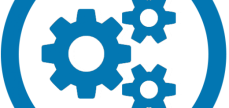
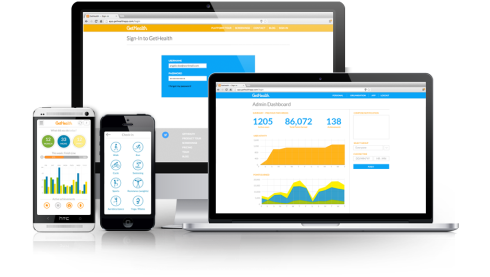
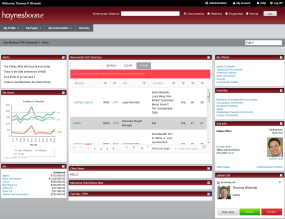
New Portal Development Plan

# Overview

The new framework of the portal will be built from the ground up using Microsoft C#.Net and MSSQL. Additionally, we will develop a SQL database that will handle widget security (access to see the widget) and information security within the widget itself (Associates see X but not drill down, Partners can see X and drill down, etc…)

Also, much of what will eventually be displayed exists in the current portal and will need to be re-written in C# because it uses outdated grid libraries or was written in Cold Fusion, PHP or another language that will not be supported going forward. The current thought is that we will begin re-writing the critical widgets first as these could potentially be used immediately even in the current portal.

Construction of the new portal will also entail the development of a data layer API that will serve not only the portal going forward, but allow us to develop mobile apps that will use this data layer API to serve up content regardless of the application (i.e. portal, iOS app, Android app, etc…):



We anticipate this rollout in several phases, but will design the new interface in parallel with the widget re-writes. Whereas the current portal focussed on a user going to an initial ‘My Page’ the new portal will focus on going to a user-relevant initial page with widgets and information relevant to the context of the user (i.e. Partner lawyers might see My Clients and collection information whereas an associate may see information relevant to an associate). This contextual information will depend on input from Theo Foster/Andy Ehmke and others throughout the process.

# Phase 1a: Security Framework (See Exhibit “A”)

Build out the security framework for the all application development. This security model will automatically gather the user’s group/committee memberships from: i) the HR systems; ii) the data warehouse; iii) Elite 3E; and iv) Active Directory. Information gathered will also be able to be manually overridden through an easily manageable system for granting rights to users through the portal.

# Phase 1b: Person Model (See Exhibit “B”)

Build out the people model for the all application development. This model will automatically aggregate a person’s model using: i) the HR systems; ii) the data warehouse; iii) Elite 3E; and iv) Active Directory.

# Phase 1c: Data Access Layer (i.e. API)

Design the new data access layer components and objects and move the site to utilize this methodology.

# Phase 2: Develop .Net gadgets from dbNetGrid apps (See Exhibit “C”)

Begin developing .Net versions of (Order of importance)

* Firm Directory
* A/R Click
* WIP Click
* Billing Directory
* Unbilled by Billing Attorney
* Telephone calls gadgets
* Other gadgets in PHP or Cold Fusion

# Phase 3a: Framework and Landing Pages Templates

Begin working on the layout of the framework and landing pages for the new portal from designs from Thom Wisinski/Theo Foster. Also begin developing the color scheme’s to be used. Also, begin working on the layout of departmental and practice area community pages.

# Phase 3b: Portal Community Documents/Net Documents

Begin working with the Net Documents API to convert relevant community documents currently stored in the portal “Directory” and/or iManage.

See: NetDocuments API - https://support.netdocuments.com/hc/en-us/articles/205219850-API-Documentation

# PHASE 4: Portal Rollout of version 1 of the new portal

Rollout of version 1 of the new portal. The old portal will remain up and running during this time so that if there is not equivalent functionality in the new portal it still is accessible in the old portal. Determination will then be made to convert missing functionality to the new portal.

# Phase 5: Convert and move HBNET site into the new portal

Move all the applications that are currently hosted on the HBNET site to the new portal languages and frameworks.

# PHASE 6: Mobile Development

Begin development to replicate the functionality found on the portal to handheld/device world.

# PHASE 7: Additional Development – Process Improvement

Build a timeline and project plan for new systems development opportunities. Start investigating where we can help the firm by automating processes or building new processes.

