

# Lloyds PR Solicitors Diary System

Document	Lloyds PR solicitors diary system
Document version	1.0.1
Circulation	Lloyds PR solicitors, VinIT solutions & e Vision Micro system

	<b>Add a new user</b>
<b>Requirements</b> <p>This screen should have the following features:</p> <ol style="list-style-type: none"> <li>1. User name: This is a unique name that identifies the user. It is a unique name and it should not be duplicated with any other user. It should be the initials the firm uses to identify people e.g. JOD for James O'Donnell.</li> <li>2. Password: This must contain a minimum of 6 characters, both letters and numbers.</li> <li>3. Name: This must have the user's first and last name.</li> <li>4. Job title: For example, Barrister, Solicitor, Caseworker.</li> <li>5. Grade: A, B or C. There also needs to be the facility to change the grade of fee earner from a certain date. In addition, we need to know what date a fee earner changed their grade i.e. a chronology of the changes in grade. This must also be reflected in the diary. That is to say, if it is selected that Ben Manovitch is to become a grade A from a grade B fee earner on 01/01/10. Then anything entered in the diary before 01/01/10 should be clearly labeled as a grade B. Anything entered in the diary on or after 01/01/10 should be clearly labeled as a grade A.</li> <li>6. Administrator rights: The administrator must have the power to be able to reset the passwords for users e.g. if they lock themselves out after several login attempts or if they forget the password.</li> <li>7. Edit button: The user will be able to change the content except the unique user name.</li> </ol>	

Home	Create a Task	Settings
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Add user  
Add a new case  
Add a new task type  
time restriction

Add New user

Code	<input type="text" value="IW"/>	Also user name
Password	<input type="password" value="*****"/>	
Name	<input type="text" value="Iosie Wellend"/>	
Job Title	<input type="text" value="Barrister, solicitor and case worker"/>	
Location	<input type="text" value="Harlesden"/>	
Grade	<input type="text" value="A"/>	
Email	<input type="text" value="iosie@llovdsonr.com"/>	
Contact	<input type="text" value="078 XXXX XXXX"/>	
User type	<input type="text" value="Administrator/Standerd user"/>	

User current information should be able to print and any changes to the profile should be able to check in the report with the amendment time & date and how change those details

<input type="button" value="Reset Password"/>	<input type="button" value="Edit"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
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Page	Create a new case
<b>Requirements</b>  This screen should have the following features: <ol style="list-style-type: none"> <li>1. UFN: This is the unique file number that is generated for each separate case in LOLA. The system should prevent the user from entering the same UFN more than once. The UFNs are typically in the following format: 010110/001. This would be the first case on 1 January 2010.</li> <li>2. Offence: The type offence with which the client has been charged.</li> <li>3. Court: For example, Wood Green Crown Court or Highbury Corner Magistrates' Court.</li> <li>4. Client: The client's first and last name. The same client may be associated with separate cases. In addition, some cases may have more than one client associated with them.</li> <li>5. Case type: For example, MC, CC(LF1), CC (VHCC) or CC(CON)</li> </ol>	

Home	Create a Task	Settings
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Add user  
Add a new case  
Add a new task type  
Time restriction  
Add new case type

Add New case type

Current case type

Confiscation

New Case Type

VHCC

Should not allow to duplicate the case type

Case CODE

VHCC

Add new Case type

Remove case

Save

Cancel

Page	<b>Add a new task type</b>
<b>Requirements</b>  This screen should have the following features: <ol style="list-style-type: none"> <li>1. Current task types: All the current task types available: Preparation, drafting, conference with client etc.</li> <li>2. Current task codes. Each task type should have a simplified code for the calendar. For example, PREP, DRAFT, CON etc.</li> <li>3. New task type and code: The system must allow for the administrator to create a new task type and code. It should not allow for any duplication for task type or code.</li> <li>4. Remove task type and code: There should be the facility to remove a task type for the administrator. However, if a task has been recorded against a case, then it cannot be removed.</li> </ol>	

Home	Create a Task	Settings
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Add user  
Add a new case  
Add a new task type  
Time restriction  
Add new case type

