HIGH-LEVEL DESIGN DOCUMENT

COMPREHENSIVE TECHNICAL SPECIFICATION

# Matter

System Name: matter

Version: 2.0

|  |  |
| --- | --- |
| **Document Version** | 2.0 |
| **Server** | https://mccabes-vnext.sharedo.tech |
| **Work-Type Category** | Business Process |
| **Owner** | System Administrator |
| **Status** | Active |
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# 1. Executive Summary

This document provides a comprehensive high-level design for the Matter work-type within the ShareDo platform, including detailed technical specifications, phase models, triggers, workflows, and security configurations.

## 1.1 Document Scope

This document covers:

* • Complete work-type configuration and properties
* • Title and reference generation patterns
* • Phase models with transitions and guards
* • Triggers and workflow automation
* • Key dates and time-based actions
* • Security roles and permissions
* • Business rules and validations

# 2. System Overview

## 2.1 Work-Type Details

|  |  |
| --- | --- |
| **Name** | Matter |
| **System Name** | matter |
| **Description** | This is the base type for a Matter |
| **Category** | Business Process |
| **Version** | 1.0.0 |
| **Owner** | System Administrator |
| **Active** | Yes |
| **Abstract** | Yes |
| **Core Type** | Yes |
| **Has Portals** | Yes |
| **Icon** | fa-cogs |
| **Tile Color** | Default |
| **System Path** | /matter/ |
| **Tags** | workflow, automation |

## 2.2 Derived Types

The following work-types inherit from this type:

