



Q-Law Town Hall Meeting – June 3, 2020

Barcode and Document Batch Import

Barcodes are unique by ourfile and type. They can help automate the document management process. Barcodes are used to efficiently identify documents that are scanned and saved to a folder. Once in the desired folder, a barcode reader will scan the folder and read them. Once the ourfiles are identified, the reader can then move the documents/files into the respective account folders generating links in the scanfile table. Barcodes can also be printed onto labels and affixed to incoming correspondence for later identification by a barcode reader.

I Installing Barcode Font and Reader on a Workstation

1. Client Instructions:

A. **Q-Law Fox**: Download the files from the links provided by Vertican. Unzip and save to the qlaw drive:\qlaw\install folder.

- Link for Q-Law Fox IDAutomationHC39M Barcode:
<ftp://qsoft:Qupdate88@ftp.vertican.com/qlaw/BARCODE.zip>
 - a. The first file, DTKBarcodeSetup.msi, will install the reader. Drag and drop this file onto the desktop of each workstation that will need to utilize the reader for scanning. Right-click on this file and select **Install** and follow the prompts.
 - b. The second file, INSTALL, will automatically install the barcode. Drag and drop this file onto the desktop of each workstation that will be creating the barcode on the document templates or generating barcode labels. Right-click on the file and **Run as Administrator** and follow the prompts.

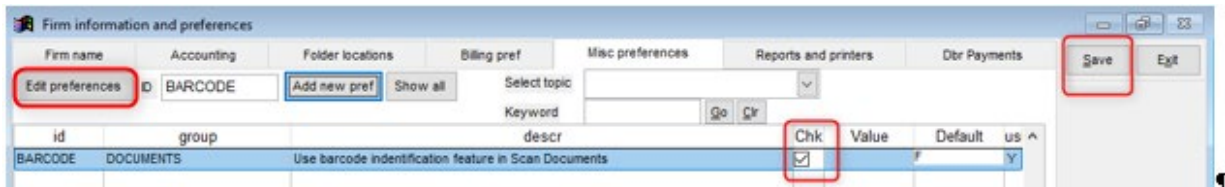
B. **Q-LawE Client Instructions**: Download the applicable barcode installation file from the links provided by Vertican or below. Unzip and save to the qlaw(E) drive:\qlaw(E) \install folder. These folders contain install files for both the requested fonts and the barcode reader if applicable.

- **Link for Q-LawE IDAutomationHC39M Barcode**:
<ftp://qsoft:Qupdate88@ftp.vertican.com/qlawe/SQLBARCODE.zip>
 - a. The first file, DTKBarcodeSetup.msi, will install the reader. Drag and drop this file onto the desktop of each workstation that will need to utilize the reader for scanning. Right-click on this file and select **Install** and follow the prompts.
 - b. The second file, INSTALL, will automatically install the barcode. Drag and drop this file onto the desktop of each workstation that will be creating the barcode on the document templates or generating barcode labels. Right-click on the file and **Run as Administrator** and follow the prompts.



- **Link for Q-LawE QR Barcode:**
<ftp://qsoft:Qupdate88@ftp.vertican.com/qlawe/SQLQRBARCODE.zip>
 - INSTALL will install the IDAutomationHC39M Barcode font and barcode. Drag and drop this file onto the desktop of each workstation that will be creating the barcode on the document templates or generating barcode labels. Right-click on the file and **Run as Administrator** and follow the prompts.
 - IDAutomationDMatrix will install the QR Barcode Font. Drag and drop this file to the desktop of each workstation that will be creating the barcode on the document templates or generating barcode labels. Right-click on the file and click **Install**, then follow the prompts.
 - IDAutomationDMATRIX.DLL is a dll that should be copied to the c drive of each workstation that will be creating the barcode on the document templates or generating barcode labels. This DLL will need to be registered using the Windows command prompt **Run as Administrator**.
 - There is no reader to install. The reader would be either integrating with our vMedia product or through a third-party document management software.

2. Firm Preference: BARCODE will need to be checked.



II Adding a Barcode to the Document Template

A. Standard IDAutomationHC39M Barcode

It is important the barcode be entered into the document template with the exact format as detailed below. All items in the barcode are required to be a specific length in themselves and, if there are less characters than what is required, you will need to pad that data with the appropriate number of dashes in order to fill those spaces to match the required length. Both the document code and the page number are document-specific and do not change from account to account, so these two items are hard coded into the barcode along with any dashes. The one variable in the barcode is the ourfile number. To ensure the ourfile number is the correct length, use a custom field that will automatically add the dashes to the ourfile number to correctly report the number of characters. The custom field syntax is listed below and can be copied and pasted or typed as is into an available custom field box. Alternatively, create a BARCODE custom field in the custom field table that can easily be inserted in the correct custom field box on the Q-law(E) template screen for each of the documents needing a barcode.

1. Characteristics of the standard barcode for Q-LawE and Q-Law Fox:

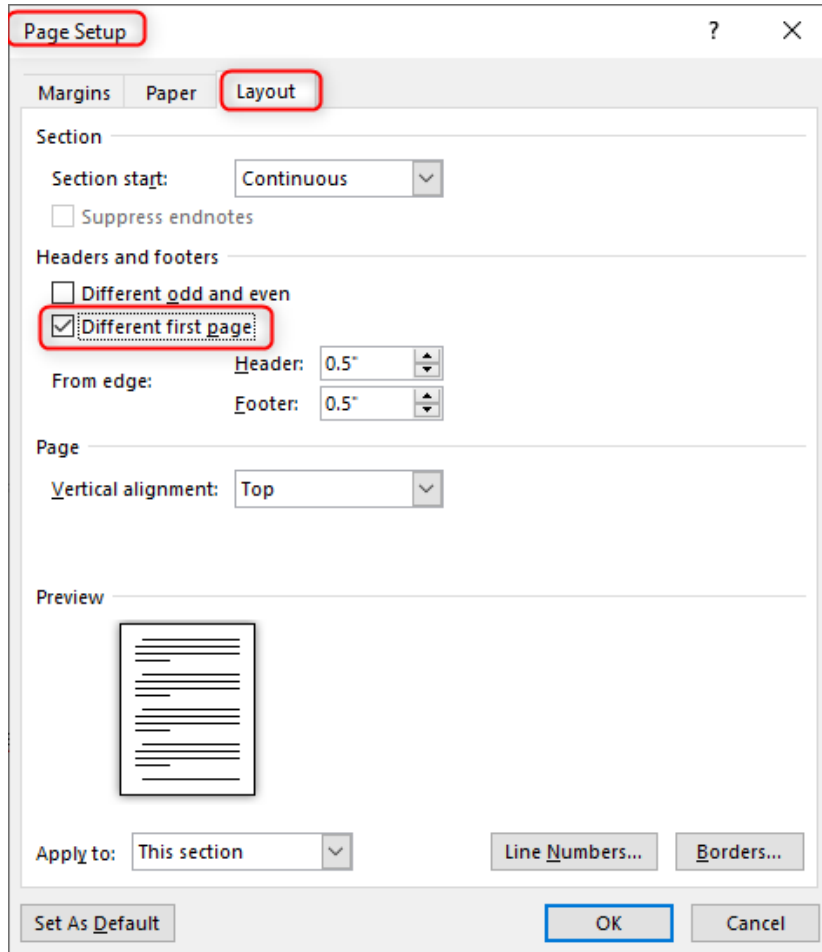
- a. The barcode must be located anywhere on the template, preferably the first page.
- b. Do not put the barcode in a continuous header or footer. The barcode can only be on the document one time.
- c. The barcode must be a font size of 12.
- d. The font used for the barcode is called "IDAutomationHC39M".
- e. Character length requirements:
 - i. In Q-Law Fox, the file number located in the barcode must be 6 characters in length. In order to ensure the length limit is met for ourfile numbers that are not 6 characters, you must utilize a formula in a custom field to insert dashes when needed so that the ourfile will be a total of 6 characters. Example: 1234--. The custom field string should be: **PADL(ALLTRIM(DEBT.OURFILE),6,"-")**.
 - ii. In Q-Law Fox, the document code must be 4 characters – if the DocID being used is only 3 characters, insert a dash for the fourth character. Example: ABC-.
 - iii. In Q-LawE SQL, the file number located in the barcode must be 10 characters in length. In order to ensure the length limit is met for ourfile numbers that are not 10 characters, you must use a formula in a custom field to insert dashes when needed so that the ourfile will be a total of 10 characters. Example 1234-----. The custom field string should be: **PADL(ALLTRIM(DEBT.OURFILE),10,"-")**.
 - iv. In Q-LawE SQL, the document code must be 10 characters – if the DocID being used is only 3 characters, insert a dash for the remaining 7 characters. Example: ABC-----.
 - v. Number of pages/PDF files must be 2 characters and can be padded with dashes Example: 1-.
- f. The printer cannot be a dot matrix printer.



