

Onit Matter Taxonomy

For most implementations, all matters will have a three-tiered matter taxonomy field set:

- **area_of_law**
 - **matter_type**
 - **matter_subtype1**

All of the fields above will be dropdowns. The available **matter_type** dropdown options will be dependent on the selected **area_of_law**; the available **matter_subtype1** dropdown options will be dependent upon the selected **matter_type**.

Below are some screenshots that show the matter taxonomy approach described above.

The **matter_type** dropdown:

Matter

Summary

Matter Manager *

Ont MM New Admin

Matter Name *

test matter

Matter Opened On

8/2/2018

Brief Matter Description

Area Of Law *

Corporate

Matter Type *

Corporate Governance

Finance

Merger & Acquisitions

Legal Entity *

Country *

State *

Matter Currency *

United States Dollar

☐ Significant Matter

☐ Private Matter

Submit Matter

The **matter_subtype1** dropdown:

Matter



Summary

Matter Manager *	Ont MM New Admin
Matter Name *	test matter
Matter Opened On	8/2/2018
Brief Matter Description	
Area Of Law *	Disputes
Matter Type *	Intellectual Property
Matter Sub Type *	
Legal Entity *	Patent
Country *	Trademark
State *	Arizona
Matter Currency *	United States Dollar
<input type="checkbox"/> Significant Matter	
<input type="checkbox"/> Private Matter	

Submit Matter

Problems to Solve

When implementing this matter taxonomy, there are a number of competing problems that must be solved:


- **Customizing Dropdown Options:** At the most basic level, you'll want to populate the taxonomy dropdown options based on the client's specific legal operations requirements. In other words, you'll want to customize the dropdown values that are available in the **area_of_law**, **matter_type**, and **matter_subtype1** dropdowns.
- **Filtering Dropdown Options:** Filter the available **matter_type** and **matter_subtype1** dropdown options based on the value that the user selected one level up in the taxonomy chain. For example, only show **matter_type** dropdown options that correspond to the selected **area_of_law**.
- **Preventing Blank Dropdowns:** Never show a blank dropdown. For example, only show the **matter_subtype1** field if the selected **matter_type** contains subtypes (many do not).
- **Hiding/Showing Non-Taxonomy Fields:** Once a user selects a full taxonomy set (e.g., an **area_of_law**, **matter_type**, and **matter_sub_type**), immediately show *other* fields that map to that taxonomy. For example, if a user selects **Disputes** (**area_of_law**), **Intellectual Property** (**matter_type**), and **Patent** (**matter_sub_type**), immediately show additional fields that map to this taxonomy (e.g., a **patent_number** field in this example).

To solve these problems, use the out-of-the-box plumbing already in the environment. This plumbing uses the following Onit objects:

- Fields:
 - **area_of_law:** The area of law (e.g., Intellectual Property).
 - **matter_type:** The matter type (e.g., Patent).
 - **matter_subtype1:** The matter subtype, if applicable (e.g., Infringement).
 - **hide_matter_sub_type:** A `TRUE` or `FALSE` string used to hide the matter subtype dropdown when there is no matter subtype.

- **area_of_law_matter_type_merged**: Value of **area_of_law** and **matter_type** concatenated. Used for hiding and showing additional Fields dependent on the selected matter taxonomy. This concatenation field is a workaround to a Listcombo's limitation of only being able to filter based on the value of a *single* other field – as a result, you must create a hidden field that contains a concatenation of two other fields.
- **UI Action**: A UI Action named **Update Tags Using List Lookup** extracts values from the matter taxonomy list. This UI Action displays and hides Fields depending on the selected matter taxonomy, as well as populates the values of the **hide_matter_sub_type** and **area_of_law_matter_type_merged** fields. This action fires immediately after a user selects a new value from any of the matter taxonomy fields.
- **List**: An Excel spreadsheet **named Mattertypes** that has been uploaded to Onit. This list is used to orchestrate much of the overall solution, as it contains the dropdown options, tags, and mapping logic. While the base Onit ELM product comes with this list by default (available on the **/admin** page), you will want to heavily edit it around your needs.