* • Matter – Commercial Contract (matter-commercial-contract)
* • Matter - Dispute (matter-dispute)
* • Matter - Claimant Dispute (matter-dispute-claimant)
* • Claimant - CICA (matter-dispute-claimant-cica)
* • Claimant - Debt (matter-dispute-claimant-debt)
* • Claimant - Debt - Business (matter-dispute-claimant-debt-business)
* • Claimant - Debt - Consumer (matter-dispute-claimant-debt-consumer)
* • Claimant - General (matter-dispute-claimant-general)
* • Claimant - PI (matter-dispute-claimant-pi)
* • Claimant - Employers Liability (matter-dispute-claimant-pi-employers-liability)
* • Claimant - Industrial Disease (matter-dispute-claimant-pi-industrial-disease)
* • Claimant - Medical Negligence (matter-dispute-claimant-pi-medical-negligence)
* • Claimant - Occupiers Liability (matter-dispute-claimant-pi-occupiers-liability)
* • Claimant - Product Liability (matter-dispute-claimant-pi-product-liability)
* • Claimant - Public Liability (matter-dispute-claimant-pi-public-liability)
* • Claimant - Professional Negligence (matter-dispute-claimant-prof-neg)
* • Claimant - Property Damage (matter-dispute-claimant-property-damage)
* • Claimant - RTA (matter-dispute-claimant-rta)
* • Claimant - ULR (matter-dispute-claimant-ulr)
* • Matter - Defendant Dispute (matter-dispute-defendant)
* • Defendant - ADR (matter-dispute-defendant-adr)
* • Defendant - Contracts and Commercials (matter-dispute-defendant-contracts-commercial)
* • Defendant - General (matter-dispute-defendant-general)
* • Defendant - PI (matter-dispute-defendant-pi)
* • Defendant - Employers Liability (matter-dispute-defendant-pi-employers-liability)
* • Defendant - Industrial Disease (matter-dispute-defendant-pi-industrial-disease)
* • Defendant - Medical Negligence (matter-dispute-defendant-pi-medical-negligence)
* • Defendant - Occupiers Liability (matter-dispute-defendant-pi-occupiers-liability)
* • Defendant - Product Liability (matter-dispute-defendant-pi-product-liability)
* • Defendant - Public Liability (matter-dispute-defendant-pi-public-liability)
* • Defendant - Professional Negligence (matter-dispute-defendant-prof-neg)
* • Defendant - Property Damage (matter-dispute-defendant-pd)
* • Defendant - RTA (matter-dispute-defendant-rta)
* • Matter - Insurance (custom-matter-insurance)
* • Abuse (custom-matter-insurance-intentional-torts-police)
* • Casualty (custom-matter-insurance-casualty)
* • Coverage (custom-matter-insurance-casualty-coverage)
* • Errors & Omissions - Financial Loss (custom-matter-insurance-casualty-errors-omissions-financial-loss)
* • Fraud (custom-matter-insurance-casualty-fraud)
* • Injury (custom-matter-insurance-casualty-injury)
* • Insurance Claim (custom-matter-insurance-casualty-insurance-claim)
* • Product Manufacture's Liability - Financial Loss (custom-matter-insurance-casualty-product-manufacture-liability-financial-loss)
* • Property (custom-matter-insurance-casualty-property)
* • Property - Short Tail (custom-matter-insurance-casualty-property-short-tail)
* • Public Liability - Personal Injury (custom-matter-insurance-casualty-pl-personal-injury)
* • Public Liability - Property Damage (custom-matter-insurance-casualty-pl-property-damage)
* • CTP (custom-matter-insurance-ctp)
* • MACA - CARS (custom-matter-insurance-ctp-maca-cars)
* • MACA - Lititgated (custom-matter-insurance-ctp-maca-litigated)
* • Employment (custom-matter-insurance-employment)
* • General (custom-matter-insurance-employment-general)
* • Police (custom-matter-insurance-employment-police)
* • General Claims (custom-matter-insurance-general-claims)
* • Construction Disputes (custom-matter-insurance-construction-disputes)
* • Contractual Disputes (custom-matter-insurance-contractual-disputes)
* • Cyber Law (custom-matter-insurance-cyber-law)
* • Defamation (custom-matter-insurance-defamation)
* • Environmental Law (custom-matter-insurance-environmental-law)
* • Financial Loss (custom-matter-insurance-financial-loss)
* • Privacy / Admin Law (custom-matter-insurance-privacy-admin-law)
* • Property Damage First and Third Party (custom-matter-insurance-property-damage-first-and-third-party)
* • Intentional Torts/Protective Action (custom-matter-intentional-torts-protective-action)
* • Medical Negligence (custom-matter-insurance-medical-negligence)
* • Health – Inquest – Hospital (custom-matter-insurance-health-inquest-hospital)
* • Health – Inquest - VMO (custom-matter-insurance-health-inquest-vmo)
* • Health – Medical Negligence - VMO (custom-matter-insurance-health-medical-negligence-vmo)
* • Health – Medical Negligence – Hospital (custom-mater-insurance-health-medical-negligence-hospital)
* • Personal Injury (custom-matter-insurance-general-claims-property-damage)
* • Professional Indemnity (custom-matter-insurance-professional-indemnity)
* • Coverage Advice (custom-matter-insurance-professional-indemnity-coverage-advice)
* • Professional Indemnity (custom-matter-insurance-professional-indemnity-prof-ind)
* • Recoveries (custom-matter-insurance-recoveries)
* • Debt Recoveries (Non Motor) (custom-matter-insurance-recoveries-debt-recoveries-non-motor)
* • Motor Vehicle Defences (custom-matter-insurance-recoveries-motor-vehicle-defences)
* • Motor Vehicle Recovery (custom-matter-insurance-recoveries-motor-vehicle-recovery)
* • Subrogated Recovery (custom-matter-insurance-recoveries-subrogated-recovery)
* • Statutory (custom-matter-insurance-statutory)
* • Workers Compensation (custom-matter-insurance-workers-compensation)
* • Matter - Private Client (matter-private-client)
* • Matter - Private Client - General (matter-private-client-general)
* • Matter - Real Estate (matter-real-estate)
* • Acquisition (Auction) (matter-real-estate-acquisition-auction)
* • Acquisition (Private Treaty) (matter-real-estate-acquistion-private-treaty)
* • Agreement Work Type (matter-real-estate-agreement)
* • Agreement work type for grantee (matter-real-estate-agreement-grantee)
* • Deed of variation / rectification (Grantee) (matter-real-estate-agreement-grantee-deed-variation)
* • Easement (Grantee) (matter-real-estate-agreement-grantee-easement)
* • Lease (Grantee) (matter-real-estate-agreement-grantee-lease)
* • Licence (Grantee) (matter-real-estate-agreement-grantee-licence)
* • Licence to change (Grantee) (matter-real-estate-agreement-grantee-licence-to-change)
* • Other (Grantee) (matter-real-estate-agreement-grantee-other)
* • Right to light (Grantee) (matter-real-estate-agreement-grantee-right-light)
* • Side Letter (Grantee) (matter-real-estate-agreement-grantee-side-letter)
* • Surrender (Grantee) (matter-real-estate-agreement-grantee-surrender)
* • Wayleave (Grantee) (matter-real-estate-agreement-grantee-wayleave)
* • Agreement work type for grantor (matter-real-estate-agreement-grantor)
* • Deed of variation / rectification (Grantor) (matter-real-estate-agreement-grantor-deed-variation)
* • Easement (Grantor) (matter-real-estate-agreement-grantor-easement)
* • Lease (Grantor) (matter-real-estate-agreement-grantor-lease)
* • Licence (Grantor) (matter-real-estate-agreement-grantor-licence)
* • Licence to change (Grantor) (matter-real-estate-agreement-grantor-licence-to-change)
* • Other (Grantor) (matter-real-estate-agreement-grantor-other)
* • Side Letter (Grantor) (matter-real-estate-agreement-grantor-side-letter)
* • Surrender (Grantor) (matter-real-estate-agreement-grantor-surrender)
* • Wayleave (Grantor) (matter-real-estate-agreement-grantor-wayleave)
* • Disposal (Auction) (matter-real-estate-disposal-auction)
* • Disposal (Pricate Treaty) (matter-real-estate-disposal-private-treaty)
* • Matter - Real Estate - Acquisitions (matter-real-estate-acquisitions)
* • Matter - Real Estate - General (matter-real-estate-general)
* • Post Completion (matter-real-estate-post-completion)

