- **2.** Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - **a.** To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- 3. To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More columns**.

- 1. The Grid Layout Properties window appears in the following state:
 - **a.** The fields that are currently visible on the grid appear in the **Visible Fields** listing in the same order from top to bottom that they appear from left to right.
 - b. All is selected in both Table fields.
 - c. The fields that are currently not visible appear in the Available Fields listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - e. The Reset, Save, Apply and Close buttons are enabled.

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- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - **b.** Highlight and drag a field from the **Available Fields** listing o the **Visible Fields** listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - a. Double-click on a field on the Visible Fields listing.
 - b. Highlight and drag a field from the Visible Fields listing to the Available Fields listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- **4.** Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - b. To move a column to the right in the grid, highlight the column label in the Visible Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click Reset.
- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

- 1. Click Print List.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose **Printer**.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.

- **6.** Modify the layout of the report, as needed, by clickin on the **Custom** tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time **Print List** was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - **b.** Move **Available Fields** to the **Included Fields** listing to add them to the grid.
 - i. Double-click on a field on the Available Fields listing.
 - Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign** (>).
 - v. Click Assign All (>>).
 - c. Move Included Fields to the Available Fields listing to remove them to the grid.
 - i. Double-click on a field on the **Included Fields** listing.
 - ii. Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the **Included Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - v. Click Unassign All (<<).
 - **d.** Order the columns as needed:
 - To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.
 - **e.** Sort the list by highlighting a column label in the **Included Fields** listing, and choosing either **Sort Asc(ending)** or **Sort Desc(ending)**.
- 7. To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details.

 The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- 8. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.
 - The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

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- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - **i.** If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings General page, where they may change the file name and/or location.
 - ii. After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Themes.
Channels to Actors	Themes tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.7 Manage Themes Use Cases
Subordinates	10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme 10.7.5 Manage Themes – Deleting Existing Theme

10.7.2. Manage Themes – Create New Theme [Ph2]

Goal in Context	Create a new theme that can then be used on a portal home page, folder summary page or theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open. The Themes listing is active.
Success End Condition	The theme is added to the Themes listing, and is available on the Select Themes window.
Failed End Condition	The theme is not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal themes are used.
Trigger	Use chooses to create a new theme.

STEPS

- 1. Choose New.
- 2. The Theme Properties DE form appears in the following state:
 - a. All fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - c. Close is enabled.
- 3. Enter a Code for the theme.
- **4.** Enter a **Description** for the theme.
 - a. Save is now enabled.
- 5. If you want this theme to be the default, check Set as Default.
- 6. Complete the remaining fields on the form as needed.
- 7. Click Save to save the theme.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 8. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- Clicking **No** discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Theme Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

1. Click **OK** return to the DE form without saving the changes or closing the window.

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- 2. The cursor should be positioned in the first, non-populated required field.
- **3.** The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default theme already exists, a dialog box appears.

- 1. Click Yes to use the current theme as the new default, and continue closing the window.
- 2. Click No to keep the existing theme as the default, and continue closing the window.

EXTENSION - SELECT PAGE STYLE

To select a Page Style, carry out one of the following:

- 1. Enter the code of the style, and press **Tab**.
 - a. If the style is found, the code field is populated with the style code and description field is populated with the style description.
 - **b.** If the style is not found, the words **Record Not Found** appear in the style code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Style** window appears. Choose a style, and click **Select**. The code field is populated with the style code and description field is populated with the style decription.

EXTENSION - SELECT IMAGE GROUP

To select an Image Group, carry out one of the following:

- **1.** Enter the code of the image group, and press **Tab**.
 - **a.** If the image group is found, the code field is populated with the image group code and description field is populated with the image group description.
 - b. If the image group is not found, the words Record Not Found appear in the image group code field.
- 2. Click on the look-up button immediately to the right of the description field. The Select Image Group window appears. Choose an image group, and click Select. The code field is populated with the image group code and description field is populated with the image group decription.

EXTENSION - SELECT PAGE IMAGE

To select a Page Image, carry out one of the following:

- **1.** Enter the code of the image, and press **Tab**.
 - **a.** If the image is found, the code field is populated with the image code and description field is populated with the image description.
 - **b.** If the image is not found, the words **Record Not Found** appear in the image code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Image** window appears. Choose an image, and click **Select**. The code field is populated with the image code and description field is populated with the image decription.

EXTENSION – SELECT PAGE HEADER

To select a Page Header, carry out one of the following:

- 1. Enter the code of the header, and press **Tab**.
 - **a.** If the header is found, the code field is populated with the header code and description field is populated with the header description.
 - **b.** If the header is not found, the words **Record Not Found** appear in the header code field.

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2. Click on the look-up button immediately to the right of the description field. The **Select Header** window appears. Choose a header, and click **Select**. The code field is populated with the header code and description field is populated with the header decription.

EXTENSION - SELECT PAGE FOOTER

To select a Page Footer, carry out one of the following:

- 1. Enter the code of the footer, and press **Tab**.
 - **a.** If the footer is found, the code field is populated with the footer code and description field is populated with the footer description.
 - b. If the footer is not found, the words Record Not Found appear in the footer code field.
- 2. Click on the look-up button immediately to the right of the description field. The Select Footer window appears. Choose a footer, and click Select. The code field is populated with the footer code and description field is populated with the footer decription.

RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal themes as soon as they start rolling them out for departments and clients.
Performance	Opening a theme, < 10 seconds. Saving a theme, < 10 seconds, including integrity checks. Closing the window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Themes tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.7 Manage Themes Use Cases 10.7.1 Manage Themes – List Themes
Subordinates	10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme 10.7.5 Manage Themes – Deleting Existing Theme

10.7.3. Manage Themes – Copy Existing Theme [Ph2]

Goal in Context	Copy a previously created theme and save as a new theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The theme to be copied exists.
	The theme to be copied is either on the Themes listing (Method 1), or the Theme Properties DE form for the theme to be copied is open (Method 2).
Success End Condition	The new theme is added to the Themes listing, and is available on the Select Themes window.
	The original theme is still in tact.
Failed End Condition	The new theme is not added.
	The existing theme is overwritten.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal themes are used.
Trigger	User chooses to copy an existing theme.

STEPS - METHOD 1 (COPY FROM LISTING)

- 1. Highlight the theme to copy, and choose Copy.
- **2.** The **Theme Properties** DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - b. Print, Delete, Save As, and Save are disabled.
 - **c.** The **Theme Code** field is populated with the values from the selected theme.
- 3. Enter a Code for the theme.
- **4.** Enter a **Description** for the theme.
 - a. Save is now enabled.
- 5. If you want this theme to be the default, check Set as Default.
- 6. Modify the remaining fields as needed.
- 7. Click Save to save the theme.
 - a. Save is disabled.
 - **b.** Print, Delete, Save As, and Close are enabled.
- 8. When finished, click Close.

STEPS - METHOD 2 (SAVE AS FROM DE FORM)

- 1. Choose Save As.
- 2. The Save As DE form appears in the following state:
 - a. The Code, Description and Set as Default fields are null.
 - **b. OK** is disabled.

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- c. Cancel is enabled.
- 3. Enter a Code for the theme.
- 4. Enter a **Description** for the theme.
 - a. OK is now enabled.
- 5. If you want this theme to be the default, check **Set as Default**.
- 6. Click OK.
- The Theme Properties DE form for the original theme is closed without saving any changes, even if they existed.
- **8.** An updated **Theme Properties** DE form appears in the following state:
 - a. The Code, Description and Set as Default fields populated with the values from the Save As window.
 - b. The Print, Delete, Save As, Save and Close buttons are enabled.
 - **c.** The **Theme Code** field is populated with the values from the previously opened theme.
- **9.** Modify the remaining fields as needed.
- **10.** Click **Save** to save the theme.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 11. When finished, click Close.

EXTENSION - UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking **Yes** saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Theme Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the DE form without saving the changes or closing the window.
- The cursor should be positioned in the first, non-populated required field.
- The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION – DEFAULT EXISTS

If a default theme already exists, a dialog box appears.

- 1. Click Yes to use the current theme as the new default, and continue closing the window.
- 2. Click No to keep the existing theme as the default, and continue closing the window.

EXTENSION - SELECT PAGE STYLE

To select a Page Style, carry out one of the following:

- 1. Enter the code of the style, and press **Tab**.
 - a. If the style is found, the code field is populated with the style code and description field is populated with the style description.
 - **b.** If the style is not found, the words **Record Not Found** appear in the style code field.

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2. Click on the look-up button immediately to the right of the description field. The **Select Style** window appears. Choose a style, and click **Select**. The code field is populated with the style code and description field is populated with the style decription.

EXTENSION - SELECT IMAGE GROUP

To select an **Image Group**, carry out one of the following:

- **1.** Enter the code of the image group, and press **Tab**.
 - **a.** If the image group is found, the code field is populated with the image group code and description field is populated with the image group description.
 - **b.** If the image group is not found, the words **Record Not Found** appear in the image group code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Image Group** window appears. Choose an image group, and click **Select**. The code field is populated with the image group code and description field is populated with the image group decription.

EXTENSION - SELECT PAGE IMAGE

To select a Page Image, carry out one of the following:

- 1. Enter the code of the image, and press **Tab**.
 - **a.** If the image is found, the code field is populated with the image code and description field is populated with the image description.
 - **b.** If the image is not found, the words **Record Not Found** appear in the image code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Image** window appears. Choose an image, and click **Select**. The code field is populated with the image code and description field is populated with the image decription.

EXTENSION - SELECT PAGE HEADER

To select a **Page Header**, carry out one of the following:

- **1.** Enter the code of the header, and press **Tab**.
 - **a.** If the header is found, the code field is populated with the header code and description field is populated with the header description.
 - b. If the header is not found, the words Record Not Found appear in the header code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select**Header window appears. Choose a header, and click **Select**. The code field is populated with the header code and description field is populated with the header decription.

EXTENSION – SELECT PAGE FOOTER

To select a Page Footer, carry out one of the following:

- 1. Enter the code of the footer, and press **Tab**.
 - **a.** If the footer is found, the code field is populated with the footer code and description field is populated with the footer description.
 - b. If the footer is not found, the words Record Not Found appear in the footer code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Footer** window appears. Choose a footer, and click **Select**. The code field is populated with the footer code and description field is populated with the footer decription.

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RELATED INFORMATION

Medium, as users will no doubt want to start copying portal themes as soon as they start rolling them out for departments and clients.
Displaying the Save As window, < 2 seconds.
Closing the Save As window with OK, < 5 seconds.
Saving the theme, < 10 seconds, including integrity checks.
Closing the theme window, < 5 seconds, including integrity checks.
Often.
Themes tab.
Theme Properties DE form.
None.
Phase 1 – Not required.
Phase 2 – Required. Phase 3 – Add printing.
N/A
10.1 Manage Portal Settings Use Cases 10.7 Manage Themes Use Cases 10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme
10.7.4 Manage Themes – Modify Existing Theme
10.7.5 Manage Themes – Deleting Existing Theme

Manage Themes – Modify Existing Theme [Ph2] 10.7.4.

Goal in Context	Modify an existing theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The theme to be modified exists.
	The Themes listing is active.
Success End Condition	Changes to the theme are saved.
Failed End Condition	Changes to the theme are not saved.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal themes are used.
Trigger	Use chooses to modify an existing theme.

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STEPS

- 1. Highlight the theme to be modifed.
- 2. Choose Open.
- **3.** The **Theme Properties** DE form appears in the following state:
 - a. All fields are populated with the values last saved.
 - b. Save is disabled.
 - c. Print, Delete, Save As, and Close are enabled.
- Modify any fields as needed.
 - a. Save is now enabled.
- 5. Click Save to save the theme.
 - a. Save is disabled.
 - b. Print, Delete, Save As, and Close are enabled.
- 6. When finished, click Close.

EXTENSION – UNSAVED CHANGES

Upon close, if unsaved changes exist, a dialog box appears.

- 1. Clicking Yes saves the changes, and continues closing the window.
- 2. Clicking No discards the changes, and continues closing the window.
- Clicking Cancel returns the user to the Theme Properties window without saving or discarding the changes.

EXTENSION - REQUIRED FIELDS NOT COMPLETE

Upon saving, if the all required fields are not populated, a dialog box displays.

- 1. Click **OK** return to the the DE form without saving the changes or closing the window.
- 2. The cursor should be positioned in the first, non-populated required field.
- 3. The user can then enter the appropriate information and then attempt to save the record again.

EXTENSION - DEFAULT EXISTS

If a default theme already exists, a dialog box appears.

- 1. Click Yes to use the current theme as the new default, and continue closing the window.
- 2. Click No to keep the existing theme as the default, and continue closing the window.

EXTENSION - SELECT PAGE STYLE

To select a Page Style, carry out one of the following:

- 1. Enter the code of the style, and press **Tab**.
 - **a.** If the style is found, the code field is populated with the style code and description field is populated with the style description.
 - b. If the style is not found, the words Record Not Found appear in the style code field.
- Click on the look-up button immediately to the right of the description field. The Select Style window appears. Choose a style, and click Select. The code field is populated with the style code and description field is populated with the style decription.

EXTENSION - SELECT IMAGE GROUP

To select an Image Group, carry out one of the following:

- 1. Enter the code of the image group, and press **Tab**.
 - **a.** If the image group is found, the code field is populated with the image group code and description field is populated with the image group description.
 - **b.** If the image group is not found, the words **Record Not Found** appear in the image group code field.

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2. Click on the look-up button immediately to the right of the description field. The Select Image Group window appears. Choose an image group, and click Select. The code field is populated with the image group code and description field is populated with the image group decription.

EXTENSION - SELECT PAGE IMAGE

To select a Page Image, carry out one of the following:

- 1. Enter the code of the image, and press **Tab**.
 - **a.** If the image is found, the code field is populated with the image code and description field is populated with the image description.
 - b. If the image is not found, the words Record Not Found appear in the image code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Image** window appears. Choose an image, and click **Select**. The code field is populated with the image code and description field is populated with the image decription.

EXTENSION – SELECT PAGE HEADER

To select a Page Header, carry out one of the following:

- 1. Enter the code of the header, and press **Tab**.
 - **a.** If the header is found, the code field is populated with the header code and description field is populated with the header description.
 - b. If the header is not found, the words Record Not Found appear in the header code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Header** window appears. Choose a header, and click **Select**. The code field is populated with the header code and description field is populated with the header decription.

EXTENSION - SELECT PAGE FOOTER

To select a Page Footer, carry out one of the following:

- 1. Enter the code of the footer, and press **Tab**.
 - **a.** If the footer is found, the code field is populated with the footer code and description field is populated with the footer description.
 - b. If the footer is not found, the words Record Not Found appear in the footer code field.
- 2. Click on the look-up button immediately to the right of the description field. The **Select Footer** window appears. Choose a footer, and click **Select**. The code field is populated with the footer code and description field is populated with the footer decription.