# Security Model (Exhibit “A”)

| **Level[[1]](#footnote-1)** | **See All** | **Drill Down** | **See Department** | **Drill Down** | **See Section Members** | **Drill Down** | **See all Non-Partners** | **See Self** | **Drill Down** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Developers | X | X |  |  |  |  |  |  |  |
| Board of Directors | X | X |  |  |  |  |  |  |  |
| Executive Accounting | X | X |  |  |  |  |  |  |  |
| Special Users – Certain Department Heads | X[[2]](#footnote-2) |  |  |  |  |  |  |  |  |
| Special Users – Office Admins | X[[3]](#footnote-3) |  |  |  |  |  |  |  |  |
| Special Users – Certain Office Admin Partners | X[[4]](#footnote-4) |  |  |  |  |  |  |  |  |
| Department Chair |  |  | X | X |  |  |  |  |  |
| Section Chair |  |  |  |  | X | X | X |  |  |
| Partners |  |  |  |  | X |  | X |  |  |
| Other attorneys |  |  |  |  |  |  |  | X | X |
| Other timekeepers |  |  |  |  |  |  |  | X |  |
|  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |  |

# People Model (Exhibit “B”)

1. Person Title (Mr., Dr., etc…)
2. First Name
3. Middle Name
4. Last Name
5. Middle Name
6. Employee ID#
7. User ID
8. Employee Title/Type
9. Location Code (i.e. 11-NYC, 01-DAL, etc…)
10. Internal Phone Ext \_ Office Location (Many)
11. Phone Number (Complete Number) \_ Office Location (Many)
12. Fax Number \_ Office Location (Many)
13. Home Number \_ Office Location (Many)
14. Cell/Mobile Number \_ Office Location (Many)
15. Section/Department
16. Practice Group
17. Practice Area
18. Is Billable
19. Billing Rate
20. Home Office Location \_ Floor \_ Local Room Address
21. Other Office Locations \_ Floor \_ Local Room Address (Many)
22. Is Remote
23. Last Remote Office \_ Floor \_ Local Room Address \_ Last Printer (Many)
24. Primary Printer
25. Is Notary
26. User ID
27. Hire Date
28. Birth Day (MM/DD)
29. Job Class
30. Status
31. Supervisor
32. Reports
33. Photo Location \_ SizeX \_ SizeY (Many)
34. Home Address
35. Current IP Address
36. Current Location Code
37. Current Location Description
38. Current Location Server
39. Current Location Updated
40. Current Network Connection
41. Current Network Type
42. Department
43. Work Email Address
44. Alt Email Address
45. Employee ID
46. Lexis ID
47. Westlaw ID

