Practice Manager - Pumasillo Project

Functional Design Specifications v2.0

Created on March 21, 2003
by Thomas A. Foley

Revision No. 9

Last Saved on March 21, 2003
By Thomas A. Foley

The electronic form of this document can be found in c:\documents and settings\tfoley\my documents\rl.stuff\dev\pm_core\andes\pm88.pumasillo\specs \pumasillo_fds_v0200.doc

RealLegal
Practice Manager™

Practice Manager - Pumasillo Project • Functional Design Specifications v2.0

Created on March 21, 2003
By Thomas A. Foley.

Revision No. **9**, Last Saved on **March 21, 2003**
By Thomas A. Foley

For additional information, contact:

RealLegal, LLC

Market Place, Tower 2 - 12th Floor
3025 South Parker Road
Aurora, CO 80014

Tel: 888.584.9988
Tel: 303.584.9988
Fax: 303.584.8984

Sign-off

Name/Title	**Rick Huszagh**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Cynthia Hobday**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Ken Fusco**
Signature/Date	
	Reviewed with QA Team ❑ Yes ❑ No ❑ Not Applicable
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Lee Childs**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Ron Coffee**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Steve Heller**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Darius Kirna**
Signature/Date	
	Reviewed with Presentation Team ❑ Yes ❑ No ❑ Not Applicable Reviewed with Integrations Team ❑ Yes ❑ No ❑ Not Applicable Reviewed with Business Team ❑ Yes ❑ No ❑ Not Applicable Reviewed with Custom Team ❑ Yes ❑ No ❑ Not Applicable
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Arturas Zaborskis**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Aurelija Vingyte**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Donatas Barkauskas**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Name/Title	**Saulius Kundrotas**
Signature/Date	
	❑ Prepared By ❑ Accepted in Current State ❑ Accepted with Noted Revisions ❑ Rejected ❑ Other (please indicate)
Comments	

Change History

Version No.	Date	Name	Description of Changes
v1.0	07/11/2002	Tom Foley	Original Version.
v1.1	07/16/2002	Tom Foley	Comments from Lee's e-mail dated 7/15/2002. Q&A from Saulius' e-mail with Lee dated 07/15/2002. PCR Numbers from Daiva dated 07/15/2002.
v1.2	07/17/2002	Tom Foley	Added Ricky's comments.
v1.3	07/23/2002	Tom Foley	Added Steve's comments. Replaced Steve's e-mail in 8.1.1 (also added this to the spec folder). Added additional comments from Lee and Tom re:Authentication Service Integration.
V2.0	03/21/2003	Tom Foley	Merging of Pumasillo (PM87 SP3) with the Chimborazo Code Base (Alpha2).

Contents

Practice Manager - Pumasillo Project • Functional Design Specifications v2.0

1. Introduction

Refer to the Project Summary Specification (PSS) for a detailed discussion of the following:

- External References
- Definition of Terms
- Project Overview
- Project History (Builds)
- Scope
- Project Organization
- Roles / Responsibility
- Scope Management
- Issue Tracking Management
- Quality Review Management
- Monitoring Mechanisms
- Deliverables
- Project Plan
- High-Level Project Plan

2. Security Considerations

To be updated.

3. New General Feature and Updates in PM

1. Add the ability to include an ActiveX or Web browser form on the desktop views (PCRs 14741, 14743, and 14745).
2. In Matter Settings, add new "General" tab in the first position and move all matter-specific system settings to that tab (PCR 12708).
3. In Entity Settings, add new "General" tab in the first position and move all entity-specific system settings to that tab (PCR 12709).
4. In Document Settings, rename "Options" to "General", and move to be in the first position. Move all document-specific system settings to that tab (PCR 12710).

5. In Document Assembly Settings, rename "Options" to "General", and move to be in the first position (PCR 12711).

6. In Timeslip Settings, move "General" to be in the first position (PCR 12712).

7. In Groupware Settings, rename "Options" to "General", and move to be in the first position (PCR 12713).

8. In Workflow Settings, add new "General" tab in the first position and move all workflow-specific system settings to that tab (PCR 12714).

9. In Note Settings, add new "General" tab in the first position and move the Phone Call Settings field to that tab (PCR 12715).

10. Update the System Settings for “Client Requires Number” to have a separate option for “Billable Requires Number”. Implement as follows (PCR 13226):

    a. Always show the Code field for entities, so users can enter whatever they want whenever they want.

        i. It is required if the entity is Staff or User.

        ii. It is required based on System Settings for Client and Billable.

    b. 2. Have two System Settings:

        i. [_] Client Entity Requires Number (Code)

            (1) If this is checked and the entity is a Client, then the Code field is required.