**Add New task type**

**Current task type**

Preparation /Attendance at court /Attendance at a police station.....ect

**New Task**

Miscellaneous Attendance

**Task CODE**

MA

Shouldnt allow to duplicate the code

Add new task type

Remove Task

Save

Cancel

Page	Time restriction						
<p><b>Requirements</b></p> <p>This screen should have the following features:</p> <p>Maximum time recording per day: This is a key part of the system. There should be a restriction on the number of hours that fee earners can bill, e.g. 10 hours. We need the flexibility to alter number of hours that are billed per day. However, whatever the limit is, the system must not allow time recording beyond that limit on any given day.</p> <p>The main purpose of this diary system is to record tasks performed each day by fee earners for a particular cases so an accurate global record can be maintained.</p> <p>Example:</p> <p>User A time recording for 1 January 2010:</p> <table> <tr> <td>Case A Police station attendance</td> <td>5h</td> </tr> <tr> <td>Case B Preparation</td> <td>3h</td> </tr> <tr> <td>Case C Attendance at court</td> <td>1h</td> </tr> </table> <p>In above example, user A will have recorded 9h and so only has 1h left.</p> <p>A message should pop up if, for example, user A or another user attempts to add a 2 hour task to user A on 1 January 2010 stating that he only has 1 hour remaining for that day and therefore a 2 hour task cannot be added.</p>		Case A Police station attendance	5h	Case B Preparation	3h	Case C Attendance at court	1h
Case A Police station attendance	5h						
Case B Preparation	3h						
Case C Attendance at court	1h						



Home	Create a Task	Settings
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Add user

Add a new case

Add a new task type

Time restriction

Add new case type

### Time Restriction

Maximum Time recording per day

10 H

Warning after limit exceeded

customizable

Save

Cancel

Page	New case type
<p><b>Requirements</b></p> <p>This screen should have the following features:</p> <ol style="list-style-type: none"> <li>5. Current case types: All the current case types available: MC, CC(LF1), CC(VHCC) and CC(CON).</li> <li>6. New case type: The system must allow for the administrator to create a new case type. It should not allow for any duplication for case type.</li> <li>7. Remove case type: There should be the facility to remove a case type for the administrator. However, if a task has been recorded against a case type or if a client has been associated with a case type, then it cannot be removed.</li> </ol>	

Home	Create a Task	Settings
------	---------------	----------

Add user  
Add a new case  
Add a new task type  
Time restriction  
Add new case type

Add New case type

Current case type

Confiscation

New Case Type

VHCC

Should not allow to duplicate the case type

Case CODE

VHCC

Add new Case type

Remove case

Save

Cancel

Page	Create a task
<p><b>Requirements</b></p> <p>This screen should have the following features:</p> <ol style="list-style-type: none"> <li>1. Date and time: The user should select the date and the start/end time. The default should be today's date and time.</li> <li>2. Select case: There needs to be a search field to select the case for which this task has been carried out.</li> <li>3. Select the task: There should be a drop down box to choose the correct task.</li> <li>4. Task description: There should be a box to provide a more detailed description of the task.</li> <li>5. Select the fee earner: The person entering in the task into the system is not necessarily the person carrying it out.</li> <li>6. Time restriction: <ol style="list-style-type: none"> <li>a. The system should calculate how many hours are remaining for the fee earner who has carried out the task on that particular day. A message should pop up explaining that a task cannot be added if it exceeds the limit for the number of hours that a fee earner can work.</li> <li>b. The system should also restrict the user from creating a task where the hours would overlap with the hours for that fee earner for another task on the selected day. For example, James O'Donnell has a task for 1600-1700 and a user attempts to add a task for 1630 to 1800. This must not be allowed and a message should pop up explain why.</li> </ol> </li> </ol>	

Home	Create a Task	Settings
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Add user  
Add a new case  
Add a new task type  
Time restriction  
Add new case type

## Create a Task

Date

20/04/2014

Variable and can select different date

Task creator

Ben Manovitch

System should pick this from the user login

Task Completed by (Fee earner)

Natasha Patel

Must be a drop down of list of users in the system

Case

R V Kumarathas

case search fuction client name and then  
UFN number should POPs up according to that  
can select from drop down