- g. When scanning, a photocopy cannot be used; it must be the original.
 - h. When scanning the documents, turn on the Greyscale setting on the scanner.
 - i. The recommended DPI should be set to 300 on the scanner; however, you can experiment with the DPI to see what works best with your scanner to enable the reader to read the barcode.
 - j. The barcodes must be horizontal on the document.
2. Add the barcode to the template:
- a. Begin by inserting the custom field string/code for the barcode into the designated custom field box. In the example below we used a custom field code in the **custom20** box on the **Custom document fields** tab of the template setup.

Document info	Custom document fields	Wp mergefields	Clist	Changes
Custom fields require a valid expression to be in the field, this data is then available in template documents as Custom01, etc. Q-Soft offers assistance with these custom fields, send us an email with description of data you need., we will email back data you enter here				
Custom01		#11		Custom # 01
Custom02		#12		Edit Expression
Custom03		#13		Build Expression
Custom04		#14		Test Expression
Custom05		#15		Help
Custom06		#16		Mergefields
Custom07		#17		Data Dictionary
Custom08		#18		MulticclaimSetup
Custom09		#19		Merge codes
Custom10		#20	==BARCODEE	lookup
				Insert custom
				Add custom MF

- b. In the merge document, put the cursor in the location where you want the barcode to be – it can be in a text box, directly in the document, or in a footer. If putting it in a footer, you **MUST** put it on the first page **ONLY** by customizing the layout format on the word document to show that headers/footers will be different on first page.



- c. You may change the font for now to something easy to read such as “Times New Roman” or “Arial”. This will be changed later.
- d. Enter the required barcode format (**Q-Law Fox**), for example *Q<<custom20>>SAC-1-*
- i. *Q – The barcode must begin with an asterisk and a capital Q.
 - ii. <<custom20>> – Merge field from the data source that is programmed as follows: PADL(alltrim(debt.ourfile),6,'-').
 - iii. SAC – The document code **MUST** be 4 characters.
 - iv. 1- – Number of pages/pdfs (must be 2 characters).
- * Just as every barcode must start with an asterisk, every barcode must also end with an asterisk.

- v. Now change the text into the correct barcode font by highlighting the barcode format and then changing the font to “IDAutomationHC39M”.



- e. Enter the required barcode format (Q-LawE), for example *Q<<custom20>>SAC-----1-*

 - i. ***Q** – The barcode must begin with an asterisk and a capital Q.
 - ii. **<<custom20>>** – Mergefield from the data source that is programmed as follows: PADL(alltrim(debt.ourfile),10,'-').
 - iii. **SAC** – The document code MUST be 10 characters.
 - iv. **1-** – Number of pages/pdfs (must be 2 characters).

* Just as every barcode must start with an asterisk, every barcode must also end with an asterisk.

- v. Now change the text into the correct barcode font by highlighting the barcode format and then changing the font to “IDAutomationHC39M”.



- f. Generate the document either as a one-off through an account or as a batch through the TAS Documents function. Q-LawE has incorporated an encoder to recognize the custom field to create the barcode.

B. QR Idautomation D Matrix Barcode

Available in Q-LawE only, this barcode is used for integration between Q-LawE or a third-party document management system.