            (2) If the entity is a Client and auto-numbering is enabled, it is available for the Code field.

        ii. [_] Billable Entity Requires Number (Code)

            (1) If this is checked and the entity is a Billable, then the Code field is required.

            (2) If the entity is Billable and auto-numbering is enabled, it is available for the Code field.

    c. 3. For upgrade, do the following for System Settings:

        i. If "Client OR Billable" and "Client Entity Requires Number" are checked, also check "Billable Entity Requires Number"; otherwise, leave blank.

        ii. If "Client AND Billable" and "Client Entity Requires Number" are checked, also check "Billable Entity Requires Number"; otherwise, leave blank.

        iii. If "Client" and "Client Entity Requires Number" are checked, don't check "Billable Entity Requires Number".

        iv. If "Billable" and "Client Entity Requires Number" are checked, check "Billable Entity Requires Number"; otherwise, leave blank.

11. Add Other Party, Other Party’s Phone Number and Message text as available columns in the Notes Global listing (PCR 14002).

12. For firms upgrading from PM86 SP2 or earlier, automatically assign securities created in PM87 using the agreed upon auto-assign rules (PCR 14202).

13. Ability to "Save Grid Layout" in "Related Matters" dialog box (PCR 14384).

14. Update the Save As functionality for list printing to by-pass QuickReports limitation on only saving what is in the preview -- all selected columns should be saved to the file (PCR 14469).

4. RealLegal Authentication Service 1.0 Requirments for SP1

This section describes the changes necessary for the incorporation of the RealLegal Authentication Service, version 1.0, into the Practice Manager login process.

4.1. Definitions

4.1.1. SECUSER

A SECUSER is a Practice Manager entity with ENTITIES.ENTITYCATEGORY set to one; meaning that functional, matter, and site securities can be specified on the entity. In order to login to Practice Manager the entity must also be specified as a PMUSER.

4.1.2. PMUSER

A PMUSER is a SECUSER with permission, defined in DATASVC_ASSIGNMENT, to login to the Practice Manager product given a SOURCE_ID and SITE_ID. If the entity does not have this right then they are defaulted to WEBONLY.

4.1.3. WEBONLY

A WEBONLY user is a SECUSER without permission, defined in DATASVC_ASSIGNMENT, to login to the Practice Manager product. Instead the user may have zero or more permissions to login to Practice Manager modules such as Reporting, Portal, or Budgeting.

4.1.4. Web Service

All web services are Practice Manager modules and will be registered with the INTENGINE_INTEGRATION table. A new SOURCE_ID will be added to that table that links an integration with a source managed by the DATASVC database.

Thus, when a WEBONLY user is created the entity data entry dialog will first update/create the user through the AUTHAPI and in the case of a new user it will ask the AUTHAPI to set permissions on each web service module by first building a list of modules from the INTENGINE_INTEGRATION table that contain sources and then feeding that list to the AUTHAPI.

4.2. General Changes

1. The meaning of ENTITIES.ENTITYCATEGORY will change. In the past when the value of this field was one for a user, it indicated that user had permission to login to Practice Manager. It now indicates only that the user is a SECUSER.
   (PCR 10351)

2. The entity data entry dialog will include a new option for specifying a user as a WEBONLY user.
   (PCR 10352)

3. A new dialog will be created to assign users login permission to Practice Manager and/or any other Web Service module.
   (PCR 10353)

4. A test will be done on an authenticated user when logging into Practice Manager to validate that the user has permission to login; regardless of whether their underlying credentials are valid. (PCR 10354)

5. Practice Manager will make direct calls the AUTHAPI which will wrap all calls to the DATASVC database through ADO. The AUTHAPI will map all PMWIN users to accounts in the DATASVC database, construct ORGUNITS as needed, and assign product permissions to those users.
(PCR 10355)

6. The DATASVC database will be installed by default.
(PCR 10356)

7. Practice Manager and the PMWINDB will be registered with the DATASVC database.
(PCR 10357)

8. All modules will need to be updated to register themselves in the DATASVC database.
(PCR 10358)

9. The INTENGINE database will be installed by default.
(PCR 10359)

10. The Client Integration Manager will be installed by default on all clients.
(PCR 10360)

11. Practice Manager will make direct calls to the INTENGINE_INTEGRATION table to determine which modules are installed in order to present the list of modules during user permission assignment.
(PCR 10361)

12. The RealLegal.CAAPICORE.dll must be installed into $Program Files\Common Files\RealLegal and registered on the Workstation Install. [added by Lee 07/16/2002] (PCR 10408)