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RELATED INFORMATION

Priority	Medium, as users will no doubt want to start modifying portal themes as soon as they start rolling them out for departments and clients.
Performance	Opening a theme, < 10 seconds. Saving a theme, < 10 seconds, including integrity checks. Closing the theme window, < 5 seconds, including integrity checks.
Frequency	Often.
Channels to Actors	Themes tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.7 Manage Themes Use Cases 10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme
Subordinates	10.7.5 Manage Themes – Deleting Existing Theme

10.7.5. Manage Themes – Deleting Existing Theme [Ph2]

Goal in Context	Delete an existing theme.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings.
	General Portal Settings have been entered and saved.
	The Portal Settings window is open.
	The theme to be deleted exists.
	The theme is not used by any active portals, folders, or themes.
	The theme to be deleted is either on the Theme listing (Method 1), or the Theme Properties DE form for the theme to be deleted is open (Method 2).
Success End Condition	The theme is deleted and no longer available for use in portals, folders, or themes.
Failed End Condition	The theme is not deleted.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal themes are used.
Trigger	Use chooses to delete an existing theme that is not longer in use.

STEPS - METHOD 1 (DELETE FROM LISTING)

- 1. Highlight the theme to be deleted.
- 2. Choose Delete.
- 3. A dialog box appears.
 - a. To delete the theme, click Yes. The dialog box closes and the theme is deleted.
 - To keep the theme, click No. The dialog box closes, and the theme remains on the

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STEPS - METHOD 2 (DELETE FROM DE FORM)

- 1. Choose Delete.
- 2. A dialog box appears.
 - a. To delete the theme, click Yes. The dialog box and DE form close. The theme is deleted, and the **Themes** listing appears.
 - b. To keep the theme, click No. The dialog box closes, and the Theme Properties DE form remains open.

EXTENSION – THEME IN USE

- 1. After choosing to delete the theme, the system checks to see if the theme is in use by a portal, folder, or theme.
- If the theme is in use, a dialog box appears, advising the user the theme is in use and cannot be deleted.
- Clicking **OK** closes the dialog box and returns the user to the form from which they chose Delete, either the Themes listing or the Theme Properties DE form.

RELATED INFORMATION

Priority	Low.
Performance	< 10 seconds, including integrity checks.
Frequency	Rare.
Channels to Actors	Themes tab. Theme Properties DE form.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – No changes.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases 10.7 Manage Themes Use Cases 10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme
Subordinates	None.

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10.8. Manage Publications Use Cases

10.8.1. Manage Publications – List Publications [Ph2]

Goal in Context	List available publications defined in Practice Manager for use with portals. Alternately, the user can choose to view the listing in a number of combinations, including only those publications that have been subscribed to and those that have not. The listing has two modes – with subscription information and without. If with subscription information is chosen, additional columns are available for reviewing and reporting which show subscriptions for each publication.
Scope & Level	Portal Settings
Preconditions	The user has security clearance to administer portal settings. General Portal Settings have been entered and saved. The Portal Settings window is open.
Success End Condition	All available publications are listed.
Failed End Condition	All publications are not listed, even with any filtering removed.
Primary Actors	System Administrator
Secondary Actors	Intermediate to advanced user who has an understanding of how portal publications are used.
Trigger	User chooses to list publications with the intent of carrying out some management function.

STEPS

- 1. Click on Publications.
- 2. The list of previously defined publications appears in the following state:
 - **a.** Focus is on the grid, and the first publication is selected.
 - **b.** All buttons are enabled.
- **3.** Manipulate the listing as needed in order to locate publications:
 - a. Sort the listing.
 - **b.** Modify the grid layout.
 - c. Hot filter the listing.
- **4.** Proceed with any of the following as needed:
 - a. Add new publications.
 - **b.** Copy an existing publication, creating a new one in the process.
 - c. Set one of the publications as the default.
 - **d.** Modify existing publications.
 - e. Delete existing publications.
 - f. Print the list of publications.
- Manage General properties, Styles, Headers, Footers, Images, Supporting Pages, and Themes as needed.
- 6. When finished, click Close.

EXTENSION - SORT THE LISTING

To sort the listing, carryout either of the following:

- 1. Double-click on a column heading.
 - **a.** If the list was not originally sorted on the values in this column, the listing will now be sorted in ascending order based on this values in this column.

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- **b.** If the list was originally sorted on values in this column in ascending order, the list will now be sorted in descending order based on values in this column.
- **c.** If the list was originally sorted on values in this column in descending order, the list will now be sorted in ascending order based on values in this column.
- 2. Right-click on a column heading and choose either **Sort Ascending** or **Sort Decsending** from the pop-up menu to sort the list in ascending or descending order, respectively, based on values in that column.

EXTENSION - HOT FILTER THE LISTING

To filter the listing by values in one of the columns, carryout the following procedure:

- 1. Sort the listing by the column on which you want to filter.
- 2. Type characters corresponding to the filter criteria you want to use. A pop-up field appears above the column heading.
 - **a.** To filter on entries that begin with specific characters, type those characters. As each character is entered, the list is dynamically filtered to show those entries beginning with the entered characters. The more characters that are entered, the more finite the filter.
 - **b.** To filter on entries that contain specific characters within the entry, type an asterisk (*) or percent sign (%), followed by those characters. As each character is entered, the list is dynamically filtered to show those entries containing the entered characters. The more characters that are entered, the more finite the filter.

EXTENSION - FILTER THE LISTING

To filter the listing by one or more portal sites, portals, portal types, publication types, or publications, carry out the following procedure:

- 1. Choose Filter.
- 2. The Publications Listing Filter window appears in the following state:
 - **a.** Existing filter criteria populates the fields. This may be from a previously applied filter.
 - b. All buttons are enabled.
- 3. Choose one or more **Portal Sites** on which to filter the listing, or leave blank to ignore portal sites as a filter criteria.
- **4.** Choose one or more **Portals** on which to filter the listing, or leave blank to ignore portals as a filter criteria.
- **5.** Choose one or more **Portal Types** on which to filter the listing, or leave blank to ignore portal types as a filter criteria.
- **6.** Choose one or more **Publication Types** on which to filter the listing, or leave blank to ignore publication types as a filter criteria.
- 7. Choose one or more **Publications** on which to filter the listing, or leave blank to ignore publications as a filter criteria.
- 8. Click Apply.
- **9.** The **Publications** listing appears filtered using the criteria entered.

EXTENSION - FILTER THE LISTING - CHOOSE PORTAL SITE FOR FILTERING

Use the following procedure to choose one or more portal sites on which to filter the **Publiciations** listing:

- Click on the lookup button to the right of the Portal Site field on the Publications Listing Filter window.
- 2. The Select Portal Sites for Filtering window appears in the following state:
 - **a.** All previously selected portal sites appear in the **Filter by Portal Sites Listing**. This may be from a previously applied filter.
 - b. All other portal sites appear in the Available Portal Sites listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.
 - **d.** The **Apply** and **Close** buttons are enabled.
- Move Available Portal Sites to the Filter by Portal Sites listing to add them to the filter criteria.
 - **a.** Double-click on a portal site on the **Available Portal Sites** listing.
 - b. Highlight and drag a portal site from the Available Portal Sites listing to the Filter by Portal Sites listing.
 - c. Highlight a portal site on the Available Portal Sites listing, and click Assign (>).
 - **d.** Highlight a portal site on the **Available Portal Sites** listing, hold the **Control** key down, click on addition portal sites, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- Move Filter by Portal Sites to the Available Portal Sites listing to remove them to the filter criteria.
 - a. Double-click on a portal site on the Filter by Portal Sites listing.
 - Highlight and drag a portal site from the Filter by Portal Sites listing to the Available Portal Sites listing.
 - c. Highlight a portal site on the Filter by Portal Sites listing, and click Unassign (<).
 - **d.** Highlight a portal site on the **Filter by Portal Sites** listing, hold the **Control** key down, click on addition portal sites, and then click **Unassign (<)**.
 - e. Click Unassign All (<<).
- 5. Click **Apply** to populate the **Portal Sites** field on the **Publications Listing Filter** with the selections in the **Filter by Portal Sites** listing.

EXTENSION – FILTER THE LISTING – CHOOSE PORTAL FOR FILTERING

Use the following procedure to choose one or more portals on which to filter the **Publications** listing:

- Click on the lookup button to the right of the Portal field on the Publications Listing Filter window.
- 2. The Select Portals for Filtering window appears in the following state:
 - **a.** All previously selected portals appear in the **Filter by Portals Listing**. This may be from a previously applied filter.
 - b. All other portals appear in the Available Portals listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - **d.** The **Apply** and **Close** buttons are enabled.

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- 3. Move Available Portals to the Filter by Portals listing to add them to the filter criteria.
 - a. Double-click on a portal on the Available Portals listing.
 - **b.** Highlight and drag a portal from the **Available Portals** listing to the **Filter by Portals** listing.
 - **c.** Highlight a portal on the **Available Portals** listing, and click **Assign (>)**.
 - **d.** Highlight a portal on the **Available Portals** listing, hold the **Control** key down, click on addition portals, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 4. Move Filter by Portals to the Available Portals listing to remove them to the filter criteria.
 - a. Double-click on a portal on the Filter by Portals listing.
 - b. Highlight and drag a portal from the Filter by Portals listing to the Available Portals listing.
 - c. Highlight a portal on the Filter by Portals listing, and click Unassign (<).
 - **d.** Highlight a portal on the **Filter by Portals** listing, hold the **Control** key down, click on addition portals, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- Click Apply to populate the Portals field on the Publications Listing Filter with the selections in the Filter by Portals listing.

EXTENSION – FILTER THE LISTING – CHOOSE PORTAL TYPE FOR FILTERING

Use the following procedure to choose one or more portal types on which to filter the **Publiciations** listing:

- Click on the lookup button to the right of the Portal Type field on the Publications Listing Filter window.
- 2. The Select Portal Types for Filtering window appears in the following state:
 - **a.** All previously selected portal types appear in the **Filter by Portal Types Listing**. This may be from a previously applied filter.
 - **b.** All other portal types appear in the **Available Portal Types** listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - d. The Apply and Close buttons are enabled.
- Move Available Portal Types to the Filter by Portal Types listing to add them to the filter criteria.
 - a. Double-click on a portal type on the Available Portal Types listing.
 - b. Highlight and drag a portal type from the Available Portal Types listing to the Filter by Portal Types listing.
 - c. Highlight a portal type on the Available Portal Types listing, and click Assign (>).
 - **d.** Highlight a portal type on the **Available Portal Types** listing, hold the **Control** key down, click on addition portal types, and then click **Assign (>)**.
 - e. Click Assign All (>>).

- Move Filter by Portal Types to the Available Portal Types listing to remove them to the filter criteria.
 - a. Double-click on a portal type on the Filter by Portal Types listing.
 - **b.** Highlight and drag a portal type from the **Filter by Portal Types** listing to the **Available Portal Types** listing.
 - c. Highlight a portal type on the Filter by Portal Types listing, and click Unassign (<).
 - **d.** Highlight a portal type on the **Filter by Portal Types** listing, hold the **Control** key down, click on addition portal types, and then click **Unassign (<)**.
 - e. Click Unassign All (<<).

5. Click Apply to populate the Portal Types field on the Publications Listing Filter with the selections in the Filter by Portal Types listing.

EXTENSION - FILTER THE LISTING - CHOOSE PUBLICATION FOR FILTERING

Use the following procedure to choose one or more publications on which to filter the **Publiciations** listing:

- Click on the lookup button to the right of the Publication field on the Publications Listing Filter window.
- 2. The Select Publications for Filtering window appears in the following state:
 - a. All previously selected publications appear in the Filter by Publications Listing. This may be from a previously applied filter.
 - b. All other publications appear in the Available Publications listing.
 - C. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - **d.** The **Apply** and **Close** buttons are enabled.
- Move Available Publications to the Filter by Publications listing to add them to the filter criteria.
 - a. Double-click on a publication on the Available Publications listing.
 - b. Highlight and drag a publication from the Available Publications listing to the Filter by Publications listing.
 - c. Highlight a publication on the Available Publications listing, and click Assign (>).
 - **d.** Highlight a publication on the **Available Publications** listing, hold the **Control** key down, click on addition publications, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- Move Filter by Publications to the Available Publications listing to remove them to the filter criteria.
 - a. Double-click on a publication on the Filter by Publications listing.
 - **b.** Highlight and drag a publication from the **Filter by Publications** listing to the **Available Publications** listing.
 - c. Highlight a publication on the Filter by Publications listing, and click Unassign (<).
 - **d.** Highlight a publication on the **Filter by Publications** listing, hold the **Control** key down, click on addition publications, and then click **Unassign (<)**.
 - e. Click Unassign All (<<).
- **5.** Click **Apply** to populate the **Publications** field on the **Publications Listing Filter** with the selections in the **Filter by Publications** listing.

EXTENSION - MODIFY GRID LAYOUT (BASIC)

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To basic modification of the grid layout by carrying out any of the following:

- 1. Click on a column heading and drag it left or right to reposition it.
- 2. Click on the left or right side of a column heading, and drag it to the left or right to resize.
- **3.** To hide/show a column, right-click on the column headings, and deselect or select the column label, respectively, on the pop-up menu.
 - a. To save the grid layout from the listing, right-click on the column headings, and choose Save Grid Layout.

EXTENSION - MODIFY GRID LAYOUT (ADVANCED)

For advanced modification of the grid layout, right click-on any column heading, and choose **More columns**.

- 1. The **Grid Layout Properties** window appears in the following state:
 - **a.** The fields that are currently visible on the grid appear in the **Visible Fields** listing in the same order from top to bottom that they appear from left to right.
 - **b.** All is selected in both Table fields.
 - **c.** The fields that are currently not visible appear in the **Available Fields** listing.
 - d. The Assign (>), Assign All (>>), Unassign (<), and Unassign All (<<) buttons are disabled.</p>
 - e. The Reset, Save, Apply and Close buttons are enabled.
- 2. Move Available Fields to the Visible Fields listing to add them to the grid.
 - a. Double-click on a field on the Available Fields listing.
 - **b.** Highlight and drag a field from the **Available Fields** listing o the **Visible Fields** listing.
 - c. Highlight a field on the Available Fields listing, and click Assign (>).
 - **d.** Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign (>)**.
 - e. Click Assign All (>>).
- 3. Move Visible Fields to the Available Fields listing to remove them to the grid.
 - Double-click on a field on the Visible Fields listing.
 - **b.** Highlight and drag a field from the **Visible Fields** listing to the **Available Fields** listing.
 - c. Highlight a field on the Visible Field listing, and click Unassign (<).
 - **d.** Highlight a field on the **Visible Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - e. Click Unassign All (<<).
- 4. Order the columns as needed:
 - a. To move a column to the left in the grid, highlight the column label in the Visible Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.
 - **b.** To move a column to the right in the grid, highlight the column label in the **Visible Fields** listing, an choose **Move Down**. Repeating the process until the field is in the desired position.
- 5. Sort the list by highlighting a column label in the Visible Fields listing, and choosing either Sort Asc(ending) or Sort Desc(ending).
- **6.** To save the settings, click **Save**.
- 7. To reset the grid settings to the last saved configuration, click **Reset**.