# Current Gadgets

| **Gadget ID** | **Users** | **Portlet Name (Yellow Highlight = Priority)** | **Carry Forward (Red = dbNet Grid)** | **Delete** | **System Gadget** | **Needs further review** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1158 | 1 | . K1 Approval . | X |  |  |  |  |
| 1250 | 1 | 2013 Travel Survey |  | X |  |  |  |
| 1164 | 4 | 3E Paperless Proforma |  | X |  |  |  |
| 1325 | 1 | 401(K) Test Web Service |  | X |  |  |  |
| 1175 | 1 | 401K Test | X |  |  |  |  |
| 1156 | 45 | A/R Click | X |  |  |  |  |
| 1336 | 20 | Advanced Client/Matter Search |  |  |  | X |  |
| 730 | 2 | Announcements Portlet - Content |  |  | X |  |  |
| 479 | 4 | Attorney Bio Info | X |  |  |  |  |
| 431 | 17 | Attorney Reports | X |  |  |  |  |
| 633 | 7 | Available Portlets |  | X |  |  |  |
| 1143 | 1 | Bankruptcy Filing | X |  |  |  |  |
| 1324 | 10 | Benefit Summary | X |  |  |  |  |
| 794 | 3 | Benefits | X |  |  |  |  |
| 586 | 51 | Billing Directory | X |  |  |  |  |
| 1258 | 3 | Bonus 401(K) Election | X |  |  |  |  |
| 806 | 4 | Bonus 401(k) Election (Associates) | X |  |  |  |  |
| 1354 | 1 | Box Test |  | X |  |  |  |
| 1429 | 6 | BRC Dashboard - Portlet | X |  |  |  |  |
| 953 | 1 | Bus Lit North Litigation Experience Browser |  |  |  | X |  |
| 1283 | 5 | Cash Desk |  |  |  | X |  |
| 532 | 1 | Citrix Host PC |  |  |  | X |  |
| 527 | 703 | Client / Matter Lookup | X |  |  |  |  |
| 879 | 1 | Client Info | X |  |  |  |  |
| 881 | 5 | Client Matters | X |  |  |  |  |
| 883 | 2 | Client Open Invoices | X |  |  |  |  |
| 983 | 2 | Client Portal Setup |  | X |  |  |  |
| 987 | 1 | Client Portal Setup Review |  | X |  |  |  |
| 771 | 1 | Community Involvement |  | X |  |  |  |
| 708 | 20 | Conflict Report Listing | X |  |  |  |  |
| 274 | 3 | Content Administration |  |  | X |  |  |
| 1213 | 1 | Current Clients | X |  |  |  |  |
| 1122 | 1 | Decisiv Matters |  | X |  |  |  |
| 798 | 10 | Discovery Partner |  | X |  |  |  |
| 799 | 1 | Discovery Partner Review Manager |  | X |  |  |  |
| 1294 | 8 | Distribution Reports | X |  |  |  |  |
| 763 | 48 | eBinder / eBrief Admin Portlet | X |  |  |  | Currently a studio gadget - will need to re-dev |
| 761 | 64 | eBinder / eBrief Links | X |  |  |  | Currently a studio gadget - will need to re-dev |
| 1110 | 6 | eBinder Search | X |  |  |  | Currently a studio gadget - will need to re-dev |
| 1427 | 2 | Elite Practice Group Codes |  | X |  |  | Old Elite gadgets from LexisNexis |
| 437 | 14 | Elite: Client Orig Attorney |  | X |  |  | Old Elite gadgets from LexisNexis |
| 435 | 12 | Elite: Frequent Clients |  | X |  |  | Old Elite gadgets from LexisNexis |
| 439 | 23 | Elite: Matters by Billing Attorney |  | X |  |  | Old Elite gadgets from LexisNexis |
| 440 | 14 | Elite: Matters by Orig Attorney |  | X |  |  | Old Elite gadgets from LexisNexis |
| 441 | 14 | Elite: Matters by Supervising Attorney |  | X |  |  | Old Elite gadgets from LexisNexis |
| 436 | 20 | Elite: Statistics by Practice Group |  | X |  |  | Old Elite gadgets from LexisNexis |
| 483 | 8 | Employee Information | X |  |  |  |  |
| 750 | 4 | Expense Check Direct Deposit |  | X |  |  |  |
| 1188 | 3 | Expense Checks 3E |  | X |  |  |  |
| 336 | 256 | FedEx Tracking |  | X |  |  |  |
| 482 | 174 | Firm Birthdays | X |  |  |  |  |
| 877 | 1 | Firm Demographics | X |  |  |  |  |
| 1104 | 22 | Firm Directory - NEW | X |  |  |  |  |
| 824 | 4 | Firm Groups |  | X |  |  |  |
| 684 | 35 | Firm New Hires | X |  |  |  |  |
| 425 | 45 | Firm News | X |  |  |  | Total Rebuild |
| 1269 | 1 | Firm Operational Issues |  | X |  |  |  |
| 424 | 78 | Firm Personnel Stats | X |  |  |  |  |