13. The $System32\RealLegal.DataService.Udl must be created by the Workstation installation; it specifies the location of the RLENTERPRISE database. This is required because the AuthAPI uses ADO as a temporary solution for SP1. The install must gather the location of the server, name of the database, and NT or SQL login information. NT is preferred because the SQL password would be stored with the UDL. [added by Lee 07/16/2002] (PCR 10409)
LEE this UDL file must be stored on the network. Otherwise it is a nightmare to administer [Added by Ricky 07/17/2002]

4.3. Q&A

4.3.1. Message Forum Topics

4.3.2. From Saulius, dated 07/15/2002

1. In install part there are talking about ENTITIES.DOMAIN field. Entities table have the most fields I think in PMWIN, and I don't think it is very good idea to add one more. Why we can not use LOGIN field?

   [Lee 07/15/2002] The requirement is simply that when using NT security that all users have a DOMAIN in their login. We currently do not keep that information. When using SQL no domain is needed. Whether you do it in DOMAIN or LOGIN does not matter; except that if you place it into LOGIN and concatenate it with the USERNAME then it is more difficult (slower) to filter by DOMAIN.

Note: There is an 8000 byte limit on a SQL row (TEXT, NTEXT, IMAGE use pointers). If we are approaching 8000 characters then some fields (new fileds) would need to be moved to a new 1-1 table.

[Saulius 07/16/2002] So how I understood you offer:

1. Add DOMAIN field to ENTITIES table.

2. Add DOMAIN field to UI in ENTITY DE which will be always required(and for SQL auth and for NT auth).

I understood correct?

[Lee Childs 07/16/2002 from e-mail]
Domain is not needed in the case of SQL authentication.

Tom in Rushmore we need to move user specific fields out of entities into its own table. It is creating a lot of wasted space. [Ricky 07/17/2002] (PCR TBD)

2. User can be assigned to different sites from Security settings and from Entity DE, everywhere there should be cared to call AUTHAPI? And more - this assignment to RLENTERPRISE should be based on site security or somehow and on function security? Can we say that assignment in RLENTERPRISE should be sinchronized with SITESEC assignments in PMWIN?

   [Lee 07/15/2002] We sycnhronize login access with RLENT by site. If assigning an entity to a site grants them login permission then anywhere that happens it would need to be synced.

   [Saulius 07/16/2002] Assignment only to SITESEC is NOT enough to login into PMWIN. User must have additionally and FUNCSEC assignments. OK, I understood that assignment in RLEnterprise mean, that user should have login right to PMWIN. What with all other modules(Portal, etc...)? When I create entity it will be allowed to connect to all integrations. From where these rights will be changed?

   [Lee Childs 07/16/2002] In Tom's FDS for SP1 it contains a new user interface for assigning functional securities to pmwin and modules. This is where that sync would/should occur. When you create an entity though; he should not be given any login permissions except to PMWIN. The admin must manually set those permisssions (this is my understanding – right Tom?)

   [TAF 07/23/2002] Access to modules/integrations is now controlled through Functional Security. If there is an installed module/integration that does not have security, the user will have access to that module/integration.

3. What message should come up when user will have no rights in RLENTERPRISE?

   [Lee 07/15/2002] You mean if a user logs in to PMWIN and authenticates; but fails the login permission check against RLENTERPRISE?

[Saulius 07/16/2002] Yes. If we checking site to witch user logins, then authentication call should be after user chose site or I should get from AUTHAPI list of sites to which some user can login, as is now in PMWIN.

4. And one more thought... users can be created not only from PMWIN application, but and from some ASP environment. There will be implemented synchronization with RLENTERPRISE DB? (Question added by Saulius 07/16/2002)

5. Tom we also need to queue up another release of our ASP Client Generation Code that we created for AMFAM. Can you enter a PCR for this so I make sure this is addressed for SP1 [Ricky 07/17/2002] (PCR TBD)

5. Integration Engine Install/Upgrade Requirements for SP1

This section describes the changes necessary for the incorporation of the RealLegal Integeration Engine, version 1.1, into the Practice Manager install and upgrade process.

5.1. Network Installation (PCR 10362)

1. In the past the Integration Engine was optional. As of Service Pack 1 it will be installed as a core component of Practice Manager. Refer to Massive Install Update for more information.

2. No new server side components will be installed; except as needed by the installation for temporary use. Those components will run on Windows 95 and above.

3. The network installation will first install the N-Tier Framework for Practice Manager on NT. This installation component will install the RLENTERPRISE database and the AUTHAPI. It will not install any of the Windows 2000 components requiring COM+. The network install for version 8.7 is required to support Windows 98 and higher.

   It will then need to install the Practice Manager database as normal followed by the Integration Engine 1.1 which will install the integration engine data structure.