1. Characteristics of the QR barcode in Q-LawE:
 1. You MUST use **custom20** if using standard data sources (merge1.csv).
 2. If you are using the extended merge data source (merge_ext.csv), then the custom string MUST be in a merge field named USERINIT.
 3. The custom field string should be:


```
'XDC='+PADL(ALLTRIM(DEBT.OURFILE),10,'0')+ '|XDT=NOTICE0000'
```

 - i. XDC- triggers the encoder
 - ii. PADL(alltrim(debt.ourfile),10,'0') – is the string for the ourfile with the full length to be 10; if the ourfile is 1234, the string will make it 1234000000
 - iii. |XDT= triggers the DocID lookup

4. NOTICE0000 is the DocID; since it must be 10 characters, use the actual DocID and add zeros to the end to make it a total of 10 characters.
5. The barcode must be located anywhere on the template.
6. Do not put the barcode in a continuous header or footer; the barcode can only be on the document one time.
7. The barcode must be a font size of 14.
8. The font used for the barcode is called "IDautomationDMatrix".
9. Be sure to highlight the merge field and ensure you are using the IDautomation DMatrix font size 14.



10. This is how the final merged barcode will appear:



III Scanning the Documents

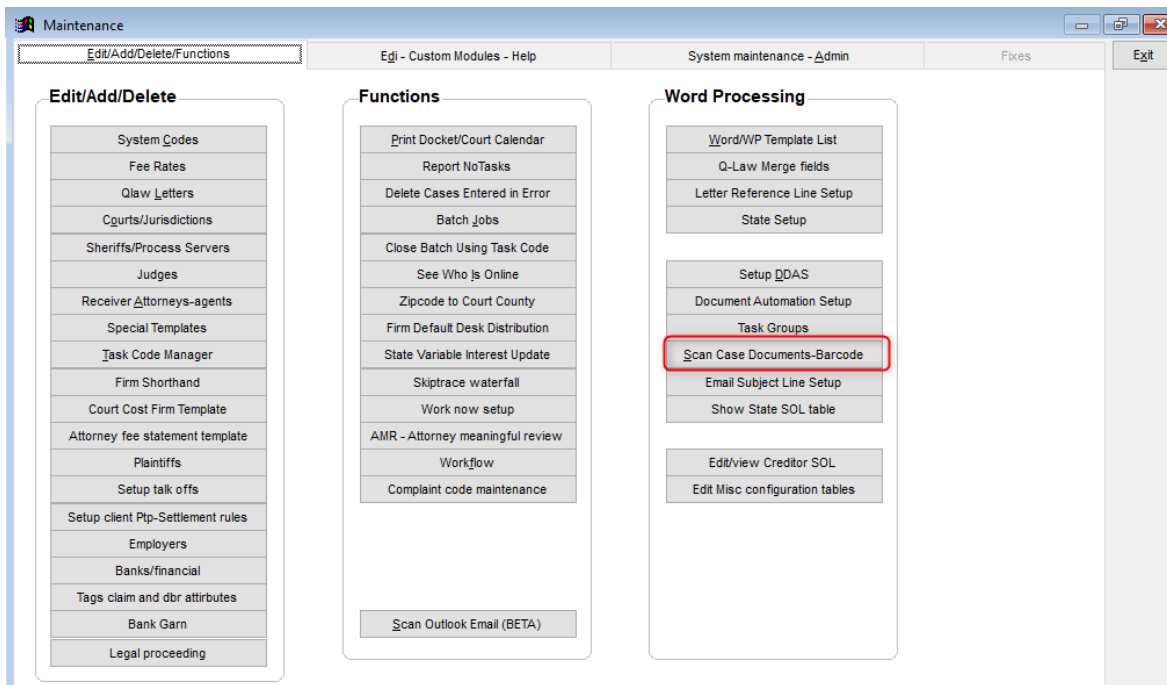
Once the document(s) are returned to your office, the documents containing a barcode or not, they can be scanned into a folder on your network. Q-Law(E) can be set to use a default scan folder by setting the firm preference id SCANFOLD.