| 1268 | 17 | Firm Yearbook |  | X |  |  |  |
| 1165 | 4 | Food Service Providers |  | X |  |  |  |
| 426 | 370 | For Sale / Wanted | X |  |  |  |  |
| 873 | 54 | HayBoo Announcements |  | X |  |  |  |
| 826 | 3 | HayBoo Collab Announcements |  |  | X |  |  |
| 710 | 4 | HayBooCam |  | X |  |  |  |
| 389 | 7 | HBTV |  | X |  |  |  |
| 1265 | 1 | HIPAA Survey | X |  |  |  |  |
| 779 | 1 | HNB Polls Admin | X |  |  |  |  |
| 711 | 2 | ImageUploader | X |  |  |  |  |
| 675 | 3 | InterAction My Activities | X |  |  |  |  |
| 560 | 11 | InterAction My Alerts | X |  |  |  |  |
| 558 | 552 | InterAction My Contacts | X |  |  |  |  |
| 554 | 1147 | InterAction Search | X |  |  |  |  |
| 683 | 1 | Internet Traffic Report |  |  |  | X |  |
| 432 | 233 | Invoice Lookup | X |  |  |  |  |
| 421 | 6 | IT Administration |  | X |  |  |  |
| 422 | 4 | IT HelpDesk |  | X |  |  |  |
| 1270 | 1 | IT News |  | X |  |  |  |
| 698 | 1 | IT Suggestions Browser |  | X |  |  |  |
| 1288 | 7 | K1 | X |  |  |  |  |
| 800 | 9 | Laptop Reservation |  | X |  |  |  |
| 1235 | 1 | Lateral Hire Elections | X |  |  |  |  |
| 1231 | 6 | Lateral Hire Elections Admin | X |  |  |  |  |
| 1153 | 2 | Lateral Tracker | X |  |  |  |  |
| 715 | 1 | Lexis News |  | X |  |  | Old L/N gadgets from LexisNexis |
| 634 | 1 | LexisNexis Courtlink Alert: Attorney |  | X |  |  | Old L/N gadgets from LexisNexis |
| 643 | 1 | LexisNexis Courtlink Retrieve a Docket |  | X |  |  | Old L/N gadgets from LexisNexis |
| 713 | 6 | LexisNexis Get and Print |  | X |  |  | Old L/N gadgets from LexisNexis |
| 646 | 2 | LexisNexis(TM) Bankruptcy 2.1 |  | X |  |  | Old L/N gadgets from LexisNexis |
| 655 | 1 | LexisNexis(TM) Intellectual Property 2.1 |  | X |  |  | Old L/N gadgets from LexisNexis |
| 658 | 2 | LexisNexis(TM) My Premium Tracker 2.1 |  | X |  |  | Old L/N gadgets from LexisNexis |
| 661 | 1 | LexisNexis(TM) Research 2.1 |  | X |  |  | Old L/N gadgets from LexisNexis |
| 1115 | 1 | Litigation Hold |  | X |  |  |  |
| 1103 | 2 | Loislaw |  | X |  |  |  |
| 668 | 1 | Martindale-Hubbell(R) Lawyer Search by Firm 2.1 |  | X |  |  |  |
| 669 | 5 | Martindale-Hubbell(R) Lawyer Search by Lawyer 2.1 |  | X |  |  |  |
| 891 | 1 | Matter Open Invoices | X |  |  |  |  |
| 1081 | 1 | Matter Timekeeper Lookup - For Litigation Hold Emails |  | X |  |  |  |
| 670 | 2 | Matthew Bender Browse |  |  |  | X |  |
| 671 | 1 | Matthew Bender Search |  |  |  | X |  |
| 1446 | 1 | Mobile Form Test - Portlet |  | X |  |  |  |
| 276 | 5 | Most Recently Used Content |  |  | X |  |  |
| 391 | 65 | My A/R Click | X |  |  |  |  |
| 278 | 7 | My Activities | X |  |  |  |  |
| 589 | 30 | My BD Expenses | X |  |  |  |  |
| 481 | 3 | My ClientConnect |  | X |  |  |  |
| 475 | 337 | My Clients | X |  |  |  |  |
| 318 | 9 | My Collaboration Announcements |  |  | X |  |  |
| 319 | 393 | My Collaboration Calendar |  |  | X |  |  |
| 321 | 13 | My Collaboration Discussions |  |  | X |  |  |
| 322 | 15 | My Collaboration Documents |  |  | X |  |  |
| 324 | 211 | My Collaboration Projects |  |  | X |  |  |
| 326 | 18 | My Collaboration Tasks |  |  | X |  |  |
| 702 | 124 | My Conflicts | X |  |  |  |  |
| 562 | 117 | My Expense Checks | X |  |  |  |  |
| 757 | 15 | My iManage Documents | X |  |  |  | Convert to Net Documents |
| 430 | 1146 | My iManage Documents (old) |  | X |  |  |  |
| 1166 | 1 | My IP | X |  |  |  |  |
| 1441 | 1 | My Links\_Test |  | X |  |  |  |
| 1314 | 2 | My Location | X |  |  |  |  |
| 1216 | 15 | My Matters |  | X |  |  |  |
| 1207 | 2 | My Matters 3E | X |  |  |  |  |
| 1203 | 8 | My Password Status | X |  |  |  |  |