   Finally it will need to use the AUTHAPI to register Practice Manager as a product and as a source in the RLENTERPRISE database. The AUTHAPI will return a valid SOURCE_ID which the installation should use to populate a field in the SETTINGS table.

4. The DSHCOM component will need to be installed and registered temporarily to assist in the registration of the source and product.

   The DSHCOM needs the following information:

   a. The ADO connection string to the DATASVC database.

   b. The ADO connection string to the PRODUCT database.

   c. The name of the internal organizational unit to create for (row-level) or (web-only) users. This is a temporary measure. A better unit solution will be available in a future release.

   d. The name of the data source; for example "Practice Manager: Law firm Name"; eventually when an user has access to multiple Practice Manager databases a dialog will present these names and allow the user to select the appropriate one. The license key for the source. A discussion needs to be had whether to hardcode the license or not.

5. Intall program will have to ask for a domain name of SETTINGS.AUTOLOGIN=2 (NT Authentication) mode is turned on. It will have to update ENTITIES.DOMAIN field with that value for all entities where ENTITY.ENTITYCATEGORY=1.

5.2. Client Installation (PCR 10363)

1. The Client Integration Manager (CIM) will be installed on all clients by default with Service Pack 1 and future releases of Practice Manager.
2. All workstations will now have the Client Integration Manager, the Authentication API (AUTHAPI), and RealLegal XML 2.0 (RLXML2) installed.
3. SOAP will not be required. The report viewer integration is the first component based on the N-Tier Framework for Practice Manger.

6. Functional Security – Assign Functions UI Update

This update to the Function Security Assign Function UI update takes advantage of the data structure added in PM 8.7, and the methods by which integrations can now publish new functional security operations to Practice Manager. As part of this UI update, the list of operations, both available and selected, will now be displayed in a treeview. For SP1, the top-level branches will be Practice Manager and then each Integration, listed by name. Under each branch will be the operations specific to that product.

In a future release of Practice Manager, the ability to create operation groups to better group operations will be added. Likewise, dependency checking will be added based on the grouping, so that when someone selects an operation, Practice Manager will check to see if the user will have the appropriate prerequisite operations for carrying out the selected operation. This work is beyond the scope of this project; however, it is anticipated that the UI and data structure will be easily extended to support this model. Does this also mean you cannot assign a functional security to a group that has a member that does not have rights to that integration? [Ricky 07/16/2002] No. It just means that, in the future, we will add logic, probably through the addition of a PREREQ field, that lists the operations you must have in order to use that operation. When you assign an operation where you don't have the proper prerequisite operations, a dialog box would appear, listing the missing ones, and ask if you want to assign now or NOT assign the operation. For example, you can't edit a matter if you can't list it. If you try to assign the Edit Matter operation without first having the List Matters operation, you will be informed of this. That would be Interactive Validation, an option for security, that could be enabled – some folks might find this annoying. If you wanted to use Manual Validation (as opposed to Interactive), a Validate Now button appears, producing a report that lists all Security Roles with illogical operational assignments – orphaned operations, as it were. [TAF 07/17/2002]

6.1. Database changes: (PCR 10365)

1. SECDESCR.ADAPTERID column needs to be changed into SECDESCR.INTEGRATIONID
2. Add reference of column SECDESCR.INTEGRATIONID to INTENGINE_INTEGRATION.INTEGRATIONID.
3. SECURITY_DETAILS.ADAPTERID column needs to be changed into SECURITY_DETAILS.INTEGRATIONID.
4. Add reference of column SECURITY_DETAILS.INTEGRATIONID to INTENGINE_INTEGRATION.INTEGRATIONID.

5. Remove column SECDESCR.ADAPTERNAME because it's redundant field. Information about Integration name can be retrieved from INTENGINE_INTEGRATION.NAMESPACE, and/or INTENGINE_INTEGRATION.DESCRIPTION.

6.2. Changes in "Functional Security -> Assign Functions" screen. (PCR 10366)

6.2.1. Replace existing grids with Tree.

You can use DxTree as it's used in PCA.

Tree columns are 1) Application, 2) Description

6.2.2. Application

Data for this column has to be retrieved INTENGINE_INTEGRATION.NAMESPACE, Hint (if cursor is positioned on column) has to be picked from INTENGINE_INTEGRATION.DESCRIPTION.

6.2.3. Description

Data for this column has to be retrieved from SECDESCR.DESCRIPTION.