The following sections of this document will explain how the Onit objects above solve each of the matter taxonomy problems mentioned earlier. You can use this information to both understand the out-of-the-box configuration and to customize it around your needs.

 **Note:** To master this solution, it's important that you are familiar with the content covered in the following Onit tutorials: [Using a UI Action to Update Fields](#), [Formatting, Importing and Updating a List](#), and [Using Tags to Hide/Show Fields](#).

Problem: Customizing Dropdown Options

Customizing the **matter** and **matter_subtype1** dropdowns in your **Matter** App is straightforward. Upload a new list with your new information each time that you would like to update the taxonomy.

The Excel spreadsheet containing your matter taxonomy must be formatted as seen below:

	A	B	C	D	E	F	G	H
1	fieldLabel	key	area_of_law	matter_type	area_of_law_matter_type_merged	matter_sub_type	hide_matter_sub_type	tags
2	type	string	string	string	string	string	string	string
3	data	k1	Compliance	Anticorruption	Compliance-Anticorruption		TRUE	Compliance
4	data	k2	Compliance	Due Diligence	Compliance-Due Diligence		TRUE	Compliance
5	data	k3	Compliance	Investigations	Compliance-Investigations		TRUE	Compliance
6	data	k4	Compliance	Regulatory	Compliance-Regulatory		TRUE	Compliance
7	data	k5	Corporate	Finance	Corporate-Finance		TRUE	Corporate
8	data	k6	Corporate	Merger & Acquisitions	Corporate-Merger & Acquisitions		TRUE	Corporate
9	data	k7	Disputes	Insured	Disputes-Insured		TRUE	Disputes
10	data	k8	Disputes	Commercial	Disputes-Commercial		TRUE	Disputes
11	data	k9	General	Advice & Counsel	General-Advice & Counsel		TRUE	General
12	data	k10	Intellectual Property	Patent	Intellectual Property-Patent	Infringement	FALSE	Intellectual Property
13	data	k11	Intellectual Property	Patent	Intellectual Property-Patent	Prosecution	FALSE	Intellectual Property
14	data	k12	Intellectual Property	Trademark	Intellectual Property-Trademark		TRUE	Intellectual Property
15	data	k13	Labor & Employment	Terminations	Labor & Employment-Terminations		TRUE	Labor & Employment

In order for the list to be correct it must have the following rows:

- **fieldLabel**: The fieldLabel row (Row 1) should match the name of the Field in Onit exactly (e.g., **area_of_law**)

- **type:** The type row (Row 2) defines the column's datatype. The following datatypes are available: **string, date, datetime, number, decimal** or **boolean**.
- **data:** The data row (Row 3 and beyond) identifies to Onit that all values in the row contains the actual values that an Onit App can work with to populate dropdowns, hide/show fields, and activate/deactivate tags.

In addition, note the following information regarding the columns shown above:

- **area_of_law_matter_type_merged:** This should be a concatenation of Column C and Column D, with a hardcoded dash (-) between the two values. It is recommended that you use Excel's **=concatenate** function to populate this column.
- **hide_matter_sub_type:** For any given row, this value should equal **TRUE** if Column F is null. Otherwise this value should be **FALSE**. It is recommended that you use an Excel calculation similar to the following to populate the value of this column: **=IF(ISBLANK(F3),TRUE,FALSE)**.

Once you're done creating and uploading the list, create a new test Record on the **Matters** App to ensure that you can see the correct **area_of_law**, **matter_type**, and **matter_subtype1** values.

Problem: Filtering Dropdown Options

The **matter_type** and **matter_subtype1** dropdowns are filtered based on the value selected by the user one level above in the overall matter taxonomy (values in the **area_of_law** dropdown are the highest level in the matter taxonomy and require no filter). This is achieved using standard Listcombo filtering logic, as shown below.