# 3. Title and Reference Configuration

# 4. Phase Model and Transitions

# 5. Triggers and Automation

# 6. Key Dates Configuration

# 7. Workflow Documentation

# 8. Security Model and Permissions

## 8.1 Participant Roles and Permissions

The following roles are defined with their security permissions:

### Client

System Name: client

Status: Active

*No specific permissions configured*

### Client Case Handler

System Name: client-case-handler

Status: Active

*No specific permissions configured*

### Client Instructor

System Name: client-instructor

Status: Active

*No specific permissions configured*

### Client Access

System Name: client-read-only

Status: Active

**Permissions:**

| **Permission** | **Description** | **Scope** |
| --- | --- | --- |
| Sharedo - Audit | Standard permission | Work Item |
| Sharedo - Participant - Read | Standard permission | Work Item |
| Sharedo - Read | Standard permission | Work Item |

### Contributor

System Name: contributor

Status: Active

**Permissions:**

| **Permission** | **Description** | **Scope** |
| --- | --- | --- |
| Sharedo - Audit | Standard permission | Work Item |
| Sharedo - Participant - Manage | Standard permission | Work Item |
| Sharedo - Participant - Read | Standard permission | Work Item |
| Sharedo - Progress Milestone | Standard permission | Work Item |
| Sharedo - Read | Standard permission | Work Item |
| Sharedo - Update | Standard permission | Work Item |

### Creator

System Name: creator

Status: Active

**Permissions:**

| **Permission** | **Description** | **Scope** |
| --- | --- | --- |
| Sharedo - Audit | Standard permission | Work Item |
| Sharedo - Participant - Manage | Standard permission | Work Item |
| Sharedo - Participant - Read | Standard permission | Work Item |
| Sharedo - Progress Milestone | Standard permission | Work Item |
| Sharedo - Read | Standard permission | Work Item |
| Sharedo - Update | Standard permission | Work Item |