Tom, My suggestion would be to change it into "Functional Security Description"
07/11/2002 TAF: That is acce

6.2.4. Both columns should be quick searchable if possible.

6.2.5. Both columns should be sort able if possible.

6.2.6. First level of nodes have to be shown based on SECDESCR.INTEGRATIONID.

6.2.7. Second level of nodes should be shown based on SECDESCR.

6.3. Functionality in "Functional Security -> Assign Functions" screen. (PCR 10367)

6.3.1. Select '>'.

When Select button is clicked, selected function or functions have to be moved from 'Available Functions' tab into 'Selected Functions' tab.

6.3.1.1. Enabled when at least one function is selected in 'Available Functions' tab, otherwise disabled.

6.3.1.2. If there was no such Application in 'Selected Functions' tab, such application node has to be created as well.

6.3.1.3. If it was last available function moved to 'Selected Functions' tab, then Application should be removed as well from 'Available Functions' tab.

6.3.2. Select All '>>'.

When Select All button is clicked, all available functions should be moved to 'Selected Functions' tab.

6.3.2.1. Enabled when at least one function is selected in 'Available Functions' tab, otherwise disabled.

6.3.2.2. If there was no such Application in 'Selected Functions' tab, such application node has to be created as well.

6.3.2.3. If it was last available function moved to 'Selected Functions' tab, then Application(s) should be removed as well from 'Available Functions' tab.

6.3.3. Unselect '<'.

When Unselect button is clicked, selected function or functions have to be moved from 'Selected Functions' tab into 'Available Functions' tab.

> *Note: Exception to this rule* - *Security functions 'Administer Security Settings' and 'Administrator Access' cannot be removed from built in role "Administrator".*

6.3.3.1. Enabled when at least one function is selected in 'Selected Functions' tab, otherwise disabled.

6.3.3.2. If there was no such Application in 'Available Functions' tab, such application node has to be created as well.

6.3.3.3. If it was last selected function moved to 'Available Functions' tab, then Application should be removed as well from 'Selected Functions' tab.

6.3.4. Unselect All '<<'.

When Unselect All button is clicked, all selected functions should be moved to 'Available Functions' tab.

> *Note: Exception to this rule* - *Security functions 'Administer Security Settings' and 'Administrator Access' cannot be removed from built in role "Administrator".*

6.3.4.1. Enabled when at least one function is selected in 'Selected Functions' tab, otherwise disabled.

6.3.4.2. If there was no such Application in 'Available Functions' tab, such application node has to be created as well.

6.3.4.3. If it was last available function moved to 'Available Functions' tab, then Application(s) should be removed as well from 'Selected Function' tab.

6.3.5. Drag’n’Drop

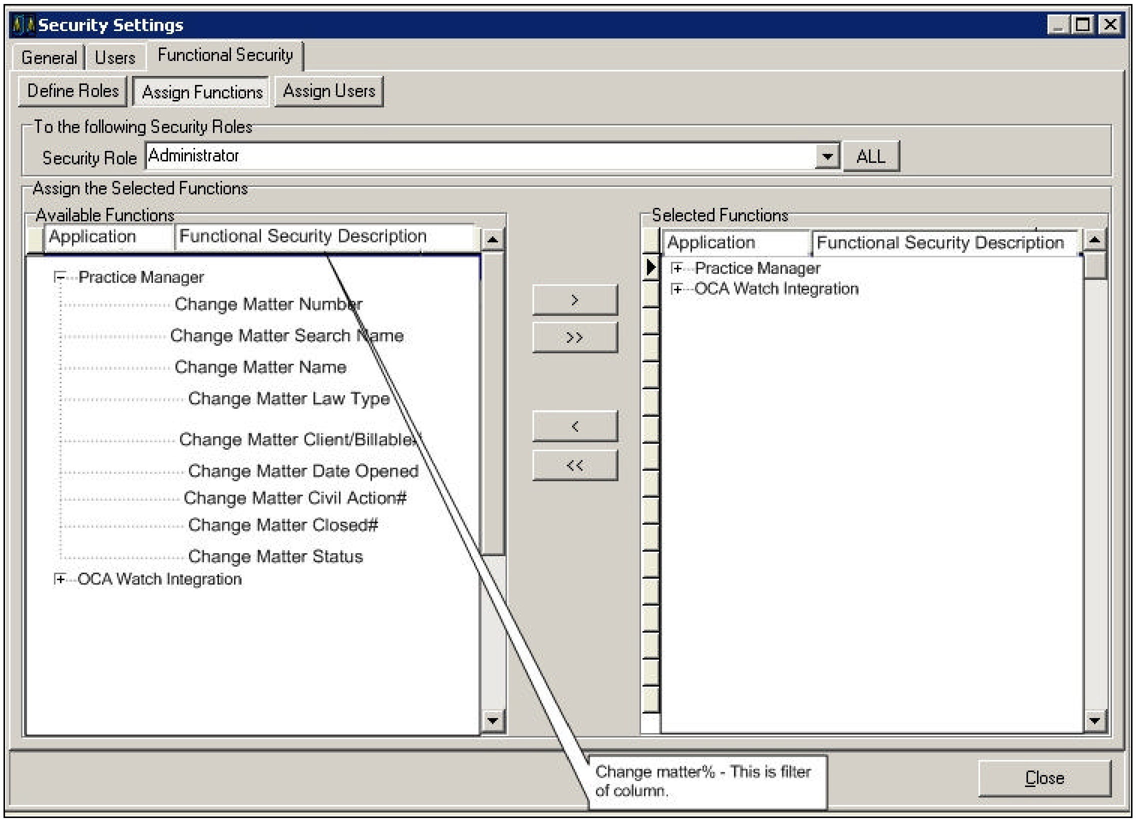
The UI should support drag’n’drop between tree panels, just as if using the Select and Unselect Features.

