AdvoSecure Functional design and requirement overview

# Common description

AdvoSecure is a SAAS platform for law firms and legal entities to handle full case management in Matter centric (Dossier/Case) workflow. In short this means that all workflows are controlled by the Dossier (Legal Case). AdvoSecure is not in production yet.

Comparative platforms are normally Client centric based systems taking a person entity as base for the business logic.

The idea is that from a Lawyers perspective all data and actions are managed from a Matter.

Every phone call, email, Court files, Court messages and party information are all traceable pieces connected to a Case.

Also Case status and Court status are easily visible from that Case.

Timesheet and cost declarations are automatically created and send to clients. Clients can login and follow their own case status, declaration (with payment options), disclosed documents etc..

Afbeelding met tekst, sneeuw, buiten, natuur

Automatisch gegenereerde beschrijvingAfbeelding met tekst, computer, schermafbeelding

Automatisch gegenereerde beschrijving

AdvoSecure is for all employees to do their daily business.

Document, library, email, calendar and other kind of work is also concentrated in one dashboard.

This results in an efficient and resource/investment friendly environment relieving clients from ICT management and cost issues.

# Feature overview

AdvoSecure features and future featureset include:

* Common
  + Multi tenant – with private database
  + Multi language en country settings
  + Multiple authentication options (internal, LDAP, Azure AD etc..)
  + flexible extendible widgets
  + overview of tasks, alerts, emails, phonecalls, sales leads
  + Chat function
  + Desk phone and Cellular phone integration and management
  + Receptionist dashboard for phone and chat management
  + Search (documents, cases, persons etc.)
  + Integrated DMS option with Encrypted upload and advanced property options.
  + Word templates and template automation
  + Integrated client portal for uploading documents, checking status, billing etc (future feature)
  + Public website with branding options (logo’s, content and templates) (future feature)
  + Custom fields and reports (future feature)
  + Support request (future feature)
  + Voice recognition
  + Auditing
* Matter management (Case / Dossier management)
  + Conflict rule checks (does Matter has no historic or ruleset conflicts?)
  + Matter / Case types and smart forms
    - Dispute (with legal intervention)
    - Dispute (solved without court)
    - Advise
    - Projects
    - Other
  + Matter notes and tracking (meetings, phonecalls, etc.)
  + Matter staging and management
  + Document management with encryption
    - Files
    - Documents
    - Archive
    - emails
  + Tasks with deadlines and auto time management and registration
  + Appointments (meetings, integrated with Office365)
  + Court administration
  + Email integration with Office365
  + Costs management
  + Legal cost compensation management (Toevoegingen nl)
  + Contact per type (Client, Paying party, Lawyer, Opponent parties etc)
  + Court Scroll management and status
  + Court message exchange (KEI)
* Document management
  + Classification (private, restricted, public)
  + Shifting classifications by date (e.g. to be findable and public by data)
* Contact management with GDPR filters for restricted personal information)
  + Persons with advanced private data properties
  + Companies
  + Employees
* Sales management
  + Leads
  + Opportunities
* Accounting
  + Time management
  + Billing
  + Reporting
  + Thirdparty accounting (Derdengelden rekening beheer)

# Usage model

Most SAAS solutions offer a user based subscription in where there is no difference in partners or other users of a firm.

In AdvoSecure things are different. Not the user is billed but only its usage will be billed.

The whole platform is available. Only some specific integrations will be enabled on request like phone integration or specific connections.

Billing will be done against the number of open cases in a month.

The idea is that AdvoSecure will be free for unlimited users up to e.g. 10 open/active cases per firm.

# Project status and planning

AdvoSecure is still in development and a non finished platform with original plan to go live in 2020. Due to shifting priorities and resource issues the project was hold in a non market ready version.

Non finished functionality for example:

* Need form and template clean-ups
* Case management 90% done
* Court integration to be done
* Phone integration partially done (60%)
* Authentication / role management requires restructuring
* Unit and user testing needs to take place
* Import, export functionality to be done
* Office365 with Graph Api is partly integrated

A proof of concept demo is running at demo.advosecure.nl. Multiple legal firms had a look at it and gave input to fit the platform as best it can be to the legal market.

Current plan is to release a working version asap, but advancing frameworks require conversion from classing ASP.net to ASP.net Core. Plan is to have a test ready version in autumn and a market ready version by end of year.

# Current Platform Architecture

AdvoSecure is build as a multi tiered Web application (Visual studio project).

* IIS hostable
* Asp.Net Classic (4.8) with MVC 5, Angular
* Entity Framework (disputable)
* Javascript
* GraphApi
* SignalR event handling (phone events)
* PostgreSQL (chosen for both speed and license cost)
* Microsoft Devops/Git repos
* DTAP
  + Development
  + Test / Acceptation / Demo

# Platform Architecture redesign and renewal

* .Net Core 6 API api based multi tiered architecture
* Angular as frontend
* PostgreSQL databases
* Hybrid by choice, on-prem or azure
* Autorization OpenID integrated (Local DB, Ldap, on-prem AD, Azure AD, Google etc)
* Multi Tenant
  + Single Tenant management subscription database
  + Workload database per tenant
* ASP.NET Core 6+ API
* React or Angular frontend
* By choice move to cloud (Azure, Docker, AKS etc)
* **Multiple identity and auth integrations: Auth-framework OpenID**
  + Internal users
  + LDAP
  + Azure AD
  + 3rd party (Google, Facebook, other)
* Docker support
* Encrypted document storage for Matter attachments
* **Hybrid multitenancy with single instance webservices/application server and 1 Central tenant management DB and 1 working DB per Tenant**
* Optimal GraphAPI integration Microsoft365 and Azure
  + Accounting
  + Calendar
  + Email
  + Tasks / ToDo
  + Word invocation and template integration
  + Teams
  + Onedrive / Sharepoint (optional)
* SignalR integration (phone, chat, alerting etc)
* Webhooks
* Import / Export of reports and data > XML, CSV, PDF, DOC, XLS etc
* EDI messaging with multiple parties
* Integrated VOIP/SIP client (future feature)
* CI/CD ready for on premise (IIS, Linux hostable .net core) deployments or Azure
* DTAP deployment environments
  + Development per developer via Jumpbox PC’s (win 10 + visual studio and local postgreSQL
  + Smoketest environment local DC
  + Test/Acceptance local DC
  + Demo Azure
  + Prod local or Azure
  + Prod AKS (future)

# Plan

Idea is to not convert the old classic platform but create a virgin base and tranfer and convert code by module and form to the new project. This ensures a stable clean environment not dependant on legacy or obsolete modules and core.

1. Create new devops GIT and project
2. New infra and components architecture
3. Create Dev, test, demo/acceptance and prod environments
   1. Webservice, database, dockers, network, security
4. Create new layered base project (ASP.Net Core 6 MVC) with basics (authentication and roles) and base template.Including multi tenant management
5. Convert classic ASP.Net code to new project

# Screenshots

## Matter / Dossier structure

Afbeelding met tekst

Automatisch gegenereerde beschrijving

Afbeelding met tekst, schermafbeelding, binnen

Automatisch gegenereerde beschrijving

## Contact and Employee forms

Afbeelding met tekst

Automatisch gegenereerde beschrijving

Afbeelding met tekst

Automatisch gegenereerde beschrijving

Settings and lookup tables:

