HIGH-LEVEL DESIGN DOCUMENT

COMPREHENSIVE TECHNICAL SPECIFICATION

# Matter

System Name: matter

Version: 2.0

|  |  |
| --- | --- |
| **Document Version** | 2.0 |
| **Server** | https://atb-vnext.sharedo.tech |
| **Work-Type Category** | Business Process |
| **Owner** | System Administrator |
| **Status** | Active |
| **Created Date** | 8/13/2025, 12:16:55 PM |
| **Document ID** | HLD-matter-1755051415720 |

Classification: Internal

Confidentiality: Confidential

Generated by ShareDo VS Code Extension

8/13/2025

# Table of Contents

[Auto-generated table of contents]

# 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 - Knowmore Class Action (matter-dispute-claimant-knowmore-class-action)
* • 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)
* • TAC Matter (atb-tac)
* • 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)
* • General - Dispute Matter (matter-dispute-claimant-general)
* • Superannuation Claim (atb-matter-superannuation)
* • Matter - Private Client (matter-private-client)
* • Matter - Private Client - General (matter-private-client-general)

# 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*

### External 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 - Assign | 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 - Assign | 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 |

### Legal Assistant

System Name: matter-assistant

Status: Active

*No specific permissions configured*

### File Operator

System Name: matter-owner

Status: Active

**Permissions:**

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

System Name: matter-partner

Status: Active

*No specific permissions configured*

### Manager

System Name: matter-supervisor

Status: Active

*No specific permissions configured*

### Matter Team

System Name: matter-team

Status: Active

*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 | 8/13/2025 |
| Client Case Handlers | permission-set | System Administrator | 8/13/2025 |
| Fee Earners | permission-set | System Administrator | 8/13/2025 |
| Finance | permission-set | System Administrator | 8/13/2025 |
| Support Staff | permission-set | System Administrator | 8/13/2025 |
| System Administrators | permission-set | System Administrator | 8/13/2025 |
| Team Leaders | permission-set | System Administrator | 8/13/2025 |

# 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 - 8/13/2025

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