Matter App Builder

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Fields definition

Fields			
1	1	matter_email_a...	Matter Email
1	1	matter_descript...	Brief Matter Description
1	1	area_of_law	Area Of Law
1	1	matter_type	Matter Type
1	1	matter_subtype_1	Matter Sub Type
1	1	matter_subtype_2	Matter Subtype 2
1	1	legal_entity	Legal Entity BelongsTo
1	1	selectable_legal...	Legal Entity
1	1	org_unit_1	Organizational Unit
1	1	maximum_pote...	Maximum Potential Exposure (Matter Currency)
1	1	maximum_pote...	Maximum Potential Exposure (USD)
1	1	mpe_unknown	Maximum Potential Exposure is Unknown
1	1	reserve	Reserve (USD)

Add Delete Move Up Move Down

Properties Advanced

Display in: Launch and View

Launch page tab: Summary

View page tab: Summary

Name: matter_type

Label: Matter Type

Hide label: ☐

Label width:

Type: Listcombo

List: Mattertypes

Search column: matter_type

Value column: matter_type

Filter column: area_of_law

Filter by: area_of_law

Value selection: ☐ Allow user to enter custom text

Delete App Back Next

For example, using the configuration shown above, once a user selects an **area_of_law** the **matter_type** will be automatically filtered.

Moving one level down the hierarchy, depending on the **matter_type** selected, there may or may not be **matter_subtype1** options to choose from. The **matter_subtype1** options must be filtered using two values:

area_of_law and **matter_type**. A hidden Field named **area_of_law_matter_type_merged** is populated via the UI Action **Update Tags Using List Lookup**.

Update Tags Using List Lookup

NameAdd tags from list

Description

Add

Field Updates

FieldHide Matter Sub Type

Liquid{% capture lookup_value %}{{area_of_law}}-{{matter_type}}{% endcapture %}{{ lookup_value | list_lookup: 'Matter'}}

Remove

FieldArea Of Law Matter Type Merged

Liquid{{area_of_law}}-{{matter_type}}

Remove

For example, when a user selects **Corporate** and **Finance** the value of **area_of_law_matter_type_merged** becomes **Corporate – Finance**. Using the value from this hidden Field the UI Action filters the **Mattertypes** list on the **area_of_law_matter_type_merged** column. When the two values match the appropriate matter subtype will be shown in the matter subtype dropdown.

Matter App Builder

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Fields definition

Fields

1	1	matter_email_a...	Matter Email
1	1	matter_descript...	Brief Matter Description
1	1	area_of_law	Area Of Law
1	1	matter_type	Matter Type
1	1	matter_subtyp...	Matter Sub Type
1	1	matter_subtype_2	Matter Subtype 2
1	1	legal_entity	Legal Entity BelongsTo
1	1	selectable_legal...	Legal Entity
1	1	org_unit_1	Organizational Unit
1	1	maximum_pote...	Maximum Potential Exposure (Matter Currency)
1	1	maximum_pote...	Maximum Potential Exposure (USD)
1	1	mpe_unknown	Maximum Potential Exposure is Unknown
1	1	reserve	Reserve (USD)

Add

Delete

Move Up

Move Down

PropertiesAdvanced

Display inLaunch and View

Launch page tabSummary

View page tabSummary

Namematter_subtype_1

LabelMatter Sub Type

Hide label☐

Label width

TypeListcombo

ListMattertypes

Search columnmatter_sub_type

Value columnmatter_sub_type

Filter columnarea_of_law_matter_type_merged

Filter byarea_of_law_matter_type_merged

Value selection☐ Allow user to enter custom text

Delete App

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Problem: Preventing Blank Dropdowns

When a **matter_type** does not have any corresponding **matter_subtype1** values, we then want to prevent a blank **matter_subtype1** dropdown from being shown to the user. To accomplish this we will use a column called **hide_matter_sub_type** in our **Mattertypes** list. This column contains the string **TRUE** when the **matter_subtype1** dropdown should be hidden and **FALSE** when it should be shown. The UI Action **Update Tags Using List Lookup** does a lookup into this column to determine the hidden condition of the **matter_subtype1** dropdown.