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- To apply the settings to the listing, click Apply. The window is closed and the grid layout is modified.
- To close the Grid Layout Properties window without impacting the listing, click Close. The grid appears in the same state as it was in when the Grid Layout Properties window was opened.

EXTENSION - PRINT THE LISTING

Use the following procedure to print the listing:

- 1. Click Print List.
- 2. The Report Settings window appears with the General tab active.
- 3. Enter a Report Title to appear at the top of each page, or accept the default.
- 4. Check Print System Date to include the system date on each report.
- **5.** Choose a **Print To** destination for the final report:
 - a. To print to a printer, choose Printer.
 - **b.** To print to a file, choose **File**.
 - i. Enter the path where you want to store the file, and a name for the file.
 - ii. Click Save to to locate a folder and enter a name for the file using the Save Report dialog box.
- **6.** Modify the layout of the report, as needed, by clickin on the **Custom** tab and carrying out any of the following (by default, the layout of the report is the same as the layout of the grid at the time **Print List** was selected):
 - a. Filter the Available Fields listing:
 - i. Choose All to show all available columns for the report.
 - Choose Selected Field to only show those fields which are currently visible on the grid.
 - **b.** Move **Available Fields** to the **Included Fields** listing to add them to the grid.
 - i. Double-click on a field on the Available Fields listing.
 - Highlight and drag a field from the Available Fields listing o the Included Fields listing.
 - iii. Highlight a field on the Available Fields listing, and click Assign (>).
 - iv. Highlight a field on the **Available Fields** listing, hold the **Control** key down, click on addition fields, and then click **Assign** (>).
 - v. Click Assign All (>>).
 - **c.** Move **Included Fields** to the **Available Fields** listing to remove them to the grid.
 - i. Double-click on a field on the Included Fields listing.
 - Highlight and drag a field from the Included Fields listing to the Available Fields listing.
 - iii. Highlight a field on the Included Field listing, and click Unassign (<).
 - iv. Highlight a field on the **Included Field** listing, hold the **Control** key down, click on addition fields, and then click **Unassign** (<).
 - v. Click Unassign All (<<).
 - **d.** Order the columns as needed:
 - i. To move a column to the left in the grid, highlight the column label in the Included Fields listing, an choose Move Up. Repeating the process until the field is in the desired position.

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ii. To move a column to the right in the grid, highlight the column label in the Included Fields listing, an choose Move Down. Repeating the process until the field is in the desired position.

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- **e.** Sort the list by highlighting a column label in the **Included Fields** listing, and choosing either **Sort Asc(ending)** or **Sort Desc(ending)**.
- 7. To preview the report before printing or saving, click **Preview**.
 - a. The Report Preview window for the report appears.
 - **b.** From the window, the user can print, save, navigate around, or zoom in on report details. The use case for this functionality is beyond the scope of this FDS, as the component is a standardized report viewing component, and may be subject to change in functionality.
- 8. To print the report to the **Print To** destination, choose **Print**.
 - a. If the destination is Printer, the Report Settings window closes and the Windows Print dialog box appears. Modify the options as needed, including selecting the destination printer, and click OK to print.

The use case for the Window **Print** dialog box is beyond the scope of this FDS, as the component is a standard Windows interface component, and may be subject to change in functionality based on the operating system in use.

- **b.** If the destination is **File**, the file is formatted and saved in the selected folder using the name entered.
 - i. If a file with the same name already exists in that location, a dialog box appears, warning the user of the existance of the other file:
 - (1) The user may overwrite the existing file by choosing Yes.
 - (2) The user may keep the existing file by choosing No. The user is returned to the Report Settings – General page, where they may change the file name and/or location.
 - **ii.** After the report has been successfully saved, the **Report Settings** window closes and a dialog box appears. Choosing **OK** closes the dialog box.

RELATED INFORMATION

Priority	Low.
Performance	Viewing the list, < 5 seconds. Modifying the list (advanced), < 15 seconds, including selections. Printing, <2 minutes from selecting options to generating the desired report.
Frequency	Often during setup. Rarely after that. Portal administrators can access a very similar listing through Select Publications.
Channels to Actors	Publications tab.
Open Issues	None.
Due Date	Phase 1 – Not required. Phase 2 – Required. Phase 3 – Add printing.
Other Management Information.	N/A
Superordinates	10.1 Manage Portal Settings Use Cases

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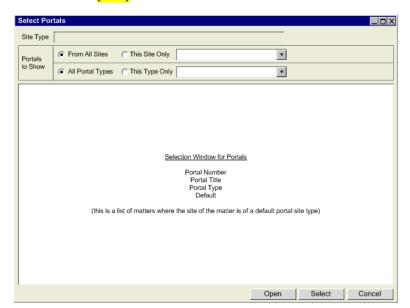
	10.8 Manage Publications Use Cases
Subordinates	8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.4 Publishing Items – Activate/Deactivate Publication

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Common Portal Elements

11. Mockups – Common Portal Elements

11.1. Select Portals [Ph1]





General	Description
Help ID	Portal.Common.SelectPortals
Title	Select Portals
Usage	Allows the user to select portals, such as when choosing a value for the Portal field.
	Note that this listing is basically the same as the listing found on the Select Matter window, pre-filtered on matters of the default portal site type.
Туре	Modal Select Window
Open Focus	Portals to Show – From All Sites
Tab Order	 Portals to Show – This Site Only Portals to Show – This Site Only – Lookup Portals to Show – All Portal Types Portals to Show – This Type Only Portals to Show – This Type Only – Lookup Grid Select Cancel Open Portals to Show – From All Sites
Related Use Cases	6.1.2 Manage Portals – Modify Portal 12.1.1 Select Portal

General	Description
Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portals window.	Portal.Common.SelectPortals.Cancel	
	If the field from which the Select Portals window was opened has values from a previous selection, those values remain.		
Open	Opens the Portals Properties DE form for the highlighted portal, allowing the user to view, modify or save as a new portal.	Portal.Common.SelectPortals.Open	
	Upon close on the existing tooter, the user is returned to the Select Portals window, with the portal still highlighted.		
Select	Closes the Select Portals window, and populates the field from which the Select Portals window was opened with the slected folders.	Portal.Common.SelectPortals.Select	
	This button is not active until at least one portal is selected.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Portals to Show – All Portal Types	If selected, displays portals of all types.	Option 1 of 2 in a set with Portals to Show (for types)	Y	n/a	n/a	Portal.Common.Sel ectPortals.Portalsto Show.AllPortalType s	
Portals to Show – From All Sites	If selected, displays portals from all sites.	Option 1 of 2 in a set with Portals to Show (for sites)	Υ	n/a	n/a	Portal.Common.Sel ectPortals.Portalsto Show.FromAllSites	
Portals to Show – This Site Only	If selected, lists portals from a specific site.	Option 2 of 2 in a set with Portals to Show (for sites)	N	n/a	n/a	Portal.Common.Sel ectPortals.Portalsto Show.ThisSiteOnly	
Portals to Show – This Site Only – Lookup	This is a lookup on available portal sites. Only once site can be selected at a time. This field is active only if Portals to Show – This Site Only is selected.	Drop-down		n/a	n/a	Portal.Common.Sel ectPortals.Portalsto Show.ThisSiteOnly. Lookup	
Portals to Show – This Type Only	If selected, lists portals of a specific type.	Option 2 of 2 in a set with Portals to Show (for types)	N	n/a	n/a	Portal.Common.Sel ectPortals.Portalsto Show.ThisTypeOnly	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Portals to Show – This Type Only – Lookup	This is a lookup on available portal types. Only once type can be selected at a time. This field is active only if Portals to Show – This Type Only is selected.	Drop-down		n/a	n/a	Portal.Common.Sel ectPortals.Portalsto Show.ThisTypeOnly .Lookup	
Site Type	This is the default portal site type. It is displayed for reference only when selecting sites.	Read-only text description of the Site Type.		n/a	n/a	Portal.Common.Sel ectPortals.SiteType	

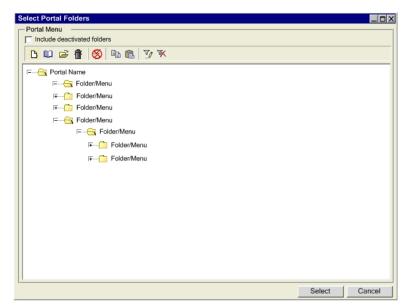
Column Heading	Definition	Help ID	Hot Key
Default	This indicates the portal is the default portal.	Portal.Common.Sel ectPortals.Default	
Portal Number	This is the number of the portal.	Portal.Common.Sel ectPortals.Number	
Portal Title	This is the title of the portal.	Portal.Common.Sel ectPortals.Title	
Portal Type	This is the type of portal.	Portal.Common.Sel ectPortals.Type	

- 1. The grid must support multi-select if appropriate from the source field.
- 2. The grid includes right-click menus on the column headings and listing.
- The full functionality of the Portal Listing, including supporting dialog boxes, is that of a standard Select Matter window in Practice Manager and is beyond the scope of this FDS.
- 4. The functionality of the **Header Properties** DE form is described in 5.2 Portal Management General Profile.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

11.2. Select Portal Folders [Ph1]





General	Description
Help ID	Portal.Common.SelectPortalFolders
Title	Select Portal Folders
Usage	Allows the user to select folders, such as when choosing a value for the Parent Folder field. This window is basically the same as the Portal Menu on the Portal Subscriptions page, only the subscriptions are hidden. The functionality of the toolbar and grid are defined as part of that mockup, and is beyond the scope of this section.
Туре	Modal Select Window
Open Focus	Grid
Tab Order	 Select Cancel Include deactivated folders Grid
Related Use Cases	6.2 Manage the Portal Menu Use Cases 6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.6 Manage the Portal Menu – Copy Folder 6.2.8 Manage the Portal Menu – Delete Folder 6.2.9 Manage the Portal Menu – Filter the Menu 12.1.2 Select Portal Folder
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Folders window. If the field from which the Select Portal Folders window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalFolders.Cancel	
Portal Menu – Toolbar – Clear Filter	Clears any filtering criteria that has been applied to the portal menu.	Portal.Common.SelectPortalFolders.Toolbar.ClearFilt er	
Portal Menu – Toolbar – Copy	Copies the selected folder or subscription to the clipboard. If the item is a folder, the copy action copies not only the folder, but also any subfolders or subscriptions with that folder.	Portal.Common.SelectPortalFolders.Toolbar.Copy	
Portal Menu – Toolbar – Delete (Trash)	Deletes the folder or subscription from the portal menu. If the selection is a subscription, the Delete Confirmation dialog box appears, asking the user to confirm that they want to delete it (Yes) or keep the item (N). If the selection is a folder, the Delete Confirmation dialog box appears, advising the user that the folder and all subfolders and subscriptions within that folder will be deleted, and asks the user to confirm that they want to delete the folder (Yes) or keep it (N).	Portal.Common.SelectPortalFolders.Toolbar.Delete	
Portal Menu – Toolbar – Filter	Displays the Portal Menu Filter, allowing the user to filter the portal menu by folder and/or subscriptions properties.	Portal.Common.SelectPortalFolders.Toolbar.Filter	
Portal Menu – Toolbar – New	Creates a new folder within the active folder, and displays the Folder Properties window.	Portal.Common.SelectPortalFolders.Toolbar.New	
Portal Menu – Toolbar – Open	Displays the item. This button is only active if a subscription is selected.	Portal.Common.SelectPortalFolders.Toolbar.Open	

Buttons	Function / Action	Help ID	Hot Key
Portal Menu – Toolbar – Paste		Portal.Common.SelectPortalFolders.Toolbar.Paste	
	Pastes the last copied folder or subscription into the active folder.		
	If the copied item is a folder, the paste action pastes not only the folder, but also any subfolders or subscriptions with that folder.		
Portal Menu – Toolbar – Properties		Portal.Common.SelectPortalFolders.Toolbar.Properties	
	Displays the Folder Properties or Subscription Properties window, depending on which item is selected on the Portal Menu.		
	This is the same behavior as double-clicking on a folder or item.		
Select	Closes the Select Portal Folders window, and populates the field from which the Select Portal Folders window was opened with the slected folders.	Portal.Common.SelectPortalFolders.Select	
	This button is not active until at least one folder is selected.		

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	Help ID	Hot Key
Include deactivated folders	If selected, the folder grid includes folders which have been deactivated.	Checkbox	N	n/a	n/a	Portal.Common.Sel ectPortalFolders.Inc ludedeactivatedfold ers	

- 1. The grid must support multi-select if appropriate from the source field.
- 2. The grid has a right-click menus for the tree (see image).

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1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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11.3. Select Portal Footers [Ph1]





General	Description	
Help ID	Portal.Common.SelectPortalFooters	
Title	Select Portal Footers	
Usage	Allows the user to select footers, such as when choosing a value for the Footer field.	
Туре	Modal Select Window	
Open Focus	Grid	
Tab Order	 Select Cancel New Print List Copy Open Grid 	
Related Use Cases	10.4 Manage Footers Use Cases 10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer 12.1.3 Select Portal Footer	
Phasing Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open	

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Footers window. If the field from which the Select Portal Footers window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalFooters.Cancel	
		Portal.Common.SelectPortalFooters.Copy	
New	Opens a blank Footers Properties DE form, allowing the user to create a new footer. Upon saving and closing of the Footers Properties DE form, the user is returned to the Select Portal Footers window. The newly created footer appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Footers window was opened from a Footer field on a filter window.	Portal.Common.SelectPortalFooters.New	
Open			
Print List	Prints the list on the Select Portal Footers window.	Portal.Common.SelectPortalFooters.PrintList	
Select	Closes the Select Portal Footers window, and populates the field from which the Select Portal Footers window was opened with the slected folders. This button is not active until at least one footer is selected.	Portal.Common.SelectPortalFooters.Select	

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Column Heading	Definition	Help ID	Hot Key
Code	This is the footer code.	Portal.Common.Sel ectPortalFooters.Co de	
Description	This is the footer description.	Portal.Common.Sel ectPortalFooters.De scription	
Default	This indicates the footer is the default for portals.	Portal.Common.Sel ectPortalFooters.De	

Rules and Clarifications

- The grid must support multi-select if appropriate from the source field.
- The grid includes right-click menus on the column headings and listing.
- The full functionality of the Footer Listing, including supporting dialog boxes, is described in 9.46 Portal Settings Footers Listing.
- The functionality of the Footer Properties DE form is described in 9.53 Portal Settings Footer Properties.
- The functionality of printing the list of footers on the Select Portal Footers window is the same as printing the list of footers from the Portal Settings – Footers window.

