

Andes.Chimborazo

Functional Requirements Specifications v1.1

Created on December 9, 2002
by Thomas A. Foley

Revision No. **8**

Last Saved on **December 17, 2002**
By Thomas A. Foley

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Change History

Version No.	Date	Name	Description of Changes
00	12/09/2002	Tom Foley	Composite Scope to Support the FDS
01	12/11/2002	Tom Foley	Added a note about FormsDesigner development (see page 6). Added Milestones (see page 7).

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1. Scope of Document

The purpose of this document is to outline the functional requirements of Andes.Chimborazo, the next major release of RealLegal Practice Manager.

This document will serve as the foundation for one or more Functional Design Specifications (FDS), as determined by the RealLegal, LLC Research and Development Group. The FDSs will be prepared separately from this FRS, and submitted for independent approval. If, in the preparation of the FDSs, it is determined there will be an impact on the contents of this FRS, it is understood that this FRS will be updated and resubmitted for acceptance.

It is understood that the business solution delivered in support of this FRS will follow standard RealLegal, LLC development practices, with respect to engineering, coding, testing, turnover, version control, documentation and release. Likewise, this solution will use the same standards with respect to distribution, implementation, training, and support.

2. Functional Description

2.1. Business Function

The purpose of this release to provide the following:

1. Incorporate selected client requests throughout all Practice Manager subsystems
2. Update login functionality to support a global authentication service that can be used by Practice Manager, as well as all supporting modules.
3. Expand functionality of the security system to allow non-core integrations and modules to publish new securities, which can be easily differentiated from core Practice Manager securities
4. Enhance the menu system to allow non-core integrations and modules to publish menu items to all menus, controlled by the publish securities and easily differentiated from core Practice Manager menu items
5. Add GMT/UTC support for firms that deploy Practice Manager in multiple timezones
6. Add support for non-core integrations and modules that are to be released in parallel with Practice Manager throughout 2003.
7. Enhance to PMRemote to support synchronization of matter information (add/edit), entity information (add/edit), documents (add/edit), notes (edit) and workflow (add/edit), as well as update timeslip synchronization (include edit).
8. Update functionality of drag'n'drop to populate Workflow instead of Groupware for tasks and appointments (option).
9. Update FormsDesigner to include new design elements and features, as well as allow for independent development from core Practice Manager.
10. Add Web rendering of FormsDesigner forms.

11. Synchronize Chimborazo with the Salado and Corazon code sets.

3. Proposed Solution

The following sections describe the basic feature set that has been selected for inclusion in this release of Practice Manager.

Features which were introduced in Salado and Corazon and are to be replicated in Chimborazo, are not included in this list. For more information on what features were introduced in those releases, refer to the respective release notes.

3.1. General

1. PCR 9165 – Simply changing of Desktop Views by adding a View Control toolbar at the top of the window.
2. PCR 11115 – Add Printing, Save to File, and Send options to the Details window. This will make this really useful for Application Support.
3. PCR 11324 – Revise Include Construction to be similar to Document Settings - Options - Paths. There should be 7 fields -- drop downs that also accept text (just like Prefix on Entity). The fields will be: Claim No., File No., Matter No., and Matter Name. When constructing the selection in RightFax (and the example), place a space between each selected value.
4. PCR 11627 – Add possibility to include Hot Docs Automator (necessary to generate and view Hot Docs Forms), Tiff and Image Viewer applications during install.
5. PCR 11868 – Open the template listing only if there are any templates for the object.
6. PCR TBD – Update buttons on Select Template window: (1) Change “Close” to “Skip” and (2) Order the buttons – left side = [New] / right side = [Delete] [Open] [Select] [Skip].

3.2. Matters

7. PCR 11484 – Add Site Type to the Matter Listing Filter, and pre-filter the global listing based on the site type of the active site (mockup req'd).
8. PCR 11829 – When opening any matter.record, keep the matter status bar and title bar visible.
9. PCR TBD -- Add new tab “General” tab to Matter Settings, and move all matter-specific system settings to that tab.

Note, this is because the number of system settings being added for PCRs in Chimborazo is causing us to run out of room on the System Settings form. This should not require much time to complete this work, as it is a UI-only change. In the future, we may look at making a data structure change so that settings are stored in a unique table for the object.

3.3. Entities

10. PCR 7738 – Add System Setting option to arrange order of tabs for entity preview so that the auxiliary information could be displayed first.
11. PCR 11343 – Add "Street Address" label below Description (Entity entry, Primary Address tab).
12. PCR 11485 – Add Site Type to the Entity Listing Filter, and pre-filter the global listing based on the site type of the active site (mockup req'd)

13. PCR 11830 – When a User is viewing an Entity record, using Preview record, and an Entity Auxiliary is assigned, allow the Auxiliary to be viewed first by default.
14. PCR 11908 – Update Entity Notes Listing: Change to grid with editable Preview. Allow designation of one note as primary, which is in focus by default. Convert existing Entity Notes to be related notes with IsDefault set to yes, which means we need to create a default note type during install/upgrade. This note is created when the entity is created.
15. PCR TBD -- Add new tab “General” tab to Entity Settings, and move all entity-specific system settings to that tab.