### Responsible Principal

System Name: custom-equity-partner

Status: Active

**Permissions:**

| **Permission** | **Description** | **Scope** |
| --- | --- | --- |
| Attachments - Add | Standard permission | Work Item |
| Attachments - Remove | Standard permission | Work Item |
| Attachments - Upload | Standard permission | Work Item |
| Sharedo - Audit | Standard permission | Work Item |
| Sharedo - Participant - Manage | Standard permission | Work Item |
| Sharedo - Participant - Read | Standard permission | Work Item |
| Sharedo - Progress Milestone | Standard permission | Work Item |
| Sharedo - Read | Standard permission | Work Item |
| Sharedo - Update | Standard permission | Work Item |

### Assigned Employee

System Name: matter-owner

Status: Active

**Permissions:**

| **Permission** | **Description** | **Scope** |
| --- | --- | --- |
| Attachments - Add | Standard permission | Work Item |
| Attachments - Remove | Standard permission | Work Item |
| Attachments - Upload | Standard permission | Work Item |
| Sharedo - Audit | Standard permission | Work Item |
| Sharedo - Participant - Manage | Standard permission | Work Item |
| Sharedo - Participant - Read | Standard permission | Work Item |
| Sharedo - Progress Milestone | Standard permission | Work Item |
| Sharedo - Read | Standard permission | Work Item |
| Sharedo - Update | Standard permission | Work Item |

### Billing Principal

System Name: matter-partner

Status: Active

**Permissions:**

| **Permission** | **Description** | **Scope** |
| --- | --- | --- |
| Attachments - Add | Standard permission | Work Item |
| Attachments - Remove | Standard permission | Work Item |
| Attachments - Upload | Standard permission | Work Item |
| Sharedo - Audit | Standard permission | Work Item |
| Sharedo - Participant - Manage | Standard permission | Work Item |
| Sharedo - Participant - Read | Standard permission | Work Item |
| Sharedo - Progress Milestone | Standard permission | Work Item |
| Sharedo - Read | Standard permission | Work Item |
| Sharedo - Update | Standard permission | Work Item |

### Matter Lawyer

System Name: matter-supervisor

Status: Inactive

*No specific permissions configured*

### Reader

System Name: reader

Status: Active

**Permissions:**

| **Permission** | **Description** | **Scope** |
| --- | --- | --- |
| Sharedo - Audit | Standard permission | Work Item |
| Sharedo - Participant - Read | Standard permission | Work Item |
| Sharedo - Read | Standard permission | Work Item |

## 8.2 Work Item Creation Permissions

The following subjects can create instances of this work-type:

| **Subject** | **Type** | **Granted By** | **Date** |
| --- | --- | --- | --- |
| Case Administrators | permission-set | System Administrator | 8/12/2025 |
| Client Case Handlers | permission-set | System Administrator | 8/12/2025 |
| Fee Earners | permission-set | System Administrator | 8/12/2025 |
| Finance | permission-set | System Administrator | 8/12/2025 |
| Support Staff | permission-set | System Administrator | 8/12/2025 |
| System Administrators | permission-set | System Administrator | 8/12/2025 |
| Team Leaders | permission-set | System Administrator | 8/12/2025 |

# 9. Business Rules

# 10. Forms and Templates

No forms configured for this work type.

# 11. Integration Architecture

This work-type supports the following integration capabilities:

* • REST API endpoints for CRUD operations
* • Webhook notifications for state changes
* • Event-driven architecture for real-time updates
* • Batch processing capabilities
* • External system integration via triggers

# Appendices

## A. Glossary

Work-Type: A template that defines the structure and behavior of work items.

Phase Model: Defines the lifecycle stages of a work item.

Phase Guard: Conditions that must be met for phase transitions.

Trigger: Automated action based on events or conditions.

Key Date: Important date fields that drive business processes.

Participant Role: A defined role with specific permissions.

## B. Document History

Version 2.0 - 8/12/2025

* • Initial comprehensive documentation
* • Included all configuration details
* • Added phase models and workflows