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1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

Last Updated: 07/15/2003

11.4. Select Portal Headers [Ph1]





General	Description	
Help ID	Portal.Common.SelectPortalHeaders	
Title	Select Portal Headers	
Usage	Allows the user to select headers, such as when choosing a value for the Header field.	
Туре	Modal Select Window	
Open Focus	Grid	
Tab Order	 Select Cancel New Print List Copy Open Grid 	
Related Use Cases	10.3 Manage Headers Use Cases 10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header 12.1.4 Select Portal Header	
Phasing Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open	

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Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Headers window. If the field from which the Select Portal Headers window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalHeaders.Cancel	
		Portal.Common.SelectPortalHeaders.Copy	
New	Opens a blank Headers Properties DE form, allowing the user to create a new header. Upon saving and closing of the Headers Properties DE form, the user is returned to the Select Portal Headers window. The newly created header appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Headers window was opened from a Header field on a filter window.	Portal.Common.SelectPortalHeaders.New	
		Portal.Common.SelectPortalHeaders.Open	
Print List	Prints the list on the Select Portal Headers window.	Portal.Common.SelectPortalHeaders.PrintList	
Select	Closes the Select Portal Headers window, and populates the field from which the Select Portal Headers window was opened with the slected folders. This button is not active until at least one header is selected.	Portal.Common.SelectPortalHeaders.Select	

Column Heading

This is the header code.

This is the header description.

This indicates the header is the default for portals.

Code

Description

Default

Listing.

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Definition

Internet Portal Integration	Halp ID	Hot
	Help ID	Key
	Portal.Common.Sel ectPortalHeaders.C ode	
	Portal.Common.Sel ectPortalHeaders.D escription	

Portal.Common.Sel

Last Updated: 07/15/2003

		ectPortalHeaders.D efault			
	Rules and Clarifications				
1.	. The grid must support multi-select – if appropriate from the source field.				
2.	2. The grid includes right-click menus on the column headings and listing.				
3.	3. The full functionality of the Header Listing , including supporting dialog boxes, is described in 9.30 Portal Settings – Headers				

1	The functionality of the Header Properties DF form is described in 9.37 Portal Settings – Header Properties

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1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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11.5. Select Portal Image Groups [Ph1]

Printed: 06/12/2018





General	Description
Help ID	Portal.Common.SelectPortalImageGroups
Title	Select Portal Image Groups
Usage	Allows the user to select image groups, such as when choosing a value for the Image Group field.
Туре	Modal Select Window
Open Focus	Grid
Tab Order	 Select Cancel New Print List Open Grid
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group 12.1.6 Select Portal Image Group
Phasing Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Image Groups window. If the field from which the Select Portal Image Groups window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalImageGroups.Cancel	

Buttons	Function / Action	Help ID	Hot Key
New	Opens a blank Image Groups Properties DE form, allowing the user to create a new image group.	Portal.Common.SelectPortalImageGroups.New	
	Upon saving and closing of the Image Groups Properties DE form, the user is returned to the Select Portal Image Groups window. The newly created image group appears on the list, and is automatically highlighted for selection.		
	This button is not available if the Select Portal Image Groups window was opened from an image group field on a filter window.		
Open	Opens the Image Groups Properties DE form for the highlighted image group, allowing the user to view, modify or save as a new image group.	Portal.Common.SelectPortalImageGroups.Open	
	Upon close on the existing tooter, the user is returned to the Select Portal Image Groups window, with the image group still highlighted.		
	If save as and then close is carried out, the user is returned to the Select Portal Image Groups window. The newly created image group appears on the list, and is automatically highlighted for selection.		
	This button is not available if the Select Portal Image Groups window was opened from an image group field on a filter window.		
Print List	Prints the list on the Select Portal Image Groups window.	Portal.Common.SelectPortalImageGroups.PrintList	
Select	Closes the Select Portal Image Groups window, and populates the field from which the Select Portal Image Groups window was opened with the slected folders.	Portal.Common.SelectPortalImageGroups.Select	
	This button is not active until at least one image group is selected.		

Column Heading	Definition	Help ID	Hot Key
Code	This is the image group code.	Portal.Common.Sel ectPortalImageGrou ps.Code	
Description	This is the image group description.	Portal.Common.Sel ectPortalImageGrou ps.Description	
Default	This indicates the image group is the default for portals.	Portal.Common.Sel ectPortalImageGrou ps.Default	

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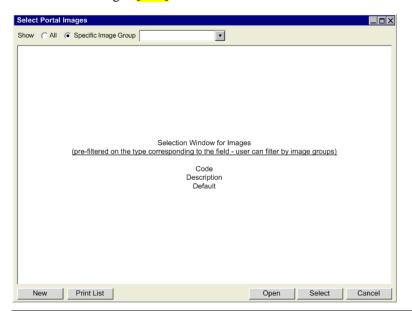
- 1. The grid must support multi-select if appropriate from the source field.
- 2. The grid includes right-click menus on the column headings and listing.
- The full functionality of the Image Groups Listing, including supporting dialog boxes, is described in 9.62 Portal Settings Images
 Groups Listing.
- 4. The functionality of the Image Group Properties DE form is described in 9.69 Portal Settings Image Group Properties.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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11.6. Select Portal Images [Ph1]

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General	Description				
Help ID	Portal.Common.SelectPortalImages				
Title	elect Portal Images				
Usage	llows the user to select images, such as when choosing a value for the Image field				
Туре	Modal Select Window				
Open Focus	Show – All				
Tab Order	 Show – Specific Image Group Show – Specific Image Group Lookup Grid Select Cancel New Print List Open Show – All 				
Related Use Cases	10.5 Manage Image Settings Use Cases 10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image 12.1.5 Select Portal Image				
Phasing Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open				

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Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Images window. If the field from which the Select Portal Images window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalImages.Cancel	
New	Opens a blank Images Properties DE form, allowing the user to create a new image. Upon saving and closing of the Images Properties DE form, the user is returned to the Select Portal Images window. The newly created image appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Images window was opened from an Image field on a filter window.	Portal.Common.SelectPortalImages.New	
Open	Opens the Images Properties DE form for the highlighted image, allowing the user to view, modify or save as a new image. Upon close on the existing tooter, the user is returned to the Select Portal Images window, with the image still highlighted. If save as and then close is carried out, the user is returned to the Select Portal Images window. The newly created image appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Images window was opened from an Image field on a filter window.	Portal.Common.SelectPortalImages.Open	
Print List	Prints the list on the Select Portal Images window.	Portal.Common.SelectPortalImages.PrintList	
Select	Closes the Select Portal Images window, and populates the field from which the Select Portal Images window was opened with the slected folders. This button is not active until at least one image is selected.	Portal.Common.SelectPortalImages.Select	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	Help ID	Hot Key
Show – All	If selected, lists all images, regardless of image group assignment.	Option 1 of 2 in a set with Show	Y	n/a	n/a	Portal.Common.Sel ectPortalImages.Sh owAll	
Show – Specific Image Group	If selected, lists images assigned to a selected image group.	Option 2 of 2 in a set with Show	N	n/a	n/a	Portal.Common.Sel ectPortalImages.Sh owSpecificImageGr oup	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	Help ID	Hot Key
Show – Specific Image Group – Lookup	This is the image group on which the list of images is filtered. It is only enabled if Show – Specific Image Group is selected.	Drop-down List	N	n/a	n/a	Portal.Common.Sel ectPortalImages.Sh owSpecificImageGr oupLookup	

Column Heading	Definition	Help ID	Hot Key
Code	This is the image code.	Portal.Common.Sel ectPortalImages.Co de	
Description	This is the image description.	Portal.Common.Sel ectPortalImages.De scription	
Default	This indicates the image is the default for portals.	Portal.Common.Sel ectPortalImages.Def ault	

- 1. The grid must support multi-select if appropriate from the source field.
- 2. The grid includes right-click menus on the column headings and listing.
- 3. The full functionality of the **Images Listing**, including supporting dialog boxes, is described in 9.73 Portal Settings Images Images Listing.
- 4. The functionality of the Image Properties DE form is described in 9.80 Portal Settings Image Properties.

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1.00	03/03/2002	TAF	Original Mockup
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11.7. Select Portal Styles [Ph1]

Printed: 06/12/2018





General	Description
Help ID	Portal.Common.SelectPortalStyles
Title	Select Portal Styles
Usage	Allows the user to select styles, such as when choosing a value for the Style field.
Туре	Modal Select Window
Open Focus	Grid
Tab Order	 Select Cancel New Print List Copy Open Grid
Related Use Cases	10.2 Manage Styles Use Cases 10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style 12.1.7 Select Portal Style
Phasing Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Styles window. If the field from which the Select Portal Styles window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalStyles.Cancel	
Сору	Opens the Styles Properties DE form for the highlighted style with the Code and Description field clears, allowing the user to create a new style based on an existing one.	Portal.Common.SelectPortalStyles.Copy	
	Upon saving and closing of the Styles Properties DE form, the user is returned to the Select Portal Styles window. The newly created style appears on the list, and is automatically highlighted for selection.		
	This button is not available if the Select Portal Styles window was opened from a Style field on a filter window.		
New	Opens a blank Styles Properties DE form, allowing the user to create a new style.	Portal.Common.SelectPortalStyles.New	
	Upon saving and closing of the Styles Properties DE form, the user is returned to the Select Portal Styles window. The newly created style appears on the list, and is automatically highlighted for selection.		
	This button is not available if the Select Portal Styles window was opened from a Style field on a filter window.		
Open	Opens the Styles Properties DE form for the highlighted style, allowing the user to view, modify or save as a new style.	Portal.Common.SelectPortalStyles.Open	
	Upon close on the existing tooter, the user is returned to the Select Portal Styles window, with the style still highlighted.		
	If save as and then close is carried out, the user is returned to the Select Portal Styles window. The newly created style appears on the list, and is automatically highlighted for selection.		
	This button is not available if the Select Portal Styles window was opened from a Style field on a filter window.		
Print List	Prints the list on the Select Portal Styles window.	Portal.Common.SelectPortalStyles.PrintList	
Select	Closes the Select Portal Styles window, and populates the field from which the Select Portal Styles window was opened with the slected folders.	Portal.Common.SelectPortalStyles.Select	
	This button is not active until at least one style is selected.		

Column Heading

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Definition

ortal Integration			•
	Help ID	Hot Key	
	Portal.Common.Sel ectPortalStyles.Cod e		
	Portal.Common.Sel		

Last Updated: 07/15/2003

			Key
Code	This is the style code.	Portal.Common.Sel ectPortalStyles.Cod e	
Description	This is the style description.	Portal.Common.Sel ectPortalStyles.Des cription	
Default	This indicates the style is the default for portals.	Portal.Common.Sel ectPortalStyles.Defa ult	
Γ	D. J. O. 18. 11		

- The grid must support multi-select if appropriate from the source field.
- The grid includes right-click menus on the column headings and listing.
- The full functionality of the **Styles Listing**, including supporting dialog boxes, is described in 9.11 Portal Settings Styles Listing.
- The functionality of the Style Properties DE form is described beginning in 9.18 Portal Settings Style Properties Menu.

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1.00	03/03/2002	TAF	Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

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11.8. Select Portal Supporting Pages [Ph1]





General	Description
Help ID	Portal.Common.SelectPortalSuppPages
Title	Select Portal Supporting Pages
Usage	Allows the user to select supporting pages, such as when choosing a value for the Supporting Page field. The listing on this window is prefiltered by the type of supporting page appropriate to the field from which this window was opened.
Туре	Modal Select Window
Open Focus	Grid
Tab Order	 Select Cancel New Print List Open Grid
Related Use Cases	10.6 Manage Supporting Pages Use Cases 10.6.1 Manage Supporting Pages – List Supporting Pages 10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page 12.1.8 Select Portal Supporting Pages
Phasing Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Supporting Pages window. If the field from which the Select Portal Supporting Pages window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalSuppPages.Cancel	
New	Opens a blank Supporting Pages Properties DE form, allowing the user to create a new supporting page. Upon saving and closing of the Supporting Pages Properties DE form, the user is returned to the Select Portal Supporting Pages window. The newly created supporting page appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Supporting Pages window was opened from a Supporting Page field on a filter window.	Portal.Common.SelectPortalSuppPages.New	
Open	Opens the Supporting Pages Properties DE form for the highlighted supporting page, allowing the user to view, modify or save as a new supporting page. Upon close on the existing tooter, the user is returned to the Select Portal Supporting Pages window, with the supporting page still highlighted. If save as and then close is carried out, the user is returned to the Select Portal Supporting Pages window. The newly created supporting page appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Supporting Pages window was opened from a Supporting Page field on a filter window.	Portal.Common.SelectPortalSuppPages.Open	
Print List	Prints the list on the Select Portal Supporting Pages window.	Portal.Common.SelectPortalSuppPages.PrintList	
Select	Closes the Select Portal Supporting Pages window, and populates the field from which the Select Portal Supporting Pages window was opened with the slected folders. This button is not active until at least one supporting page is selected.	Portal.Common.SelectPortalSuppPages.Select	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Page Type	This is the page type on which the listing is filtered. The field is populated based on the source field from which this window was opened.	Read-only text description.	Y	n/a	n/a	Portal.Common.Sel ectPortalSuppPages .PageType	

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Column Heading	Definition	Help ID	Hot Key
Code	This is the supporting page code.	Portal.Common.Sel ectPortalSuppPage s.Code	
Description	This is the supporting page description.	Portal.Common.Sel ectPortalSuppPage s.Description	
Default	This indicates the supporting page is the default for portals.	Portal.Common.Sel ectPortalSuppPage s.Default	
Туре	This is the type of supporting page.	Portal.Common.Sel ectPortalSuppPage s.Type	

- 1. The grid must support multi-select if appropriate from the source field.
- 2. The grid includes right-click menus on the column headings and listing.
- 3. The full functionality of the **Supporting Pages Listing**, including supporting dialog boxes, is described in 9.98 Portal Settings Supporting Pages Listing.
- 4. The functionality of the Supporting Page Properties DE form is described in 9.105 Portal Settings Supporting Page Properties.
- 5. The listing on this window is prefiltered by the type of supporting page appropriate to the field from which this window was opened.

Rev No.	Rev Date	Rev By	Revision Description	
1.00	03/03/2002	TAF	Original Mockup	
1.10	03/18/2002	TAF	Final mockup for development review and coding.	