Note, this is because the number of system settings being added for PCRs in Chimborazo is causing us to run out of room on the System Settings form. This should not require much time to complete this work, as it is a UI-only change. In the future, we may look at making a data structure change so that settings are stored in a unique table for the object.

3.4. Documents

16. PCR 11135 – Move Assigned Caption, Assigned COS, and HD Answer folders to DOCCOMPS.
17. PCR 11207 – Add ability to create a new version of an existing document from the document listing.
18. PCR 11248 – Add a New button to the Document Versions listing.
19. PCR 11336 – Add Multi-select functionality to the Document Version listing.
20. PCR 11337 – Add Groupware button to Document Versions listing window. Functionality should be the same as Groupware menu item on the Document Listing.
21. PCR 11451 – Message should say "Choose Primary Matter first" instead of "Choose Matter first" (New Document Profile, if did not enter Primary Matter and clicked Author).
22. PCR 11486 – Add Site Type to the Document Listing Filter, and pre-filter the global listing based on the site type of the active site (mockup req'd)
23. PCR 11556 – When dragging and dropping an e-mail with attachments, give option to profile attachments and related to groupware item. Add Related Document tab to Groupware DE form.
24. PCR 12001 – When there is no physical access to document, do not allow to open Document Profile (New System Setting – NTFS Integration requirement).
25. PCR 11581 – Add a Change Set column to the component listing, to show what the last Change Set was that was applied.
26. PCR TBD -- Add new tab “General” tab to Document Settings, and move all document-specific system settings to that tab.

Note, this is because the number of system settings being added for PCRs in Chimborazo is causing us to run out of room on the System Settings form. This should not require much time to complete this work, as it is a UI-only change. In the future, we may look at making a data structure change so that settings are stored in a unique table for the object.

3.5. Notes

27. PCR 11487 – Add Site Type to the Note Listing Filter, and pre-filter the global listing based on the site type of the active site (mockup req'd).
28. PCR 11637 – Note listing-Filter screen has checkbox called Preview; it should be called Preview Item, as right -click menu option
29. PCR 12563 – When a User prints the note contents, he should have control over the following elements: (1) The ability to select specific notes, using CTRL + Click, or SHFT + Click; (2) the ability to include some or all of the following information in the Note: a) Primary Matter and Matter No., b) Date the Note was created c) the Type, or d) Author; and (3) when note contents or the note listing is printed, the User should be able to include a header including, at his option, the following information: a) Date--Although the system date can be used, User should be able to enter a date and override the system date, and b) Creator--system generated with ability to change.
30. PCR 12564 -- Notes should be enhanced as follows: (1) when a User is in a Note in a Matter, he should be able to tell what Matter he is in; (2) when the User is in a Note Listing, he should be able to view all matters, entities and issues to which the Note is assigned from the preview panel; and (3) users should be able to view Notes from a panel on the overview/general screen.
31. PCR TBD -- Add new tab "General" tab to Note Settings, and move all note-specific system settings to that tab.

Note, this is because the number of system settings being added for PCRs in Chimborazo is causing us to run out of room on the System Settings form. This should not require much time to complete this work, as it is a UI-only change. In the future, we may look at making a data structure change so that settings are stored in a unique table for the object.

3.6. Timeslips

32. PCR 11242 – Add Preference to clear Timeslip Description field when creating a new timeslip.

3.7. Groupware

33. PCR 11228 – Revise Subject Line Construction to be similar to Document Settings - Options - Paths. There should be 10 fields -- drop downs that also accept text (just like Prefix on Entity): Claim No., Description, File No., Matter Name, and Matter No.
34. PCR 11335 – Add "paperclip" column to indicate which groupware items have attachments, just like in Outlook.
35. PCR 11338 – Make sure the Groupware attachment functionality for document version attachments (see PCR 11337) is respected.
36. PCR 11488 – Add Site Type to the Groupware Listing Filter, and pre-filter the global listing based on the site type of the active site (mockup req'd).
37. PCR 11558 – Move the interim dialog to the Groupware DE form by adding Resend (replaces Edit) and Mark Completed (tasks and appointments only) buttons on the DE form itself. The View form is automatically opened when you open a groupware item

3.8. Workflow

38. PCR 11260 – Create option for child workflow items inheriting from parent workflow items.
39. PCR 11555 – Allow drag'n'drop of tasks and appointments to populate Workflow instead of Groupware (System Setting – include conversion utility).
40. PCR 11831 – Allow workflow activities to be marked as private.
41. PCR 12067 – When saving workflow item check if ticklers does not have same value in different tickler fields.
42. PCR 12153 – When starting workflow plan, add possibility to choose: Start Plan Now, or Start Plan Later. Start Later will create a “job” for starting the plan on a scheduled basis.
43. PCR 12325 – Add a system setting where the administrator can choose whether or not Responsible box is checked by default on the Assign Entities screen, when assigning Responsible to Workflow item.
44. PCR 12382 – Implement possibility to stop plan completion.
45. PCR TBD -- Add new tab “General” tab to Workflow Settings, and move all workflow-specific system settings to that tab.