Task type

Attendance at police station

Task Discription

Total number of Hours remaining

2h

Can't change or edit

Task Start time

13:00h

Variable can edit and change

Task End time

14:00h

Variable can edit and change

Total number of Hours

1h

cant change or edit

SAVE

EDIT

Page	Reports
<p><b>Requirements</b></p> <p>The following reports are required to be added to the system:</p> <ol style="list-style-type: none"> <li>1. Total number of hours recorded for a specific case. The report should have the following filters: <ol style="list-style-type: none"> <li>a. Start and end dates</li> <li>b. Users entering the tasks</li> <li>c. Fee earners carrying out the tasks</li> <li>d. Task types</li> </ol> </li> <li>2. Total number of hours recorded for a selection of cases. The report should have the following filters: <ol style="list-style-type: none"> <li>a. Any cases selected</li> <li>b. Start and end dates</li> <li>c. All cases a fee earner has worked on</li> <li>d. All cases a user has entered tasks on</li> </ol> </li> <li>3. Total number of hours recorded for a fee earner. The report should have the following filters: <ol style="list-style-type: none"> <li>a. 1 or more, or all, fee earners</li> <li>b. 1 or more, or all, cases</li> <li>c. 1 or more, or all, tasks</li> <li>d. Start and end dates</li> </ol> </li> <li>4. Total number of hours recorded by a user. The report should have the following filters: <ol style="list-style-type: none"> <li>a. 1 or more, or all, users</li> <li>b. 1 or more, or all, cases</li> <li>c. 1 or more, or all, tasks</li> <li>d. Start and end dates</li> </ol> </li> </ol> <p><b>Note: When displaying the report please don't display it in codes assigned</b></p>	

**Details report**

Client	R V Kumarathas
User	All user
Task	All task
From	19/04/2014
To	21/04/2014

Date	Task type	User	Time
16/04/2014	Preparation	Josie Welland	5h
17/04/2014	Conference with client and/or counsel	Ben Manovitch	3h
18/04/2014	Preparation	Josie Welland	4h
19/04/2014	Attendance at court	Ben Manovitch	7h
20/04/2014	Preparation	Josie Welland	2h
21/04/2014	Attendance at court	Ben Manovitch	6h

total Number of hours                      27h

Note

The following report can be filter by case wise  
User wiese  
Task wise  
And data range

In addition following report can be added to the sytem  
List of users  
List of cases  
individual person time recording

Page	<b>Calendar view (main window)</b>
<p><b>Requirements</b></p> <p>The calendar must run from Monday to Sunday. It should have the feature to view a day, a month or a year. It must automatically default to the current month.</p> <p>The user should be able to select a day and add a task by clicking the add button. This should lead to the task add page.</p> <p>The entry in the calendar should display the following information:</p> <ul style="list-style-type: none"> <li>Client's surname and first initial/case type/UFN/user adding task/fee earner carrying out the task/time/total hours (decimalised)/Task code</li> </ul> <p>This should appear as follows:</p> <ul style="list-style-type: none"> <li>Kumarathas(S)/CC(VHCC)/240612/001/BM/<b>HR/0900-1230/4.5H/PREP</b></li> </ul> <p>The tasks should be grouped together by fee earner and ordered in chronological order.</p>	



Home	Create a Task			Settings
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[Add user](#)  
[Add a new case](#)  
[Add a new task type](#)  
[time restriction](#)

View

Day/ Week /Month

Monday 14/04/2014	Tuesday 15/04/2014	Wednesday 16/04/20 1. S0897654 JW/SK/Pre/5h 2. KP /SK/Con/2h	Thursday 17/04/2014	Friday 18/04/2014	Saturday 19/04/2014	Sunday 20/04/2014
Monday 21/04/2014 1. BM/SK/ATC/7h	Tuesday 22/04/2014	Wednesday 23/04/2014 1. BM/SK/ATC/6h	Thursday 24/04/2014	Friday 25/04/2014	Saturday 26/04/2014	Sunday 27/04/2014
Monday 28/04/2014	Tuesday 25/04/2014					

## DAY VIEW

Home	Create a Task			Settings
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### Thursday 17/04/2014

1. S0897654/JW/SK/Pre/5H
2. 8797979709/KP /SK/Con/2H
- 3.98689690/BM/LN/PV/4H
- 4.89687675/NP/KH/PV/5H

Total Entries = 4  
 Total hours per day = 16 H