Last Updated: 07/15/2003

11.9. Select Portal Themes [Ph1]

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General	Description
Help ID	Portal.Common.SelectPortalThemes
Title	Select Portal Themes
Usage	Allows the user to select themes, such as when choosing a value for the Theme field.
Туре	Modal Select Window
Open Focus	Grid
Tab Order	 Select Cancel New Print List Copy Open Grid
Related Use Cases	10.7 Manage Themes Use Cases 10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme 12.1.9Select Portal Theme
Phasing Considerations	Phase 1 – Select and Cancel Required Phase 2 – No changes Phase 3 – Add New, Print List, Copy and Open

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Portal Themes window. If the field from which the Select Portal Themes window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPortalThemes.Cancel	
Сору	Opens the Themes Properties DE form for the highlighted theme with the Code and Description field clears, allowing the user to create a new theme based on an existing one. Upon saving and closing of the Themes Properties DE form, the user is returned to the Select Portal Themes window. The newly created theme appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Themes window was opened from a Theme field on a filter window.	Portal.Common.SelectPortalThemes.Copy	
New	Opens a blank Themes Properties DE form, allowing the user to create a new theme. Upon saving and closing of the Themes Properties DE form, the user is returned to the Select Portal Themes window. The newly created theme appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Themes window was opened from a Theme field on a filter window.	Portal.Common.SelectPortalThemes.New	
Open	Opens the Themes Properties DE form for the highlighted theme, allowing the user to view, modify or save as a new theme. Upon close on the existing tooter, the user is returned to the Select Portal Themes window, with the theme still highlighted. If save as and then close is carried out, the user is returned to the Select Portal Themes window. The newly created theme appears on the list, and is automatically highlighted for selection. This button is not available if the Select Portal Themes window was opened from a Theme field on a filter window.	Portal.Common.SelectPortalThemes.Open	
Print List	Prints the list on the Select Portal Themes window.	Portal.Common.SelectPortalThemes.PrintList	
Select	Closes the Select Portal Themes window, and populates the field from which the Select Portal Themes window was opened with the slected folders. This button is not active until at least one theme is selected.	Portal.Common.SelectPortalThemes.Select	

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	Help ID	Hot Key
	Portal.Common.Sel ectPortalThemes.C ode	
	Portal.Common.Sel	

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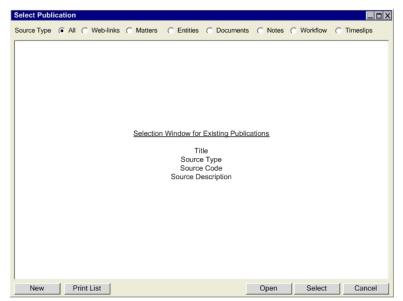
Column Heading	Definition	Help ID	Hot Key
Code	This is the theme code.	Portal.Common.Sel ectPortalThemes.C ode	
Description	This is the theme description.	Portal.Common.Sel ectPortalThemes.D escription	
Default	This indicates the theme is the default for portals.	Portal.Common.Sel ectPortalThemes.D efault	

- The grid must support multi-select if appropriate from the source field.
- The grid includes right-click menus on the column headings and listing.
- The full functionality of the Themes Listing, including supporting dialog boxes, is described in 9.110 Portal Settings Themes Listing.
- The functionality of the **Theme Properties** DE form is described in 9.117 Portal Settings Theme Properties.

Rev No.	Rev Date	Rev By	Revision Description		
1.00	03/03/2002	TAF	Original Mockup		
1.10	03/18/2002	TAF	Final mockup for development review and coding.		

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11.10. Select Publication [Ph1]





General	Description
Help ID	Portal.Common.SelectPublication
Title	Select Publication
Usage	Allows the user to select publications, such as when choosing a value for the Source field on the Subscription Properties DE form.
Туре	Modal Select Window
Open Focus	Source Type – All
Tab Order	 Source Type – Weblinks Source Type – Matters Source Type – Entities Source Type – Documents Source Type – Notes Source Type – Workflow Source Type – Timeslips Grid Select Cancel New Print List Open Source Type – All
Related Use Cases	8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 8.1.4 Publishing Items – Activate/Deactivate Publication 8.1.5 Publishing Items – Delete Existing Publication 10.8 Manage Publications Use Cases 10.8.1 Manage Publications – List Publications 12.1.10 Select Publication

General	Description
Considerations	Phase 1 – New, Open, Select and Cancel Required Phase 2 – No changes Phase 3 – Add Print List

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Publications window. If the field from which the Select Publications window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPublication.Cancel	
New	Opens a blank Publications Properties DE form, allowing the user to create a new publication. Upon saving and closing of the Publications Properties DE form, the user is returned to the Select Publications window. The newly created publication appears on the list, and is automatically highlighted for selection. This button is not available if the Select Publications window was opened from a Publication field on a filter window.	Portal.Common.SelectPublication.New	
Open	Opens the Publications Properties DE form for the highlighted publication, allowing the user to view, modify or save as a new publication. Upon close on the existing tooter, the user is returned to the Select Publications window, with the publication still highlighted. If save as and then close is carried out, the user is returned to the Select Publications window. The newly created publication appears on the list, and is automatically highlighted for selection. This button is not available if the Select Publications window was opened from a Publication field on a filter window.	Portal.Common.SelectPublication.Open	
Print List	Prints the list on the Select Publications window.	Portal.Common.SelectPublication.PrintList	
Select	Closes the Select Publications window, and populates the field from which the Select Publications window was opened with the slected folders. This button is not active until at least one publication is selected.	Portal.Common.SelectPublication.Select	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Source Type – All	When selected, the list displays all existing publications, regardless of type.	Option 1 of 8	Yes	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.All	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Source Type – Documents	When selected, the list displays all existing publications where the source is a document.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.Documents	
Source Type – Entities	When selected, the list displays all existing publications where the source is an entity.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.Entities	
Source Type – Matters	When selected, the list displays all existing publications where the source is a matter.	Option 3 of 8	No	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.Matters	
Source Type – Notes	When selected, the list displays all existing publications where the source is a note.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.Notes	
Source Type – Timeslips	When selected, the list displays all existing publications where the source is a timeslip.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.Timeslips	
Source Type – Weblinks	When selected, the list displays all existing publications where the source is a Weblink.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.Weblinks	
Source Type – Workflow	When selected, the list displays all existing publications where the source is a workflow item.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublications.Sour ceType.Workflow	

Column Heading	Definition	Help ID	Hot Key
Source Code	This is the code from the source for the publication. The column is null for Weblink, document, note, workflow and timeslip publications. For matters, this is the Matter Number. For entities, this is the Entity Code.	Portal.Common.Sel ectPublication.Sourc eCode	
Source Description	This is the description from the source for the publication. For Weblinks, this is the URL or command line. For matters, this is the Short Matter Name. For entities, this is the full Entity Name. For documents, notes, and workflow items, this is the Description. For timeslips, this is the Transaction Description.	Portal.Common.Sel ectPublication.Sourc eDescription	
Source Type	This is the source type of the publication.	Portal.Common.Sel ectPublication.Sourc eType	

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Column Heading	Definition	Help ID	Hot Key
Title	This is the title of the publication	Portal.Common.Sel ectPublication.Title	

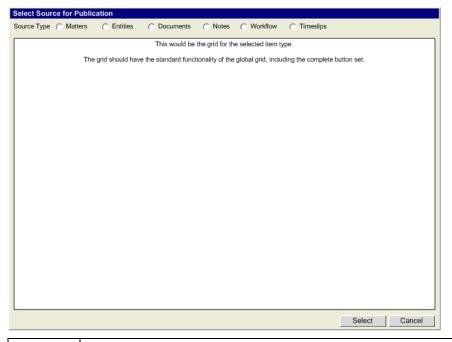
Rules and Clarifications

- 1. The grid must support multi-select if appropriate from the source field.
- 2. The grid includes right-click menus on the column headings and listing.
- 3. The full functionality of the **Publications Listing**, including supporting dialog boxes, is described in 9.122 Portal Settings Publications Listing.
- 4. The functionality of the **Publication Properties** DE form is described in 7 Publications Mockups.

Rev No.	Rev Date	Rev By	Revision Description
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

11.11. Select Publication Source [Ph1]



General	Description	
Help ID	Portal.Common.SelectPublicationSource	
Title	Select Source for Publication	
Usage	Allows the user to select a source for a publication. Basically this form is a "frame" for the existing global listings for matters, entities, documents, notes, workflow, and timeslips. When the use selects a source type, the grid is refreshed with the appropriate global listing, such as the Global Matter Listing when Matters is selected. The functionality of those listings is beyond the scope of this FDS. Only the functionality of the selection options are described herein.	
Туре	Modal Select Window	
Open Focus	Source Type – Matters	
Tab Order	 Source Type – Entities Source Type – Documents Source Type – Notes Source Type – Workflow Source Type – Timeslips Grid Select Cancel Source Type – Matters 	
Related Use Cases	12.1.11 Select Publication Source	

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General	Description
Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Buttons	Function / Action	Help ID	Hot Key
Cancel	Closes the Select Publications window. If the field from which the Select Publications window was opened has values from a previous selection, those values remain.	Portal.Common.SelectPublicationSource.Cancel	
Select	Closes the Select Publications window, and populates the field from which the Select Publications window was opened with the slected folders. This button is not active until at least one publication is selected.	Portal.Common.SelectPublicationSource.Select	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	HelpID	Hot Key
Source Type – Matters	When selected, the list displays all existing publications where the source is a matter.	Option 3 of 8	No	n/a	n/a	Portal.Common.Sel ectPublicationSourc es.SourceType.Matt ers	
Source Type – Entities	When selected, the list displays all existing publications where the source is an entity.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublicationSourc es.SourceType.Entit ies	
Source Type – Documents	When selected, the list displays all existing publications where the source is a document.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublicationSourc es.SourceType.Doc uments	
Source Type – Notes	When selected, the list displays all existing publications where the source is a note.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublicationSourc es.SourceType.Note s	
Source Type – Workflow	When selected, the list displays all existing publications where the source is a workflow item.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublicationSourc es.SourceType.Wor kflow	
Source Type – Timeslips	When selected, the list displays all existing publications where the source is a timeslip.	Option 2 of 8	No	n/a	n/a	Portal.Common.Sel ectPublicationSourc es.SourceType.Tim eslips	

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Rules and Clarifications

- 1. The functionality of the grid, including subfunctions and dialog boxes, is that of the **Global Listing** appropriate for the selected **Source Type**. That functionality is beyond the scope of this FDS, as this FDS inherits functionality from those listings.
- 2. When a publication source is selected for a new publication, the field set on the **Publication Properties** DE form is refreshed to
- 3. 32match that of the selected **Source Type**.
- 4. The window is pre-filtered on the appropriate **Source Type** when opened from an existing publication, and all **Source Type** options are read-only.

Rev No.	Rev Date	Rev By Revision Description	
1.00	03/03/2002	TAF	Original Mockup
1.10	03/18/2002	TAF	Final mockup for development review and coding.

12. Use Cases - Common

12.1.1. Select Portal [Ph1]

Goal in Context	Select a portal for a Portal field.
Scope & Level	Select Portal
Preconditions	The portal is existing. The user has permission to list portals (this is the same as List Matters).
Success End Condition	The field is populated with the selected portal.
Failed End Condition	The field is not populated with the selected portal.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select a portal to populate a Portal field.

STEPS

- 1. From the Portal field, click on the Lookup button.
- 2. The **Select Portal** window appears in the following state:
 - **a.** Site Type is populated with the default portal site type.
 - b. From All Sites is selected.
 - c. All Portal Types is selected.
 - **d.** The grid is in focus with the first portal highlighted.
 - e. All buttons are active.
- 3. Modify the filtering criteria as needed.
 - a. To view portals for a specific site, choose This Site Only and select a site from the drop-down list, which is pre-filtered on the default portal site type.
 - **b.** To view portals of a specific type, choose **This Type Only** and select a portal type (Law Types) from the drop-down list.
- **4.** Highlight the portal you want to use, and choose **Select**.
- 5. The **Portal** field appears with the selected portal populated the field.

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.
Channels to Actors	Portal Field – Lookup
Open Issues	None.

Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	The grid inherits functionality from the Practice Manager Select Matters grid.
Subordinates	The grid inherits functionality from the Practice Manager Select Matters grid.

12.1.2. Select Portal Folder [Ph1]

Goal in Context	Select a folder for a Folder field.
Scope & Level	Select Portal Folder
Preconditions	The folder field is active.
Success End Condition	The field is populated with the selected folder.
Failed End Condition	The field is not populated with the selected folder.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select a folder to populate a Folder field.

- 1. From the Folder field, click on the Lookup button.
- 2. The **Select Folder** window appears in the following state:
 - a. Include deactivate folders is not selected.
 - **b.** The tree is collapsed to the top level (portal only), and that top-level node is selected.
 - c. All buttons are active.
- 3. Work with the folder tree as needed:
 - a. Expand and collapse the branches.
 - **b.** Create new folders.
 - c. View folder properties.
 - d. Activate/Deactivate folders.
 - e. Copy folders.
 - f. Move folders.
 - g. Filter the folder tree.
- 4. Highlight the folder you want to use, and choose Select.
- **5.** The **Folder** field appears with the selected folder populated the field.

RELATED INFORMATION

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.
Channels to Actors	Folder Field – Lookup
Open Issues	None.
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.
Subordinates	6.2.1 Manage the Portal Menu – Create Folder 6.2.2 Manage the Portal Menu – Modify Folder 6.2.3 Manage the Portal Menu – Define Presentation for Folder 6.2.4 Manage the Portal Menu – Define Supporting Pages for Folder 6.2.5 Manage the Portal Menu – Activate/Deactivate Folder 6.2.7 Manage the Portal Menu – Move a Folder 6.2.6 Manage the Portal Menu – Copy Folder 6.2.8 Manage the Portal Menu – Delete Folder 6.2.9 Manage the Portal Menu – Filter the Menu

12.1.3. Select Portal Footer [Ph1]

Goal in Context	Select a footer for a Footer field.
Scope & Level	Select Portal Footer
Preconditions	The footer field is active.
Success End Condition	The field is populated with the selected footer.
Failed End Condition	The field is not populated with the selected footer.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select a footer to populate a Footer field.

- 1. From the Footer field, click on the Lookup button.
- **2.** The **Select Footer** window appears in the following state:
 - a. The grid is in focus with the first footer highlighted.
 - **b.** All buttons are active.

- **3.** Work with the footer listing as needed:
 - a. Create new footers.
 - **b.** Open/modify footers.
 - c. Copy footers.

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- **d.** Filter the footer listing.
- 4. Highlight the footer you want to use, and choose **Select**.
- 5. The Footer field appears with the selected footer populated the field.

RELATED INFORMATION

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.
Channels to Actors	Footer Field – Lookup
Open Issues	None.
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.
Subordinates	10.4.1 Manage Footers – List Footers 10.4.2 Manage Footers – Create New Footer 10.4.3 Manage Footers – Copy Existing Footer 10.4.4 Manage Footers – Modify Existing Footer

12.1.4. Select Portal Header [Ph1]

Goal in Context	Select a header for a Header field.
Scope & Level	Select Portal Header
Preconditions	The header field is active.
Success End Condition	The field is populated with the selected header.
Failed End Condition	The field is not populated with the selected header.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select a header to populate a Header field.

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STEPS

- 1. From the **Header** field, click on the **Lookup** button.
- 2. The Select Header window appears in the following state:
 - a. The grid is in focus with the first header highlighted.
 - **b.** All buttons are active.
- **3.** Work with the header listing as needed:
 - a. Create new headers.
 - **b.** Open/modify headers.
 - c. Copy headers.
 - d. Filter the header listing.
- 4. Highlight the header you want to use, and choose Select.
- **5.** The **Header** field appears with the selected header populated the field.