Update Tags Using List Lookup

Name: Add tags from list

Description:

Add

Field Updates

Field: Hide Matter Sub Type

Liquid: {% capture lookup_value %}{{area_of_law}}-{{matter_type}}{% endcapture %}{{ lookup_value | list_lookup: 'Matter' Editor

Remove

The Liquid used by the UI Action to perform the lookup into the **Mattertypes** list is as follows:

```
{% capture lookup_value %}{{area_of_law}}-{{matter_type}}{% endcapture %}{{
lookup_value | list_lookup: 'Mattertypes', 'area_of_law_matter_type_merged',
'hide_matter_sub_type' }}
```

This Liquid will perform a lookup using the value of **area_of_law** and **matter_type** (e.g., **Corporate** and **Finance**). The lookup will check values in the **area_of_law_matter_type_merged** column for a match. This lookup will then capture the value of the appropriate **hide_matter_subtype** column and push that into a field by the same name.

The hidden condition on the **matter_subtype** Field is then written to check the value of the **hide_matter_subtype** field, as seen below.

Matter App Builder

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Fields definition

Fields	
1 1 matter_email_a...	Matter Email
1 1 matter_descript...	Brief Matter Description
1 1 area_of_law	Area Of Law
1 1 matter_type	Matter Type
1 1 matter_subtyp...	Matter Sub Type
1 1 matter_subtype_2	Matter Subtype 2
1 1 legal_entity	Legal Entity BelongsTo
1 1 selectable_legal...	Legal Entity
1 1 org_unit_1	Organizational Unit
1 1 maximum_pote...	Maximum Potential Exposure (Matter Currency)
1 1 maximum_pote...	Maximum Potential Exposure (USD)
1 1 mpe_unknown	Maximum Potential Exposure is Unknown
1 1 reserve	Reserve (USD)

Properties Advanced

Value column: matter_sub_type

Filter column: area_of_law_matter_type_merged

Filter by: area_of_law_matter_type_merged

Value selection: ☐ Allow user to enter custom text

Empty text:

Initial value:

Validator:

UI action: Add tags from list

Hidden condition: [hide_matter_sub_type].trim() === 'TRUE' || [area_of_law] === null || [matter_type] === null

Required: ☒ Read only: ☐ Show on dashboard: ☒

Color: Size:

Buttons: Add, Delete, Move Up, Move Down, Delete App, Back, Next

The Javascript for the **Hidden condition** property is as follows:

```
[hide_matter_sub_type].trim() === 'TRUE' || [area_of_law] == '' || [area_of_law] == null || [matter_type] == '' || [matter_type] == null
```

This JavaScript checks if the **hide_matter_sub_type** field is equal to **TRUE**, and if it is then the field will be hidden. This JavaScript will also hide the dropdown when either **area_of_law** or **matter_type** is equal to **null** or if **matter_type** is blank.

In some conditions you may want to hide the **matter_type** dropdown for specific **areas_of_law** that have no further classification (e.g., no **matter_type** options). In this case you would create a JavaScript hidden condition on the matter type Field to specifically check for **areas_of_law** values that do not have **matter_type** options. Your JavaScript should look similar to the following:

```
[area_of_law] == 'Compliance' || [area_of_law] == 'Arbitration' || [area_of_law] == null
```

This JavaScript would hide the **matter_type** dropdown when the **area_of_law** is **Compliance**, **Arbitration**, or when **area_of_law** has not yet been selected.

Problem: Hiding/Showing Non-Taxonomy Fields

By using Tags, we are able to specify which Fields will be displayed to the user for different taxonomies. For example, when you choose a Litigation-focused matter taxonomy set, Onit should then immediately show a series of other litigation-related field.

All Tags should be specified in the **Mattertypes** list that you upload.

1	fieldLabel	key	area_of_law	matter_type	area_of_law_matter_type_merged	matter_sub_type	hide_matter_sub_type	tags	date
2	type	string	string	string	string	string	string	string	date_time
3	data	k1	Compliance	Anticorruption	Compliance-Anticorruption		TRUE	Compliance	2018-04-04T08:23:00
4	data	k2	Compliance	Due Diligence	Compliance-Due Diligence		TRUE	Compliance	2018-04-04T08:00:00
5	data	k3	Compliance	Investigations	Compliance-Investigations		TRUE	Compliance	2018-04-04T08:40:00
6	data	k4	Compliance	Regulatory	Compliance-Regulatory		TRUE	Compliance	2018-04-04T08:00:00
7	data	k5	Corporate	Finance	Corporate-Finance		TRUE	Corporate	2018-04-04T08:00:00
8	data	k6	Corporate	Merger & Acquisitions	Corporate-Merger & Acquisitions		TRUE	Corporate	2018-04-04T08:00:00
9	data	k7	Disputes	Insured	Disputes-Insured		TRUE	Disputes	2018-04-04T08:00:00
10	data	k8	Disputes	Commercial	Disputes-Commercial		TRUE	Disputes	2018-05-04T08:00:00
11	data	k9	General	Advice & Counsel	General-Advice & Counsel		TRUE	General	2018-04-04T08:00:00
12	data	k10	Intellectual Property	Patent	Intellectual Property-Patent	Infringement	FALSE	Intellectual Property	2017-04-54T08:00:00
13	data	k11	Intellectual Property	Patent	Intellectual Property-Patent	Prosecution	FALSE	Intellectual Property	2018-04-04T08:43:00
14	data	k12	Intellectual Property	Trademark	Intellectual Property-Trademark		TRUE	Intellectual Property	2018-04-04T08:00:00
15	data	k13	Labor & Employment	Terminations	Labor & Employment-Terminations		TRUE	Labor & Employment	2018-04-04T08:00:00

Each Tag specified in your **Mattertypes** list must have a corresponding Tag created in Onit. To create new Tags, navigate to the **Tags** node in your **Matter** App's Advanced Designer page.

Matter

Advanced Designer

Apps

Advanced Designer

Business Rules

Actions

Tags

Fields

Create a new Tag for each Tag in your **Mattertypes** list by clicking the **Add** button. Name the Tag the as it appears in your Mattertypes list and click **Ok**.

Tags

Add

Commercial

Name Commercial

Provide a brief description on the changes you made (optional)

Comment

Delete Ok

The UI Action **Update Tags with List Lookup** will use values from the **tags** column to hide/show the appropriate Fields. When the Tag value extracted by the UI Action and the Tag applied to a Field match, the Field will be shown.

Tags are applied to Fields in the **Matter** App Wizard under the **Advanced** tab of that Field. To apply a Tag to a Field, chose the correct Field in the Wizard and click on the **Advanced** tab. Under the **Tags** box chose the appropriate Tags for that Field. Once you are done assigning Tags save your changes.

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Fields definition

Fields

11matter_descript...Brief Matter Description

11area_of_lawArea Of Law

11matter_typeMatter Type

11matter_subtype_1Matter Sub Type

11matter_subtype_2Matter Subtype 2

11legal_entityLegal Entity BelongsTo

11selectable_legal...Legal Entity

11org_unit_1Organizational Unit

11maximum_pot...Maximum Potential Exposure (Matter Currency)

11maximum_pote...Maximum Potential Exposure (USD)

11mpe_unknownMaximum Potential Exposure is Unknown

11reserveReserve (USD)

11current_approv...Current Approved Settlement Amount

AddDeleteMove UpMove Down

PropertiesAdvanced

DescriptionMaximum financial risk for this matter, Worst case estimate - Base Currency (Is it defined in Base or Maximum Exposure?)

Tags

Calculated

Search

Facet

Include in results

Validations

Validate unique

Validation Filter

Uniqueness ScopeComma separated list: p_field, p_another_fi

Reporting

Delete App

BackNext

Fields not assigned a Tag or a JavaScript-based hidden condition will always show.

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