Planning:

The Scenario:

My client is a lawyer. He works from home and must keep all of his records until he dies. Even after he dies his wife must keep all of the records. Then when she dies they must give it to a law firm to take care of them until they die. This is because of his type of practice, he is a real estate lawyer. He must keep the files in case a new buyer or seller wants to see the transactions as well as to keep track of the mortgages if the need arises. When somebody requests a file they give them a few simple things and they are expected to find and send them a copy of this file. Recently they started scanning in the files, but for some simple information they must still find the file and wait for it to load before finding the right page. Their current sorting system is not very effective as it it mostly on paper. They have all the files in filing cabinets sorted into years, and then in alphabetical order. However this takes many cabinets (around 20) and if not given the year it makes it nearly impossible to find. Their scanning organization is in a similar way. They have the client files in a file representing a year (that the file closed in) and then (using the computer's sorting) can be sorted in a few ways. They can be sorted by last name, size, or date modified. The date modified is not of any value for older files, as they are scanned in around the same time, however for newer files it can be.

Rationale for Proposed Solution:

A data base would improve the organizational methods of my client, and allow him to find files faster and easier. It would allow for him to find a file using some simple file characteristics, not just the name and year. Then he could view all the simple information associated with the file, but also get directions as to where the file is saved and stored.

Evidence of Consultation:

Spencer: What are some things you might be given and expected to find the file?

Gary Kinsella:Names of both parties, the buyer and the seller. The full date. An address would be helpful.

Spencer: Would marking whom you represented be helpful?

Gary Kinsella:Yes. I can represent a buyer, a seller, a bank, or a bank and a seller. If I represented a bank, it would be helpful to note the bank's name as well as the loan officer.

Spencer: Would you need to know the other lawyers name aswell?

Gary Kinsella:Yes, that would be helpful. Contact information of my client is also helpful.

Spencer: Such as a phone number and an email?

Gary Kinsella:Yes, that is good. The social Security number of both parties is also helpful.

Spencer: Okay. Would you like me to lead you to the file on the computer.

Gary Kinsella:Yes, that would be very helpful!

Spencer: Is there anything else you can think of that may be helpful?

Gary Kinsella:Not at this time, but if something comes up I will let you know.

Spencer: Okay. I will begin working on it and let you know when it is finished.

Success Criteria:

- Add files
- Search by multiple criterias
- View names, Socials, address, contact info, and date
- Distinguish who was represented.
    - If bank: Include banks name and loan officer

- View files

  - Both Searched and all

- Sort (Searched and all)

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