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.
Channels to Actors	Header Field – Lookup
Open Issues	None.
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.
Subordinates	10.3.1 Manage Headers – List Headers 10.3.2 Manage Headers – Create New Header 10.3.3 Manage Headers – Copy Existing Header 10.3.4 Manage Headers – Modify Existing Header

12.1.5. Select Portal Image [Ph1]

Goal in Context	Select an image for an Image field.
Scope & Level	Select Portal Image
Preconditions	The image field is active.
Success End Condition	The field is populated with the selected image.
Failed End Condition	The field is not populated with the selected image.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select an image to populate an Image field.

STEPS

- 1. From the **Image** field, click on the **Lookup** button.
- 2. The **Select Image** window appears in the following state:
 - a. The grid is in focus with the first image highlighted.
 - **b.** All buttons are active.
- 3. Work with the image listing as needed:
 - a. Create new images.
 - **b.** Open/modify images.
 - c. Filter the image listing.
- 4. Highlight the image you want to use, and choose Select.
- 5. The **Image** field appears with the selected image populated the field.

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.
Channels to Actors	Image Field – Lookup
Open Issues	None.
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.

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10.5.5 Manage Image Settings – List Images 10.5.6 Manage Image Settings – Create New Image 10.5.7 Manage Image Settings – Modify Existing Image
10.5.7 Manage image Settings – Mounty Existing image

12.1.6. Select Portal Image Group [Ph1]

Goal in Context	Select an image group for an Image Group field.
Scope & Level	Select Portal Image Group
Preconditions	The image group field is active.
Success End Condition	The field is populated with the selected image group.
Failed End Condition	The field is not populated with the selected image group.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select an image group to populate an Image Group field.

STEPS

- 1. From the **Image Group** field, click on the **Lookup** button.
- 2. The Select Image Group window appears in the following state:
 - a. The grid is in focus with the first image group highlighted.
 - **b.** All buttons are active.
- **3.** Work with the image group listing as needed:
 - a. Create new image groups.
 - **b.** Open/modify image groups.
 - c. Filter the image group listing.
- **4.** Highlight the image group you want to use, and choose **Select**.
- 5. The **Image Group** field appears with the selected image group populated the field.

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.
Channels to Actors	Image Group Field – Lookup
Open Issues	None.
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.

Other Management Information.	None.
Superordinates	None.
Subordinates	10.5.1 Manage Image Settings – List Image Groups 10.5.2 Manage Image Settings – Create New Image Group 10.5.3 Manage Image Settings – Modify Existing Image Group

12.1.7. Select Portal Style [Ph1]

Goal in Context	Select a style for a Style field.
Scope & Level	Select Portal Style
Preconditions	The style field is active.
Success End Condition	The field is populated with the selected style.
Failed End Condition	The field is not populated with the selected style.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select a style to populate a Style field.

STEPS

- 1. From the Style field, click on the Lookup button.
- 2. The **Select Style** window appears in the following state:
 - a. The grid is in focus with the first style highlighted.
 - **b.** All buttons are active.
- **3.** Work with the style listing as needed:
 - a. Create new styles.
 - **b.** Open/modify styles.
 - c. Copy styles.
 - d. Filter the style listing.
- 4. Highlight the style you want to use, and choose Select.
- **5.** The **Style** field appears with the selected style populated the field.

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.
Channels to Actors	Style Field – Lookup

·-	
Open Issues	None.
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.
Subordinates	10.2.1 Manage Styles – List Styles 10.2.2 Manage Styles – Create New Style 10.2.3 Manage Styles – Copy Existing Style 10.2.4 Manage Styles – Modify Existing Style

12.1.8. Select Portal Supporting Pages [Ph1]

Goal in Context	Select a supporting page for a Supporting Page field.					
Scope & Level	elect Portal Supporting Page					
Preconditions	ne supporting page field is active.					
Success End Condition	he field is populated with the selected supporting page.					
Failed End Condition	The field is not populated with the selected supporting page.					
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.					
Secondary Actors	None.					
Trigger	The user chooses to select a supporting page to populate a Supporting Page field.					

- 1. From the **Supporting Page** field, click on the **Lookup** button.
- 2. The Select Supporting Page window appears in the following state:
 - **a.** The grid is in focus with the first supporting page highlighted.
 - **b.** All buttons are active.
- **3.** Work with the supporting page listing as needed:
 - a. Create new supporting pages.
 - **b.** Open/modify supporting pages.
 - c. Filter the supporting page listing.
- **4.** Highlight the supporting page you want to use, and choose **Select**.
- 5. The Supporting Page field appears with the selected supporting page populated the field.

RELATED INFORMATION

Priority	High						
Performance	minute from open to completion of select, depending on the experience of user.						
Frequency	epends on the firm's use of portals.						
Channels to Actors	upporting Page Field – Lookup						
Open Issues	None.						
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.						
Other Management Information.	None.						
Superordinates	None.						
Subordinates	10.6.1 Manage Supporting Pages – List Supporting Pages 10.6.2 Manage Supporting Pages – Create New Supporting Page 10.6.3 Manage Supporting Pages – Modify Existing Supporting Page						

12.1.9. Select Portal Theme [Ph1]

Goal in Context	ect a theme for a Theme field.					
Scope & Level	Select Portal Theme					
Preconditions	The theme field is active.					
Success End Condition	The field is populated with the selected theme.					
Failed End Condition	The field is not populated with the selected theme.					
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.					
Secondary Actors	None.					
Trigger	The user chooses to select a theme to populate a Theme field.					

- 1. From the **Theme** field, click on the **Lookup** button.
- 2. The **Select Theme** window appears in the following state:
 - a. The grid is in focus with the first theme highlighted.
 - **b.** All buttons are active.
- 3. Work with the theme listing as needed:
 - a. Create new themes.
 - **b.** Open/modify themes.
 - c. Copy themes.

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- d. Filter the theme listing.
- 4. Highlight the theme you want to use, and choose Select.
- 5. The **Theme** field appears with the selected theme populated the field.

RELATED INFORMATION

Priority	High						
Performance	1 minute from open to completion of select, depending on the experience of e user.						
Frequency	epends on the firm's use of portals.						
Channels to Actors	Theme Field – Lookup						
Open Issues	None.						
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.						
Other Management Information.	None.						
Superordinates	None.						
Subordinates	10.7.1 Manage Themes – List Themes 10.7.2 Manage Themes – Create New Theme 10.7.3 Manage Themes – Copy Existing Theme 10.7.4 Manage Themes – Modify Existing Theme						

12.1.10. Select Publication [Ph1]

Goal in Context	Select a publication for a Publication field.
Scope & Level	Select Publication
Preconditions	The publication field is active.
Success End Condition	The field is populated with the selected publication.
Failed End Condition	The field is not populated with the selected publication.
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.
Secondary Actors	None.
Trigger	The user chooses to select a publication to populate a Publication field.

- 1. From the **Publication** field, click on the **Lookup** button.
- 2. The **Select Publication** window appears in the following state:
 - a. All is selected from Source Type.
 - **b.** The grid is in focus with the first publication highlighted.

- c. All buttons are active.
- **3.** Work with the publication listing as needed:
 - a. Create new publications.
 - **b.** Open/modify publications.
 - c. Filter the publication listing.
- 4. Highlight the publication you want to use, and choose Select.
- 5. The **Publication** field appears with the selected publication populated the field.

RELATED INFORMATION

Priority	High						
Performance	1 minute from open to completion of select, depending on the experience of e user.						
Frequency	epends on the firm's use of portals.						
Channels to Actors	Publication Field – Lookup						
Open Issues	None.						
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.						
Other Management Information.	None.						
Superordinates	None.						
Subordinates	8.1.1 Publishing Items – Publish Item 8.1.2 Publishing Items – Modify Existing Publication 10.8.1Manage Publications – List Publications						

12.1.11. Select Publication Source [Ph1]

Goal in Context	Select a source data record from Practice Manager for publication Source field.				
Scope & Level	Select Source for Publication				
Preconditions	The Source field is active. Publication Properties DE form is defined for either a matter, entity, document, note, workflow item or timeslip.				
Success End Condition	The field is populated with the selected source data record.				
Failed End Condition	The field is not populated with the selected source data record.				
Primary Actors	Intermediate to advanced users who understand the framework of portals as defined in this portal integration.				
Secondary Actors	None.				
Trigger	The user chooses to select a source date record to populate a Source field for a publication.				

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STEPS - METHOD 1 (NEW PUBLICATION FROM A PUBLICATION LISTING)

- 1. From the Publication Listing, click New.
- 2. The **New Publication** dialog box appears in the following state:
 - a. A Practice Manager Record is selected.
 - **b.** The **OK** and **Cancel** buttons are enabled.
- 3. Choose A Practice Manager Record, and click OK.
- 4. The **Select Source for Publication** window appears in the following state:
 - a. No Source Type option is selected.
 - **b.** The grid is empty.
 - c. Select is disabled.
 - d. Cancel is enabled and in focus.
- 5. Choose a Source Type.
- 6. The grid is refreshed with the global listing-version of the selected Source Type.
- **7.** Work with the listing as needed:
 - a. Create new items.
 - **b.** Open/modify existing items.
 - **c.** Filter the listing.
- 8. Highlight the item you want to use, and choose Select.
- 9. The Source field appears with the selected item populated the field.
- **10.** The field set on the **Publication Properties** DE form is refreshed to match the field set appropriate for the selected item.

Steps – Method 2 (from the Publication Properties DE form)

- 1. From the **Publication** field, click on the **Lookup** button.
- 2. The Select Source for Publication window appears in the following state:
 - **a.** The **Source Type** option pre-selected appropriate to the source type of the existing publication. All other source types are disabled.
 - b. The grid corresponds to the Source Type, and is in focus with the current value in the Source field selected.
 - c. The Select and Cancel buttons are enabled.
- **3.** Work with the listing as needed:
 - a. Create new items.
 - **b.** Open/modify existing items.
 - c. Filter the listing.
- **4.** Highlight the item you want to use, and choose **Select**.
- **5.** The **Source** field appears with the selected item populated the field.

Priority	High
Performance	< 1 minute from open to completion of select, depending on the experience of the user.
Frequency	Depends on the firm's use of portals.

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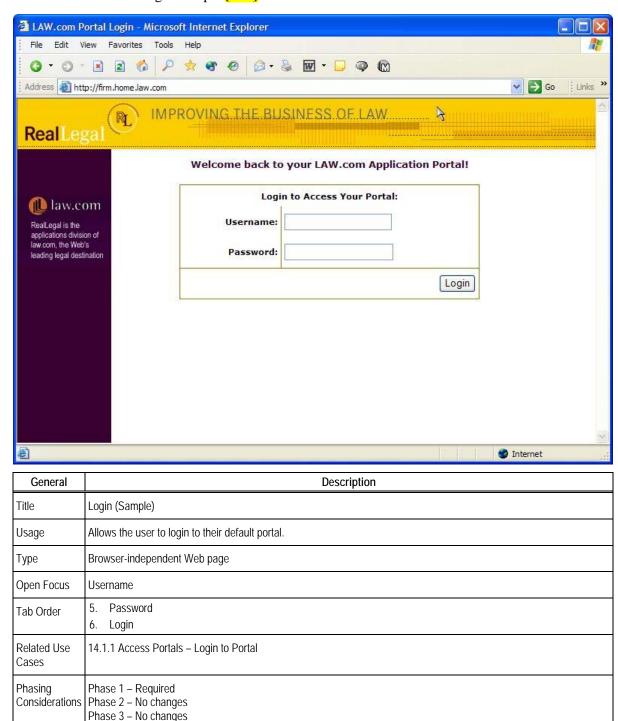
Channels to Actors	Publication Field – Lookup
Open Issues	None.
Due Date	Phase 1 – Required Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	The grid inherits the functionality of the corresponding global listing-version from Practice Manager.
Subordinates	The grid inherits the functionality of the corresponding global listing-version from Practice Manager.

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Portal Presentation

13. Portal Presentation - Mockups

13.1. Portal Presentation – Login Sample [Ph1]



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Buttons	Function / Action	Help ID	Hot Key
Login	Carries out the login validation using the username and password.	n/a	

Fields (label)	Definition	Properties	Default	UI Reqd	db Reqd	Help ID	Hot Key
Password	This is the user's password on the subdomain.			Υ	n/a		
Username	This is the username and subdomain for the user.	username@subdom ain		Υ	n/a	n/a	

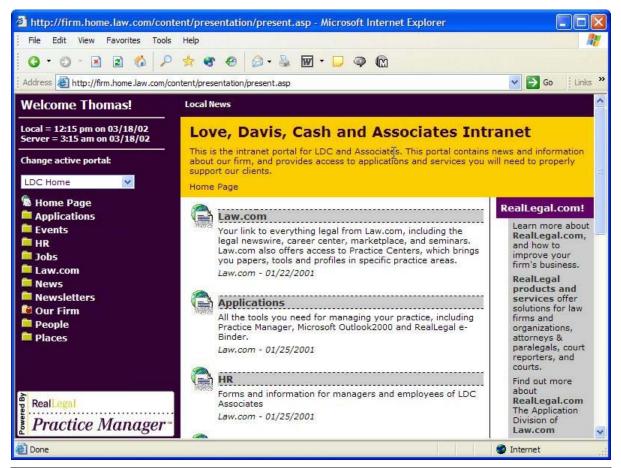
Rules and Clarifications

7. This page is not part of the portal, itself; but is, instead, provided as part of the Law.com ASP offering. There are currently no plans to allow this page to be customized, though that may be a request in the future.

Rev No.	Rev Date	Rev By	Revision Description
1.0	03/04/2002	TAF	Original Mockups – Capturede from http://firm.home.law.com .
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

13.2. Portal Presentation – Home Page Sample [Ph1]



General	Description			
Title	Portal Home Page (Sample)			
Usage	This is the portal home page, which provides access to all pages within the Site. The user can either use the menu on the left, or "drill in" by clicking on links within the home and summary pages.			
Туре	Browser-independent Web page			
Related Use Cases	14.1.2 Access Portals – Present Portal 14.1.3 Access Portals – Change Portals			
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes			

Rules and Clarifications

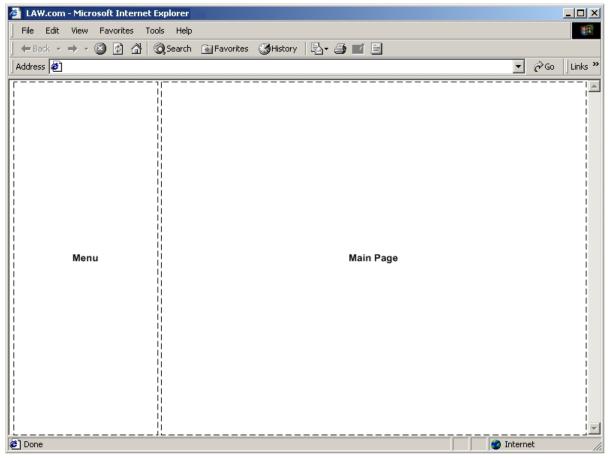
- 1. The Change Active Portal field only appears if the user is associated with more than one portal for the organization.
- 2. The menu branches can be expanded and collapsed by clicking on a folder.
- 3. When the user licks on a folder, the summary page for that folder is displayed in the Main Page frame, replacing the home page.
- 4. The target for a subscription is determined by the settings for the portal or parent folder. If **Open subscriptions in a separate** window is selected, the target is a new 640 x 480 window on top of the portal; otherwise, the target is the **Main Page** frame.