6.3.6. Multi-select

The UI should support multi-select of operations in contiguous and non-contiguous blocks.

6.3.7. Every operation requires update of database.

6.4. Functional Security – Assign Functions Mockup



7. GMT/UTC Preparation Requirements

This will add new fields to Practice Manager that will be used in future releases of Practice Manager for conversion to UTC/GMT date format, as well as provide an interim method by which the Portal Presentation can translate dates from Local Server Time to Local Client Time.

7.1. GMT/UTC System Settings (PCR 10368)

These values are for information only, and do not actually write values to the database.

1. Add new field (read-only) to System Settings to display the timezone of the database server (this should be read from the system).

2. Add a new field (read-only checkbox) to indicate whether the server time is automatically adjusted for daylight savings time.

7.2. GMT/UTC Site Settings (PCR 10369)

On the Site D/E Form, add the following required fields:

1. Timezone of the site – this list should be the same as that in Microsoft Window (I believe this can be read from the O/S).

2. Automatically Adjust for Daylight Savings Time – Checkbox, which indicates whether or not the time at the site respects daylight savings time.

8. Portal Requirements for Pumasillo.

8.1. Data Structure to Allow Timeslips to be Related to Multiple Matters (PCR 9785)

Add TIMMATAS table, which allows timeslips to be related to more than one matter (required for Portal). The UI functionality in PM will be added in a future release, if needed. For now, this is only required to allow a timeslip for a matter to be related to and placed in a portal matter.

8.2. Data Structure to Allow Workflow Items to be Related to Multiple Matters (PCR 9786)

Add MRULMATAS table, which allows workflow items to be related to more than one matter (required for Portal). The UI functionality in PM will be added in a future release, if needed. For now, this is only required to allow a workflow item for a matter to be related to and placed in a portal matter.

8.3. Data Structure to Allow Groupware Items to be Related to Multiple Matters (PCR 9787)

Add RULMATAS table, which allows groupware items to be related to more than one matter (required for Portal). The UI functionality in PM will be added in a future release, if needed. For now, this is only required to allow a groupware item for a matter to be related to and placed in a portal matter.

8.4. Update Related Tree in Matter to respect TIMMATAS, MRULMATAS and RULMATAS (PCR 9788)

We need to make sure we do not take out any existing functionality on how these records show right now in the related tree [Ricky 07/16/2002]

8.5. Implement new List Identifier Methodology so support saving of grid layouts (PCR 9789)

8.6. Remove previously hard-coded Publish Options

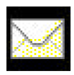
1. Remove Publish from the right-click menus added in 6990, 6992, 6995, 7000, 7003, 7006, and 7009. This will now be handled by the Portal Integration. (PCR 9790)
2. Remove the Publish button from the toolbar added in 7013. This will now be handled by the Portal Integration when that functionality. (PCR 9791)
3. Remove the Enable Portal Publishing option from System Settings that was added in 6990, 6992, 6995, 7000, 7003, 7006, 7009 and 7013. This will now be handled by the Portal Integration as an adapter and installed module. No field will appear on the System Settings DE Form. (PCR 9792)

9. PCA 3.0 Requirements for SP1

9.1. Changes to Core Practice Manager

The source information for these changes comes from the PCA 3.0 FDS version 6.

