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 |
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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 - Insurance (custom-matter-insurance)
* • Matter - Private Client (matter-private-client)
* • Matter - Real Estate (matter-real-estate)

# 3. Title and Reference Configuration

## 3.1 Title Generator

Pattern: [{WorkType}]-[{Year}]-[{Sequence}]: {Title}

Description: Automatic title generation for Matter work items

Example: MATTER-2024-00001: Sample Work Item Title

**Title Fields:**

| **Field Name** | **Type** | **Source** | **Required** | **Format** |
| --- | --- | --- | --- | --- |
| WorkType | string | workType.code | Yes | N/A |
| Year | date | system.currentYear | Yes | YYYY |
| Sequence | number | system.sequence | Yes | 00000 |
| Title | string | user.input | Yes | N/A |

## 3.2 Reference Generator

Pattern: {Prefix}{Year}{Sequence}

Prefix: MAT

Sequence Type: YEARLY\_RESET

Starting Number: 1

Example: MAT202400001

# 4. Phase Model and Transitions

Model Name: Matter Lifecycle

Description: Standard phase model for Matter work items

## 4.1 Phases

| **Phase** | **Order** | **Type** | **Allowed Actions** | **SLA** |
| --- | --- | --- | --- | --- |
| Draft | 1 | Initial | edit, delete, submit | 24 hours |
| In Review | 2 | Intermediate | approve, reject, comment | 48 hours |
| In Progress | 3 | Intermediate | update, pause, complete | 5 days |
| Completed | 4 | Final | archive, export | N/A |
| Cancelled | 5 | Final | archive | N/A |

## 4.2 Phase Transitions

**Submit for Review**

From: draft → To: review

Guards:

* • Completeness Check: allRequiredFieldsCompleted

**Approve**

From: review → To: in\_progress

Guards:

* • Approval Check: hasApprovalPermission

Requires Approval: Yes

Approval Roles: Manager, Supervisor

**Complete**

From: in\_progress → To: completed

Guards:

* • Completion Validation: allTasksCompleted

# 5. Triggers and Automation

The following triggers are configured for this work-type:

| **Trigger Name** | **Type** | **Event** | **Action** | **Status** |
| --- | --- | --- | --- | --- |
| AutoAssignOnCreate | onCreate | WorkItemCreated | AssignToDefaultQueue | Enabled |
| NotificationOnPhaseChange | onPhaseChange | PhaseTransition | SendNotification | Enabled |
| EscalationOnSLABreach | scheduled | SLACheck | EscalateToManager | Enabled |
| ArchiveOnCompletion | onPhaseChange | PhaseTransition | ArchiveWorkItem | Enabled |

## 5.1 Triggered Workflows

The following workflows are automatically triggered:

* • NotificationWorkflow - Triggered by: PhaseTransition
* • EscalationWorkflow - Triggered by: SLACheck
* • ArchiveWorkflow - Triggered by: PhaseTransition

# 6. Key Dates Configuration

The following key dates are configured:

| **Date Name** | **Type** | **Format** | **Required** | **Editable** |
| --- | --- | --- | --- | --- |
| Due Date | date | YYYY-MM-DD | Yes | Yes |
| Start Date | datetime | YYYY-MM-DD HH:mm | No | Yes |
| Review Deadline | date | YYYY-MM-DD | No | No |
| Completion Date | datetime | YYYY-MM-DD HH:mm:ss | No | No |

## 6.1 Date-Triggered Actions

**Due Date:**

* • Triggers: DueDateReminder
* • Triggers: SLACalculation

**Start Date:**

* • Triggers: StartNotification

**Review Deadline:**

* • Triggers: ReviewReminder

**Completion Date:**

* • Triggers: CompletionMetrics
* • Triggers: PerformanceReport

# 7. Workflow Documentation

The following workflows are associated with this work-type:

### Approval Workflow

System Name: approvalWorkflow

Type: approval

Description: Handles approval routing and decision recording

Triggered By: PhaseTransition:review

**Workflow Steps:**

1. Identify Approvers (query)

Action: GetApproversForRole

2. Send Approval Request (notification)

Action: SendApprovalEmail

3. Wait for Decision (wait)

Action: WaitForApprovalDecision

4. Process Decision (branch)

Action: ProcessApprovalDecision

Error Handling: Retry 3 times then escalate

Retry Policy: Exponential backoff

### Notification Workflow

System Name: notificationWorkflow

Type: notification

Description: Sends notifications to relevant parties

**Workflow Steps:**

1. Determine Recipients (query)

Action: GetNotificationRecipients

2. Prepare Message (transform)

Action: PrepareNotificationContent

3. Send Notifications (action)

Action: SendMultiChannelNotification

### Escalation Workflow

System Name: escalationWorkflow

Type: escalation

Description: Escalates items based on SLA or other conditions

Triggered By: SLABreach

**Workflow Steps:**

1. Check Escalation Level (query)

Action: GetCurrentEscalationLevel

2. Identify Escalation Target (query)

Action: GetNextEscalationTarget

3. Reassign Work Item (action)

Action: ReassignToEscalationTarget

4. Send Escalation Notice (notification)

Action: SendEscalationNotification

Error Handling: Log and continue

# 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

The following business rules are configured:

| **Rule Name** | **Condition** | **Action** | **Priority** | **Status** |
| --- | --- | --- | --- | --- |
| Auto-assign Priority | dueDate < today + 3 days | setPriority("High") | 1 | Enabled |
| Require Manager Approval | estimatedValue > 10000 | addApprovalRequirement("Manager") | 2 | Enabled |
| Prevent Weekend Due Dates | dayOfWeek(dueDate) IN (0, 6) | adjustDueDate(nextBusinessDay) | 3 | Enabled |
| Mandatory Fields Check | phase == "draft" AND action == "submit" | validateMandatoryFields() | 4 | Enabled |

# 10. Forms and Templates

## 10.1 Forms

**Initial Request Form**

Description: Form for creating new work items

Fields: 4

**Approval Form**

Description: Form for approval decisions

Fields: 2

## 10.2 Document Templates

* • Work Item Summary (document)
* • Status Report (report)
* • Approval Request Email (email)
* • Completion Certificate (document)

# 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