| 831 | 3 | My Proformas | X |  |  |  |  |
| 748 | 5 | My Shipments | X |  |  |  |  |
| 630 | 341 | My Telephone Calls | X |  |  |  |  |
| 1438 | 1 | My Telephone Calls (NEW TESTING) |  | X |  |  |  |
| 472 | 133 | My Timekeeper Stats |  | X |  |  |  |
| 478 | 355 | My Unpaid Invoices |  | X |  |  |  |
| 1331 | 2 | My Unpaid Invoices - Test Portlet |  | X |  |  |  |
| 402 | 285 | My Unposted Expenses |  | X |  |  |  |
| 1183 | 1 | New Client Test Portlet | X |  |  |  |  |
| 509 | 20 | New Clients |  | X |  |  |  |
| 1412 | 51 | New PayStub Viewer |  |  |  | X |  |
| 676 | 4 | News Feeds |  | X |  |  |  |
| 330 | 1 | News Test Portlet |  | X |  |  |  |
| 782 | 1 | NFL |  | X |  |  |  |
| 1089 | 12 | Paperless Proforma | X |  |  |  |  |
| 1289 | 4 | Partner Benefits | X |  |  |  |  |
| 860 | 58 | Partner Distribution Election | X |  |  |  |  |
| 1170 | 1 | Partner Distribution Test |  | X |  |  |  |
| 890 | 2 | Past Invoices | X |  |  |  |  |
| 1287 | 3 | Paycheck PC Viewer |  | X |  |  |  |
| 1291 | 293 | Paycheck Viewer | X |  |  |  |  |
| 1226 | 1 | Paycheck Viewer Dbg | X |  |  |  |  |
| 1400 | 9 | Pitches and Proposals portlet | X |  |  |  |  |
| 1142 | 2 | Project Auto Message |  | X |  |  |  |
| 971 | 1 | Project Eagle Stats |  | X |  |  |  |
| 1073 | 1 | Silent Auction | X |  |  |  |  |
| 1151 | 29 | Step into Fitness Tracker |  | X |  |  |  |
| 500 | 1 | Studio Administrator |  |  | X |  |  |
| 501 | 1 | Studio Database Manager |  |  | X |  |  |
| 578 | 2 | Target Client Info |  |  | X |  |  |
| 632 | 2 | Telephone Calls | X |  |  |  |  |
| 801 | 2 | Telephone Calls @@@ IT ONLY | X |  |  |  |  |
| 818 | 1 | Telephone Calls By City | X |  |  |  |  |
| 1129 | 3 | Telephone Calls For Conflicts | X |  |  |  |  |
| 1259 | 2 | Telephone Calls For Help Desk | X |  |  |  |  |
| 1090 | 2 | Telephone Calls for Receptionists | X |  |  |  |  |
| 1436 | 1 | Test BD TPW Portlet |  | X |  |  |  |
| 1074 | 1 | Ticket Request | X |  |  |  |  |
| 1349 | 1 | Timekeeper Stats Test |  | X |  |  |  |
| 954 | 2 | Total Search Portlet |  | X |  |  |  |
| 1237 | 5 | Trademark Estimates |  |  |  | X |  |
| 611 | 1 | Training Credits Portlet | X |  |  |  |  |
| 1337 | 1 | Training Links | X |  |  |  |  |
| 1132 | 5 | Unbilled by Billing Attorney | X |  |  |  |  |
| 1210 | 4 | Unpaid Invoices (Client) | X |  |  |  |  |
| 438 | 14 | Unposted Expenses Summary | X |  |  |  |  |
| 552 | 231 | UPS Tracking |  | X |  |  |  |
| 741 | 2 | USE NEW PORTLET INSTEAD Time Matters Docket Portlet - by Matter |  | X |  |  |  |
| 338 | 5 | User Info | X |  |  |  |  |
| 417 | 6 | Video Conference |  |  |  | X |  |
| 1116 | 2 | Video Conference Device Definations |  |  |  | X |  |
| 1121 | 44 | Voucher Lookup | X |  |  |  |  |
| 1190 | 1 | Voucher LookUp TEST |  | X |  |  |  |
| 1060 | 53 | W2 Approval | X |  |  |  |  |
| 914 | 20 | Weather |  | X |  |  |  |
| 1048 | 1 | WestKM Reports |  | X |  |  |  |
| 1083 | 4 | WestKM Search |  | X |  |  |  |
| 553 | 19 | Westlaw Find and Print (OBSOLETE) |  | X |  |  |  |
| 1157 | 17 | WIP Click | X |  |  |  |  |
| 277 | 5 | Workflow Tracker |  |  | X |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  | **Count** | **82** | **75** | **14** | **11** |  |

1. Each person’s security record will also indicate their level in the membership group. The values contained will be (In hierarchical order) 1 – Chair, 2 – Member, 3 – Outgoing member but still needs access, 4 – Random member. [↑](#footnote-ref-1)
2. Non-Partner timekeepers [↑](#footnote-ref-2)
3. Non-attorney timekeepers in their respective offices [↑](#footnote-ref-3)
4. All timekeepers in their respective office [↑](#footnote-ref-4)