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Rev No.	Rev Date	Rev By	Revision Description
1.0	03/04/2002	TAF	Original Mockups – Captured from http://firm.home.law.com .
1.10	03/18/2002	TAF	Final mockup for development review and coding.

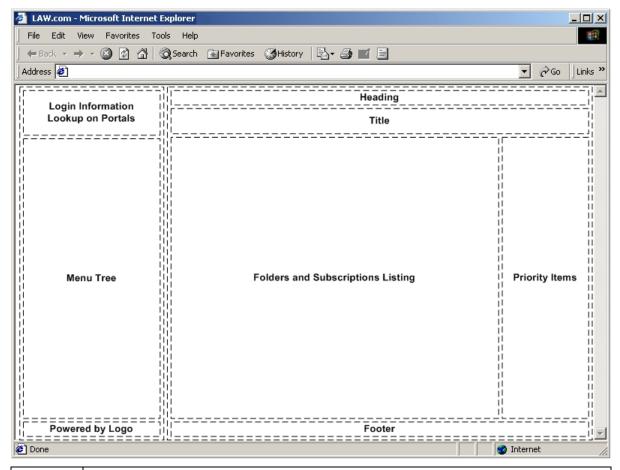
13.3. Portal Presentation – Top-level Framework [Ph1]



General	Description
Definition	This is the framework into which the menu, main page and summary pages are loaded.
Related Use Cases	14.1.2 Access Portals – Present Portal
Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Rev No.	Rev Date	Rev By	Revision Description
1.0	03/04/2002	TAF	Original Mockups – Captured from http://firm.home.law.com .
1.10	03/18/2002	TAF	Final mockup for development review and coding.

13.4. Portal Presentation – Section-level Framework [Ph1]



General	Description
Description	These are the menu, main page and summary page sections as they are loaded into the top-level framework.
Related Use Cases	14.1.2 Access Portals – Present Portal
	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Special Rules and Clarifications

1. The Login Information and Lookup on Portal section contains the following elements:

A "Welcome [user.first.name]!" message.

Local = date and time at the client (this is for worflow validation to give a means of checking the date).

Server = date and time at the server (this is for worflow validation to give a means of checking the date).

A drop-down list that identifies all portals with which the active user is associated. When a new portal is selected, the contents of the browser is refreshed; however, the user is not required to log back into the Portal. This item does not appear if the user only belongs to one portal..

- For the Menu section, if Include Icons is selected for the portal home page, display the icon-version of the image for the folder or subscription.
- For the Menu section, if Include Subscriptions is selected for the portal home page, the menu contains both folders and subscriptions..

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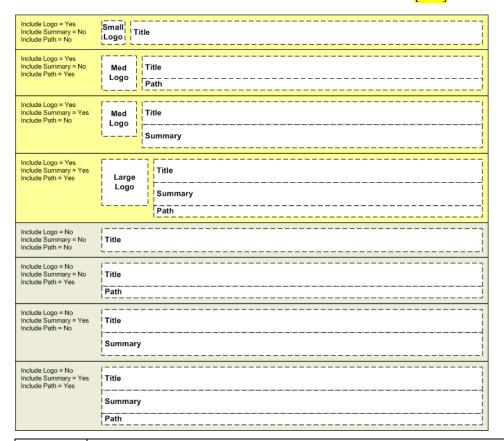
Special Rules and Clarifications

- For the Menu section, if List Folder First is selected for the portal home page, list folders first on each branch, followed by subscriptions, if included.
- 5. For the Menu section, only display the number of levels indicated in the Maximum Levels field for the portal home page.
- For the Menu section, if List Folders First is checked for the portal home page, then the folders will be sorted by the Sorting By and Sorting Order selections independent of the subscriptions.
- 7. The Powered by Logo section is a predefined element for all portals. It consists of a logo with a link to http://www.reallegal.com/.
- 8. For the **Header** section, use the code selected for the active portal, as appropriate for the page. It is possible for different summary pages to have different headers.
- 9. The construction of the Title section is defined in 13.5 Portal Presentation Section-level Framework Title Construction.
- 10. The construction of the **Folders and Subscriptions Listing** section is defined in 13.6 Portal Presentation Section-level Framework Folders and Subscriptions Construction.
- 11. The construction of the **Priority Items** section is defined in 13.7 Portal Presentation Section-level Framework Priority Items Construction.
- 12. For the **Footer** section, use the code selected for the active portal, as appropriate for the page. It is possible for different summary pages to have different headers.

	Rev No.	Rev Date	Rev By	Revision Description
1.0		03/04/2002	TAF	Original Mockup.
1.10		03/18/2002	TAF	Final mockup for development review and coding.

13.5. Portal Presentation – Section-level Framework – Title Construction [Ph1]

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General	Description	
Description	These are the construction configurations options for the Title section based on the home page or folder presentation settings.	
Related Use Cases	14.1.2 Access Portals – Present Portal	
	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes	

Special Rules and Clarifications

- 1. The appearance of the **Title** section is determined by the settings in the **Title** section on the **Presentation** page for the portal or folder, whichever is applicable to the active page displayed.
- 2. If Include Logo, Include Summary, and Include Path are checked, the presentation will use the large logo.
- 3. If Include Logo and Include Summary are checked, but Include Path is not, the presentation will use the medium logo.
- 4. If Include Logo and Include Path are checked, but Include Summary is not, the presentation will use the medium logo.
- 5. If Include Logo is checked, but Include Summary and Include Path are not, the presentation will use the small logo.
- 6. The construction of the **Summary** sub-sections is defined in 13.8 Portal Presentation Section-level Framework Summary Construction.

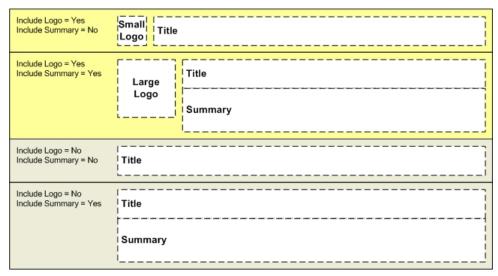
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	Rev No.	Rev Date	Rev By	Revision Description
1	.0	03/04/2002	TAF	Original Mockup.
1	.10	03/18/2002	TAF	Final mockup for development review and coding.

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13.6. Portal Presentation – Section-level Framework – Folders and Subscriptions Construction [Ph1]



General	Description
Description	These are the construction configurations options for the Folders and Subscriptions Listing section based on the home page or folder presentation settings.
Related Use Cases	14.1.2 Access Portals – Present Portal
	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

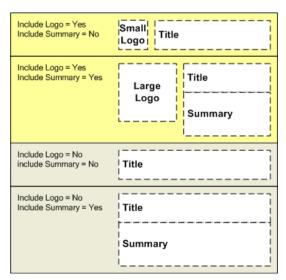
Special Rules and Clarifications

- The appearance of the Folders and Subscriptions Listing section is determined by the settings in the Folders & Subscriptions section on the Presentation page for the portal or folder, whichever is applicable to the active page displayed.
- 2. If Include Logo and Include Summary are checked, the presentation will use the large logo.
- 3. If **Include Logo** is checked but **Include Summary** is not, the presentation will use the small logo.
- 4. If List Folders First is checked, then the folders will be sorted by the Sorting By and Sorting Order selections independent of the subscriptions.
- 5. The construction of the **Summary** sub-sections is defined in 13.8 Portal Presentation Section-level Framework Summary Construction.

Rev No.	Rev Date	Rev By	Revision Description
1.0	03/04/2002	TAF	Original Mockup.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

Last Updated: 07/15/2003

13.7. Portal Presentation – Section-level Framework – Priority Items Construction [Ph1]



General	Description
Description	These are the construction configurations options for the Priorrity Items section based on the home page or folder presentation settings.
Related Use Cases	14.1.2 Access Portals – Present Portal
Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Special Rules and Clarifications

- The appearance of the Priority Items section is determined by the settings in the Priority Items section on the Presentation page for the portal or folder, whichever is applicable to the active page displayed.
- 2. If Include Logo and Include Summary are checked, the presentation will use the large logo.
- 3. If Include Logo is checked, but Include Summary is not, the presentation will use the small logo.
- The construction of the Summary sub-sections is defined in 13.8 Portal Presentation Section-level Framework Summary Construction.

Rev No.	Rev Date	Rev By	Revision Description
1.0	03/04/2002	TAF	Original Mockup.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

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13.8. Portal Presentation – Section-level Framework – Summary Construction [Ph1]

Folder Summary	Summary Text
Construction Matter	Γ====================================
Summary Construction	Summary Text Matter Number - File Number - Status Description Jurisdiction Name - Case Number - Law Type Description
Entity Summary Construction	Summary Text
Document Summary Construction	Summary Text Category Description Type Description
	Author Name] - Document Date
Note Summary Construction	Summary Text Author Name] - Type Description
Workflow Summary Construction	Summary Text Due/Meet With Date/Time - Responsible Name - Progress Workflow Type - Meet With Name Location Line 1, Line 2, Line 3, City, State, Zip
Timeslip Summary Construction	Summary Text Timeslip Date/Time] - Timekeeper Code and Name - TAMOUNT]
Weblink Summary Construction	Summary Text

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General	Description
Description	These are the construction configurations options for the Summary sub-sections based on the settings from the Subscription DE form.
Related Use Cases	14.1.2 Access Portals – Present Portal
Phasing Considerations	Phase 1 – Required Phase 2 – No changes Phase 3 – No changes

Special Rules and Clarifications

- 1. If the Summary Text is null, omit this section.
- 2. Use a space, dash and space (" ") as the separator between included data fields.
- 3. If a data field is not selected or null, omit that field as well as the preceding separator.
- 4. If all data fields on a line are not selected or null, omit that line.
- 5. Matter For Matter Number, use the following construction... "Matter Number: ######".
- 6. Matter For File Number, use the following construction... "File Number: ######".
- Matter For Status Description, use the following construction... "Status: [description]".
- 8. **Matter** For **Jurisdiction**, use the following construction... "Jurisdication: [name]".
- 9. Matter For Case Number, use the following construction... "Case Number: ######".
- 10. Matter For Law Type Description, use the following construction... "Law Type: [description]".
- 11. Matter For Case Number, use the following construction... "[nickname]".
- 12. Matter For Law Type Description, use the following construction... "Law Type: [description]".
- 13. Entity For Nickname, use the following construction... "[nickname]".
- 14. Entity For Job Title, use the following construction... "Job Title: [job title]".
- 15. Entity For Department, use the following construction... "Department: [department]".
- 16. Entity For Parent Organization Name, use the following construction... "[parent organization full name]".
- 17. Entity For DBA, use the following construction... "DBA: [dba]" (organization entities only).
- 18. Entity For the Primary Address, use the followingn construction... "Primary Address: [line1, line2, line3, city, state, zip]"
- 19. **Entity** For **Primary Phone Numbers**, use the followingn construction... "Phone: [phone1] Ext. [ext1] Phone 2: [phone2] Ext. [ext2] Fax [fax]"
- 20. Entity For Direct Phone Numbers, use the following construction... "Direct: [direct] Ext. [ext1] Fax. [fax] Mobile: [mobile] Ext. [ext2] Pager [pager]"
- 21. **Entity** For **e-Mail Address**, use the following construction... "<a href=<u>mailto:[email]</u>>email ...where the HTML code is hidden, and the address is a hyperlink.
- 22. **Entity** For **Web Address**, use the following construction... "web_address ...where the HTML code is hidden, and the address is a hyperlink.
- 23. Document For Category Description, use the following construction... "Category: [description]".
- 24. Document For Type Description, use the following construction... "Type: [description]".
- 25. Document For Author Name, use the following construction... "Author: [code], [full entity name]".
- 26. **Document For Document Date**, use the following construction... "Date: [date]".
- 27. Note For Author Name, use the following construction... "Author: [code], [full entity name]".
- 28. Note For Type Description, use the following construction... "Type: [description]".
- 29. Workflow For Due/Meet With Date/Time, use the following construction... "Due/Meet With: [date/time]".
- 30. Workflow For Responsible Name, use the following construction... "Responsible: [code], [full entity name]".
- 31. Workflow For Progress, use the following construction... "Progress: [progress]".

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Special Rules and Clarifications

- 32. Workflow For Workflow Type, use the following construction... "Type: [description]".
- 33. **Workflow** For **Meet With Name**, use the following construction... "Meet With: [full entity name]" ...if there is more than one, separate each entry with a comma.
- 34. Workflow For the Location, use the followingn construction... "Location: [line1, line2, line3, city, state, zip]"
- 35. Timeslip For Timeslip Date, use the following construction... "Date: [date]".
- 36. Timeslip For Timekeeper Code and Name, use the following construction... "Timekeeper: [code], [full entity name]".
- 37. Timeslip For Amount, use the following construction... "Amount: [amount with appropriate puncuation]"

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1.0	03/04/2002	TAF	Original Mockup.
1.10	03/18/2002	TAF	Final mockup for development review and coding.

14. Portal Presentation – Use Cases

14.1. Access Portals

14.1.1. Access Portals – Login to Portal [Ph1]

Goal in Context	Log in to the firm's default portal.
Scope & Level	Same.
Preconditions	The portal has been created. The firm as a default portal selected. The user has an account. The user has a functional security assignment for the site of portal. The user is included in the site for which the portal was created if Site Security is enabled. The user is included in the portal if Matter Security is enabled.
Success End Condition	The default portal home page appears.
Failed End Condition	The default portal home page does not appear.
Primary Actors	Any user.
Secondary Actors	None.
Trigger	The user chooses to access the firm's portal site.

- 1. Start the Web browser software on the client machine.
- 2. Enter the Base Domain URL from Portal Settings in the Address/Location field of the browser (this can also be carried out by clicking on a hyperlink in an e-mail or on a Web page, or using a bookmark entry in the browser).
- 3. The login page for the organization appears.
- Enter the User Name provide by the organization. This is the same as the user's Login Name in Practice Manager.
- **5.** Enter the **Password**. This is the same as the password the user would use to access Practice Manager.
- 6. Click Submit.
 - a. If the user name and password are validated as correct, the portal home page is presented.
 - **b.** If the user name and password are validated as incorrect, the login page appears again. The user can attempt to login three times before the login processes blocks them from attempting again for a period of 15 minutes.