9.1.1. Implementing PCA Matter screen as a standard Matter in Practice Manager. (PCR 10372)



RE PM A5 SP1 and PCA Matter Info scre (this attachment updated 07/23/2002 by TAF from Steve's 07/17/2002 e-mail)

It is important that we make this technology useable for future integrations. Right now if the PCA module is installed then a new tab appears in all matter info screens for nesting budgeting information correct [Ricky 07/16/2002]

Ok, some clairification on how we will approach this:

Beta 1 Cycle

The Budget portion of the PCA_MatterInfo.ocx has been stripped out so that we can make it available for all matter screens. For the Beta 1 cycle, budgets will be accessible for any matter via the shortcut menu item described in 8.1.4.1 of this FDS. The budgets will NOT be nested in the matter info screens until Beta 2 cycle.

The Graphical Views tab in the PCA_MatterInfo.ocx, which requires the BL_BUDGET table for filtering, will remain in the PCA_MatterInfo.ocx. If the client does not have PCA installed, this tab will be hidden.

Beta 2 Cycle

The Graphical Views tab will be stripped from the PCA_MatterInfo.ocx. The charts will be recreated in the Report Viewer, including enhancements and new graphs.

The Budget component will be modified to be called Budget and Analysis, and the graphical views will be incorporated into the budget component. Refer to forum topic:

http://216.183.122.113/forums/pca/topic.asp?TOPIC_ID=4

Discussion on how the report viewer renderer will be embedded in PCA form will continue.

At this point, both the budget and graphical analysis pieces will need to be nested within all matter screens, with Budget being the second tab, next to General, and Graphical Analysis being the last tab.

[Steve Heller 07/16/02]

9.1.1.1. Incorporate Matter Info OCX into core Practice Manager. Add another radio button into "Law Type" ->"Matter General Screens" that allows to select Matter Info screen, which has to be called "Claim Matter".

9.1.1.2. The intake screen also needs to be incorporated [Ricky 07/16/2002]

9.1.1.3. Incorporate all the data structure required for PCA Matter Info.

9.1.2. Implementing PCA Admin Setting Menu as a Standard Administration Menu Item in Practice Manager (PCR 10374)

9.1.2.1. Remove from System Settings->Modules "Enable RealLegal PCA" radio button.

9.1.2.2. Remove from Administration menu item called "PCA Admin Settings"

9.1.2.3. Add external menu item into Administration menu, called "PCA Admin Settings", which has to call PCA_Admin.OCX. Implement Screen with OLE container, which will host PCA_ADmin.OCX.

9.1.3. Additional Rate Types (PCR 10379)

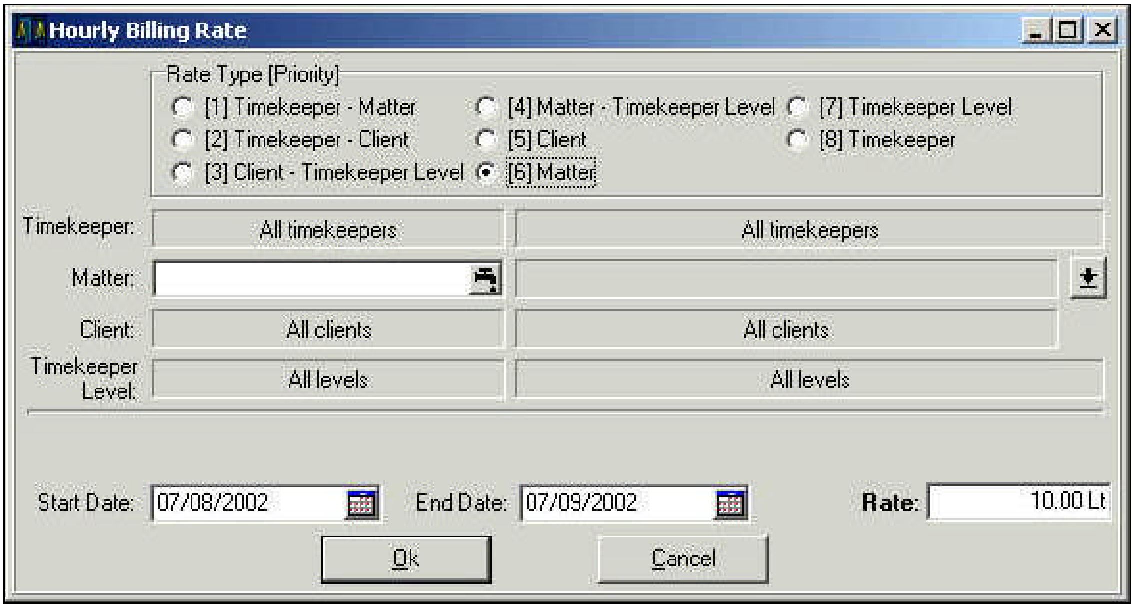
Law firms receive billing guidelines from their clients based on billing levels and/or transactions, not specific timekeepers. PM currently does not support rates based on billing levels. This functionality will be added to the Hourly Billing Rates in Timeslip Settings, requiring the addition of three rate types in PM:

- Client-Timekeeper Level
- Matter-Timekeeper Level
- Timekeeper Level

The functionality of these rate types is consistent with the existing rate type functionality.