Note, this is because the number of system settings being added for PCRs in Chimborazo is causing us to run out of room on the System Settings form. This should not require much time to complete this work, as it is a UI-only change. In the future, we may look at making a data structure change so that settings are stored in a unique table for the object.

3.9. Security and Login

46. PCR 11473 – Need a UI for viewing current users online and what products they are using. Use authentication API. Need ability for a user with Administrator role to kill another user's ticket.
47. PCR 11856 – Implement checking if workstation is properly configured for the current configuration of PM.
48. PCR 12354 – Add Timeslips checkbox into Security Settings General tab, under "Matter security applies to the following matter-specific items:"

3.10. PMRemote

49. Add the ability to upload new matters, and synchronize edits.
50. Add the ability to upload new entities, and synchronize edits.
51. Add the ability to create new documents, as well as edit existing ones (treat as new versions of existing).
52. Add the ability to upload new workflow items, and synchronize edits.
53. Add the ability to synchronize timeslip edits (need logic checking on export status on upload of edits).

3.11. FormsDesigner

FormsDesigner will first be delivered as v3.5, which is basically the extraction of the form rendering code from core Practice Manager code, so that FormsDesigner can be developed independently of Practice Manager. This release is scheduled to be included in the Alpha2 Cycle, and will be intended for internal testing purposes only.

54. PCR 11862 and 12724 -- Remove FormsDesigner rendering code from core Practice Manager code to allow for independent development of FormsDesigner.

FormsDesigner will then begin parallel development with Practice Manager, under the release number of v4.x. Due to the scope of many of the new features slated for FormsDesigner v4.x, it is anticipated there will be multiple releases, beginning with v4.0 to accompany Chimborazo. As new features are added, additional releases of FormsDesigner will be necessary. Those timelines will be addressed in a FormsDesigner-specific FRS currently being developed by Richard Greenspan.

55. PCR TBD – Add the ability to render a FormsDesigner form as a Web form for data entry. This primarily applies to forms designated as Matter Intake or Matter Info.

56. PCR 8139 – Add the ability to assign FormsDesigner auxiliaries by Site.

57. PCR 11259 -- Add the ability to trigger a visibility property when a user enters data in another field. This includes the following five conditions: I have outlined 5 conditions for this: (1) a field is disabled until a requisite field is not populated; (2) a field is disabled until a specific option is selected from an option group. If that option is not selected, the field remains disabled; (3) a field is disabled depending on the state of a checkbox field (checking a box my disable or enable fields); (4) a field is enabled/disabled based on whether the value is negative, positive or zero in the prerequisite number field; and, (5) a field is enabled/disabled based on whether the value is in the past, present, or future in the prerequisite date or datetime field.

58. PCR 11550 – Add existing 1 to 1 fields from PM as a look-up to include on forms (edit/view).

59. PCR 11551 – Add the ability to create 1-to-many relationships (grid) in a form.

60. PCR 11552 – Add the ability to create calculated field.

61. PCR 11553 – Add the ability to use first or use last in a list field.

62. PCR 11827 – Add a control, or option to the Entity lookup controls, that would display the full Entity listing that is displayed currently using cowboy lookup icon.

63. PCR 11828 – Update Lookup Components to 1. Display Code and EntityName. 2. Choose default sort.

64. PCR 11874 – Allow a FormsDesigner Form to be used as the matter intake form.

4. Project Milestones (core Practice Manager only)

The following identifies high-level milestones for the release of this project:

4.1. Project Preparation

1. December 31, 2002 : Need decision on whether Chimborazo is v8.8 or v9.0.
2. January 03, 2003 : Scope fully defined for Chimborazo (FRSs 100% complete)

Any additions or modifications to the scope after this date will dramatically impact all release dates.
3. January 03, 2003 : Functional Design Specifications 100% Complete

4.2. Alpha Milestones

1. August 15, 2002 : Released as Alpha1 for LawNet Conference (development stopped)
2. December 02, 2002 : Alpha2 Development Commenced
3. January 15, 2003 : Alpha2 Full Regression QA Testing Begins, Alpha 3 Development Begins
4. February 14, 2003 : Alpha2 Full Regression QA Testing Ends
5. April 08, 2003 : Alpha Development Ends

4.3. Beta Milestones

1. April 09, 2003 : Beta QA Testing and Bug Fixing Begins
2. June 27, 2003 : Beta QA Testing and Bug Fixing Ends
3. June 30, 2003 : Chimborazo Released as Beta for Upgrades

4.4. General Availability Milestones

1. June 30, 2003 : Chimborazo Released as GA for New Installs
2. September 29, 2003 : Chimborazo Released as GA for Upgrades