RELATED INFORMATION

Priority	Hight
Performance	<1 minute from the time the URL is entered to the time the home page begins to be loaded. This is dependent upon the user's experience level, as well as the connection speed to the portal Web server.
Frequency	Could be very high, depending on a firm's usage of portals.
Channels to Actors	Web browser.
Open Issues	How do firms define their login pages?
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.
Subordinates	14.1.2 Access Portals – Present Portal

14.1.2. Access Portals – Present Portal [Ph1]

Goal in Context	Display a portal created for the firm.
Scope & Level	Same.
Preconditions	The portal has been created. The user has successfully logged into the portal Web site.
Success End Condition	The portal home page appears.
Failed End Condition	The portal home page appears.
Primary Actors	Any user.
Secondary Actors	None.
Trigger	The user chooses to access a portal.

STEP 1 - CONSTRUCT THE MAIN FRAMEWORK

- 1. The left frame is for the Menu.
- 2. The right frame is for the Main Page.

STEP 2 - BUILD THE MENU

- In the <head> section of the Menu, place the Style Code from the Menu component of the Style selected for the page.
- 2. In the top **<iframe>** of the **Menu** body, place the log in information:
 - a. Place the text "Welcome [user.firstname]!"
 - **b.** Place a horizontal line.

- Place "Local = " followed by the local (client) date and time in HH:MM AM/PM MM/DD/YY format.
- d. Place "Server = " followed by the server date and time in HH:MM AM/PM MM/DD/YY format.
- **e.** If the user is associated with more than one portal, place "Change active portal:" followed by a drop-down list showing the **Label** from each active portals the user is associated with, sorted in alphabetical order.
- f. This frame should be set to refresh every 60 seconds.
- In the middle <iframe> of the Menu body, place the menu component, collapsed to the first layer.
 - a. Use the Label for the portal and folders.

- The folder label is a link to the summary page for the folder, which opens in the Main Page.
- ii. The folder label is also used to expand and collapse the branch under the folder.
- **b.** If **Include Subscriptions** is selected for the portal **Presentation**, include subscriptions along with the folders, using the subscription **Title** as the menu item.
 - The subscription title is a link to the source for the publication associated with the subscription.
 - (1) If Open Subscriptions in Separate Window is selected for the parent folder of the subscription, the target is a new 640 x 480 window on top of the portal.
 - (2) If Open Subscriptions in Separate Window is not selected for the parent folder of the subscription, the target is the Main Page frame.
- c. If Include Icons is selected for the portal Presentation, use the icon-version of the image for the item.
 - i. If the item is a folder...
 - (1) The icon is a link to the folder summary page, which opens in the **Main Page**.
 - (2) The icon is also used to expand and collapse the branch under the folder.
 - **ii.** If the item is a subscription, the icon is a link to the source for the publication associated with the subscription.
 - (1) If Open Subscriptions in Separate Window is selected for the parent folder of the subscription, the target is a new 640 x 480 window on top of the portal.
 - (2) If Open Subscriptions in Separate Window is not selected for the parent folder of the subscription, the target is the Main Page frame.
- **d.** If **List Folders First** is selected for the portal **Presentation**, folders are listed at the top of the menu or menu branch, followed by subscriptions.
- e. Sort the Folder and Subscription Listing for the portal:
 - If None is selected in the Sorting By field for the portal Presentation, sort the menu by the ID of the folder/subscription.
 - (1) If List Folders First is selected for the portal **Presentation**, sort the folders then the subscriptions.
 - ii. If Alphabetical is selected in the Sorting By field for the portal Presentation, sort the menu in alphabetical order by folder Label or subscription Title.
 - (1) If Ascending is selected in the Sorting Order field for the portal Presentation, sort the menu in ascending order.
 - (2) If Descending is selected in the Sorting Order field for the portal Presentation, sort the menu in descending order.
 - (3) If List Folders First is selected for the portal **Presentation**, sort the folders then the subscriptions.

- iii. If Chronological is selected in the Sorting By field for the portal Presentation, sort the menu in chronological order by the subscription Creation Date.
 - (1) If **Ascending** is selected in the **Sorting Order** field for the portal **Presentation**, sort the menu in ascending order.
 - (2) If **Descending** is selected in the **Sorting Order** field for the portal **Presentation**, sort the menu in descending order.
 - (3) If List Folders First is selected for the portal **Presentation**, sort the folders then the subscriptions.
- f. If Generate a Site Map of the Portal is selected as a portal Option and a link is to be placed on the Menu, add that link at the end of menu on the first level of folders and content
- In the bottom <iframe> of the Menu body, place the "powered by" logo, linked to http://www.reallegal.com.

STEP 3 - BUILD THE MAIN PAGE FRAMEWORK

- **1.** The top frame is for the **Header**.
- 2. The middle frame is for the Content.
- 3. The bottom frame is for the Footer.

STEP 4 - BUILD THE HEADER

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- In the <head> section of the Header, place the Style Code from the Header component of the Style selected for the page.
- 2. In the <body> section of the Header, place the Code from the Header selected for the page.
- If Generate a Site Map of the Portal is selected as a portal Option and a link is to be placed on the Header, add that link at the end of the Code from the Header selected for the page.

STEP 5 – BUILD THE CONTENT FRAMEWORK (TABLE)

- In the <head> section of the Content, place the Style Code from the Content component of the Style selected for the page.
- 2. In the **<body>** section of the **Content**, create a 2-row, 2-column table:
 - a. Row 1 spans both columns and will hold the Title.
 - b. Row 2 consists of a 75% column for the Folder and Subscription Listing, and a 25% column for Priority Items.

STEP 6 - BUILD THE CONTENT TITLE

- 1. In the **Title** table cell, construct the title.
 - a. If Include Logo is selected, create a 2-column table inside the Title table cell.
 - i. Place the logo in the first cell:
 - (1) If **Include Summary** and **Include Path** are selected, use the large logo-version of the selected image.
 - (2) If Include Summary is selected but Include Path is not, use the medium logoversion of the selected image.
 - (3) If Include Path is selected but Include Summary is not, use the medium logoversion of the selected image.
 - (4) If neither Include Summary or Include Path are selected, use the small logoversion of the selected image.
 - ii. Place the title in the second cell.
 - (1) If Include Summary is selected, place the summary under the title.

- (2) If Include Path is selected by Include Summary is not, place the path to the page under the title.
- (3) If Include Summary and Include Summary is selected, place the path to the page under the summary.
- **b.** If **Include Logo** is not selected, place the title in the **Title** table cell.
 - i. If Include Summary is selected, place the summary under the title.
 - ii. If Include Path is selected by Include Summary is not, place the path to the page under the title.
 - **iii.** If **Include Summary** and **Include Summary** is selected, place the path to the page under the summary.

STEP 7 - BUILD THE FOLDERS AND SUBSCRIPTION LISTING

- 1. Sort the Folder and Subscription Listing for the current page:
 - a. If None is selected in the Sorting By field for the portal Presentation, sort the listing by the ID of the folder/subscription.
 - If List Folders First is selected for the portal Presentation, sort the folders then the subscriptions.
 - b. If Alphabetical is selected in the Sorting By field for the portal Presentation, sort the content in alphabetical order by folder Label or subscription Title.
 - If Ascending is selected in the Sorting Order field for the portal Presentation, sort the content in ascending order.
 - ii. If Descending is selected in the Sorting Order field for the portal Presentation, sort the content in descending order.
 - iii. If List Folders First is selected for the portal Presentation, sort the folders then the subscriptions.
 - c. If Chronological is selected in the Sorting By field for the portal Presentation, sort the content in chronological order by the subscription Creation Date.
 - If Ascending is selected in the Sorting Order field for the portal Presentation, sort the content in ascending order.
 - **ii.** If **Descending** is selected in the **Sorting Order** field for the portal **Presentation**, sort the content in descending order.
 - **iii.** If **List Folders First** is selected for the portal **Presentation**, sort the folders then the subscriptions.
- 2. In the **Folder and Subscription Listing** table cell, construct the list of folders and subscriptions for the current page.
 - a. If Include Logo is selected, create a 2-column table inside the Folder and Subscription Listing table cell with as many rows as there are folders and subscriptions for the page.
 - **i.** Beginning with the first content item, as sorted, place the logo for that item in the first cell of the first row:
 - (1) For folders, the logo is a link to the summary page for that folder, which opens in the **Main Page**.
 - (2) For subscriptions, the logo is a link to the source for the publication associated with the subscription.
 - (a) If Open Subscriptions in Separate Window is selected for the parent folder of the subscription, the target is a new 640 x 480 window on top of the portal.
 - **(b)** If **Open Subscriptions in Separate Window** is not selected for the parent folder of the subscription, the target is the **Main Page** frame.

- (3) If Include Summary is selected, use the large logo-version of the selected image.
- **(4)** If **Include Summary** is not selected, use the small logo-version of the selected image.
- ii. Place the title in the second cell of the first row.
 - (1) For folders, the title is a link to the summary page for that folder, which opens in the **Main Page**.
 - **(2)** For subscriptions, the title is a link to the source for the publication associated with the subscription.
 - (a) If Open Subscriptions in Separate Window is selected for the parent folder of the subscription, the target is a new 640 x 480 window on top of the portal.
 - **(b)** If **Open Subscriptions in Separate Window** is not selected for the parent folder of the subscription, the target is the **Main Page** frame.
 - (3) If Include Summary is selected, place the summary under the title.
 - (a) If Summary Include options are selected for the item, construct those in accordance with the layout provide in 13.8 Portal Presentation – Sectionlevel Framework – Summary Construction, and place them after the summary text.
- iii. Repeat needed for each folder and subscription.
- b. If Include Logo is not selected, build the Folder and Subscription Listing in the table cell.
 - i. Beginning with the first content item, as sorted, place the title.
 - (1) For folders, the title is a link to the summary page for that folder, which opens in the **Main Page**.
 - (2) For subscriptions, the title is a link to the source for the publication associated with the subscription.
 - (a) If Open Subscriptions in Separate Window is selected for the parent folder of the subscription, the target is a new 640 x 480 window on top of the portal.
 - **(b)** If **Open Subscriptions in Separate Window** is not selected for the parent folder of the subscription, the target is the **Main Page** frame.
 - (3) If Include Summary is selected, place the summary under the title.
 - (a) If Summary Include options are selected for the item, construct those in accordance with the layout provide in 13.8 Portal Presentation Section-level Framework Summary Construction, and place them after the summary text.
 - ii. Repeat as needed for each folder and subscription.

STEP 8 - BUILD THE PRIORITY ITEMS LISTING

- 1. Sort the **Priority Items Listing** for the current page:
 - a. If None is selected in the Sorting By field for the portal Presentation, sort the listing by the ID of the folder/subscription.
 - **b.** If **Alphabetical** is selected in the **Sorting By** field for the portal **Presentation**, sort the priority items in alphabetical order by subscription **Title**.
 - If Ascending is selected in the Sorting Order field for the portal Presentation, sort the priority items in ascending order.
 - **ii.** If **Descending** is selected in the **Sorting Order** field for the portal **Presentation**, sort the priority items in descending order.

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- c. If Chronological is selected in the Sorting By field for the portal Presentation, sort the priority items in chronological order by the subscription Creation Date.
 - If Ascending is selected in the Sorting Order field for the portal Presentation, sort the priority items in ascending order.
 - ii. If Descending is selected in the Sorting Order field for the portal Presentation, sort the priority items in descending order.
- 2. In the **Priority Items Listing** table cell, construct the list of priority items for the current page.
 - a. If Include Logo is selected, create a 2-column table inside the Priority Items Listing table cell with as many rows as there are priority items for the page.
 - Beginning with the first priority items item, as sorted, place the logo for that priority items in the first cell of the first row:
 - (1) If Include Summary is selected, use the large logo-version of the selected
 - (2) If Include Summary is not selected, use the small logo-version of the selected
 - Place the title in the second cell of the first row.
 - (1) If **Include Summary** is selected, place the summary under the title.
 - (a) If Summary Include options are selected for the item, construct those in accordance with the layout provide in 13.8 Portal Presentation - Sectionlevel Framework - Summary Construction, and place them after the summary text.
 - iii. Repeat as needed for each priority items.
 - b. If Include Logo is not selected, build the Priority Items Listing in the table cell.
 - Beginning with the first priority items item, as sorted, place the title.
 - (1) For priority items, the title is a link to the source for the publication associated with the priority.
 - (a) If Open Priority Items in Separate Window is selected for the parent folder of the priority item, the target is a new 640 x 480 window on top of the portal.
 - (b) If Open Priority Items in Separate Window is not selected for the parent folder of the priority item, the target is the Main Page frame.
 - (2) If Include Summary is selected, place the summary under the title.
 - (a) If Summary Include options are selected for the item, construct those in accordance with the layout provide in 13.8 Portal Presentation - Sectionlevel Framework - Summary Construction, and place them after the summary text.
 - ii. Repeat needed for each priority item.

STEP 9 - BUILD THE FOOTER

- 1. In the <head> section of the Footer, place the Style Code from the Footer component of the Style selected for the page.
- 2. In the **<body>** section of the **Footer**, place the **Code** from the **Footer** selected for the page.
- 3. If Generate a Site Map of the Portal is selected as a portal Option and a link is to be placed on the Footer, add that link at the end of the Code from the Footer selected for the page.

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RELATED INFORMATION

Priority	Hight
Performance	<1 minute from the time the URL is entered to the time the home page begins to be loaded. This is dependent upon the user's experience level, as well as the connection speed to the portal Web server.
Frequency	Could be very high, depending on a firm's usage of portals.
Channels to Actors	Web browser.
Open Issues	How do firms define their login pages?
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.
Subordinates	14.1.2 Access Portals – Present Portal

14.1.3. Access Portals – Change Portals [Ph1]

Goal in Context	Change the active portal.
Scope & Level	Same.
Preconditions	The portal has been created.
	The firm as a default portal selected.
	The user has an account.
	The user has a functional security assignment for the site of portal.
	The user is included in the site for which the portal was created if Site Security is enabled.
	The user is included in the portal if Matter Security is enabled.
	The user is associated with more than one portal for the organization.
Success End Condition	The home page for the selected portal appears.
Failed End Condition	The home page for the selected portal do not appear.
Primary Actors	Any user.
Secondary Actors	None.
Trigger	The user chooses to change the active portal.

- 1. From the menu, choose a portal from the drop-down list below **Change active portal**.
- 2. The contents of the Web browser is cleared, and the new portal is loaded beginning with the top-level framework.

RELATED INFORMATION

Priority	Hight
Performance	<1 minute from the time the URL is entered to the time the home page begins to be loaded. This is dependent upon the user's experience level, as well as the connection speed to the portal Web server.
Frequency	Could be very high, depending on a firm's usage of portals.
Channels to Actors	Web browser.
Open Issues	None.
Due Date	Phase 1 – Required. Phase 2 – No changes. Phase 3 – No changes.
Other Management Information.	None.
Superordinates	None.
Subordinates	14.1.2 Access Portals – Present Portal

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