- Client-Transaction
- Matter-Transaction
- Transaction

9.2. Rate Type Mockup – Timekeeper Level



General	Description
Title	Hourly Billing Rate
Usage	Establish billing rates
Open Focus	Rate Type option group
Tab Order	1. Rate Type [Priority] (tab by priority) 2. Timekeeper 3. Matter 4. Client 5. Timekeeper Level 6. Start Date 7. End Date 8. Rate 9. OK 10. Cancel

Visible Fields (label)	Definition	Properties	Default	UI Req	db Req	Help ID	Hot Key
Client – Timekeeper Level	Determines rate at the Client – Timekeeper Level priority	Option in Rate Type option group	N	N	N		
Matter – Timekeeper Level	Determines rate at the Matter– Timekeeper Level priority	Option in Rate Type option group	N	N	N		
Timekeeper Level	Determines rate at the Timekeeper Level priority	Option in Rate Type option group	N	N	N		

10. Reporting Requirements for Pumasillo

(PCR 10380)

15. Report Viewer Server Install expects SETTINGS, ENTITIES, and INTENGINE_INTEGRATION table update to be applied (already in SP1 pending directory).
16. Report Viewer Server Install expects RLENTERPRISE to be installed and PMWIN registered already.
17. Report Viewer Server Install expects INTENGINE 1.1 to be installed already (INTENGINE_INTEGRATION.SOURCE_ID).
18. Report Viewer expects "RealLegal.CAAPICORE.dll" to be installed already (client authentication module).
19. Report Viewer expects "RealLegal.DataService.Udl" to be installed already. [added by Lee 07/16/2002]

(PCR 10381)

20. Report Viewer Server Install registers the report viewer as a module for the given Practice Manager (used for authentication).
21. Report Viewer Web Reports uses authentication.
22. Report Viewer Client invokes a call on CAAPICORE regardless of whether its invoked from the web.

11. OCA Watch Requirements for Pumasillo

1. Practice Manager requires supporting multi select in Matter listing. This is required in order to allow user subscribe more than one matter to OCA Watch (this work was done in Salado – PCR 14892).
2. Practice Manager must be able to provide list of matters to the adapter call in external menu item. This is required because of 1 (this work was done in Salado – 10382 in OCAWatch for Testing).
3. Practice Manager must publish Refresh method for Global Matter listing. This will be required in order to show subscribed matters in OCA Watch (this is a "Nice-to-Have" – PCR 10383).

12. e-Mail Integration Requirements for Pumasillo

1. Split Create New Groupware Item into the following securities:
   a. Create New Groupware e-Mail – On upgrade, auto-assign to all roles that include Create New Groupware Item.
   b. Create New Groupware Appointment – On upgrade, auto-assign to all roles that include Create New Groupware Item.
   c. Create New Groupware Task – On upgrade, auto-assign to all roles that include Create New Groupware Item.
   d. Create New Groupware Fax – On upgrade, auto-assign to all roles that include Create New Groupware Item.
   e. Create New Groupware Note – On upgrade, auto-assign to all roles that include Create New Groupware Item.

2. To functional security, add the option of suppressing a functional security operation so that an integration can disable it from being available and automatically unassign it from all roles.
    a. When the Exchange or Lotus Notes Server-side integrations are installed, the only Groupware security that will be enabled is Create New Groupware e-Mail.

13. Lotus Notes Server and Client Integration Requirements for Pumasillo (PCR 14024)

1. Add a Publish Point to the Groupware Send Procedure.
2. Add a Publish Point to the Groupware Resend Procedure.
3. Add a Publish Point to the Note Send Procedure if not covered by the Groupware Send Procedure.
4. Change the e-Mail Client option section as follows:
    a. Replace the radio buttons with a look-up.
    b. Make the look-up read from a table that can be populated with values from integrations.
        i. When Outlook is selected, use the current integration code in PM.
        ii. When GroupWise is selected, use the current integration code in PM.
        iii. When Lotus Notes is selected, use the new Lotus Notes Client Integration, and suppress any behavior after the Send and Resend Publish Points have fired.
5. Add respecting of drag'n'drop from Lotus Notes 6.0 Client.

14. DocsOpen Security Requirements for Pumasillo

1. Add a Security button, with Publish Point, to the Document Profile (PCR 12003).

15. NTFS Security Requirements for Pumasillo

1. Add a Security button, with Publish Point, to the Document Profile (PCR 12003).