id	group	descr	Chk	Value	Default	usub	Type
SAVECHKSCN		Save the scanned imported checks	<input checked="" type="checkbox"/>	PAIDSAVE		Y	FIRM
CLIENTSCAN	CLIENT	Use scanfilec.dbf for client document storage.	<input type="checkbox"/>		F	Y	FIRM
BARCODE	DOCUMENTS	Use barcode identification feature in Scan Documents	<input checked="" type="checkbox"/>		F	Y	FIRM
SCANTASK	DOCUMENTS	Assign review task to cases with new scanned documents	<input type="checkbox"/>	REVIEWDOC	REVIEWDOC	Y	FIRM
DOCDEFAULT	DOCUMENTS	Indicate drive letter where ldocs folder is located, firm wide preference	<input checked="" type="checkbox"/>	U:		Y	FIRM
FORWDOCS	FORWARDING	When selecting documents to send - what groups/desc should be used: Bigval	<input type="checkbox"/>		F	Y	FIRM
IMGSELE	IMAGE VIEWER	Selection to Use for docs to send to the Qlaw Image viewer	<input type="checkbox"/>		F	Y	FIRM
SCANFOLD	SCAN	Set a different default folder for central scanning	<input checked="" type="checkbox"/>	c:\qlaw\lscan		Y	FIRM
SCANLOCAL	SCAN LOCAL DRIVE	Local scanning drive letter	<input checked="" type="checkbox"/>	c:\	F	Y	FIRM
QEMAILSCAN	USESSL	Enable the use of SSL encrypted connections when using QEMAILSCAN	<input type="checkbox"/>			Y	FIRM

IV Importing Using Scan Case Documents-Barcode

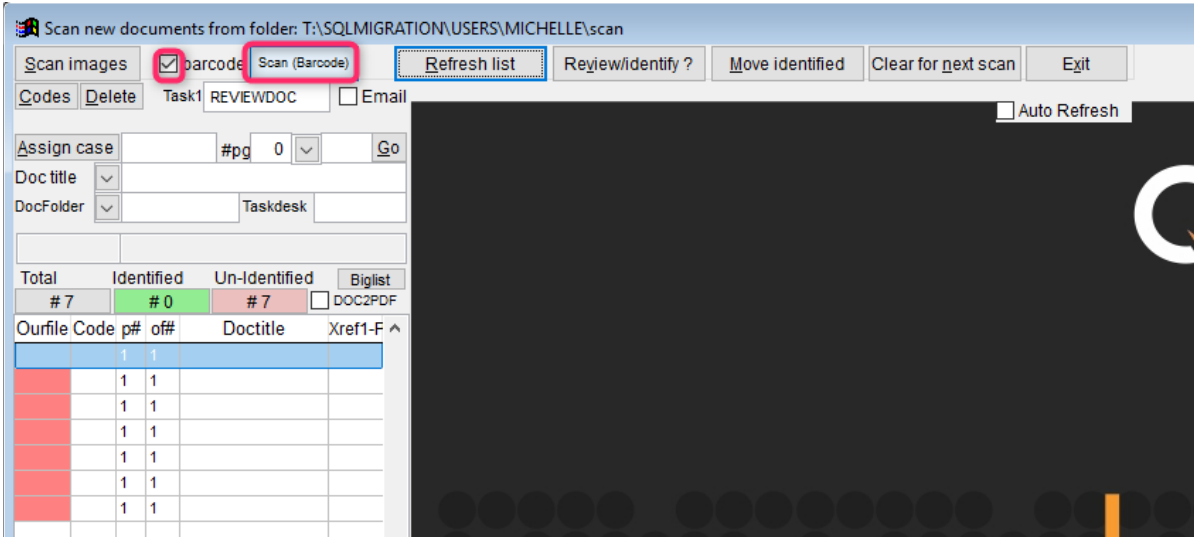
Once you have scanned all the documents to your system, you can begin using **[Scan Case Documents-Barcode]**.

1. From the **Maintenance** menu, select the **Edit/Add/Delete/Functions** tab and click **[Scan Case Documents-Barcode]**.

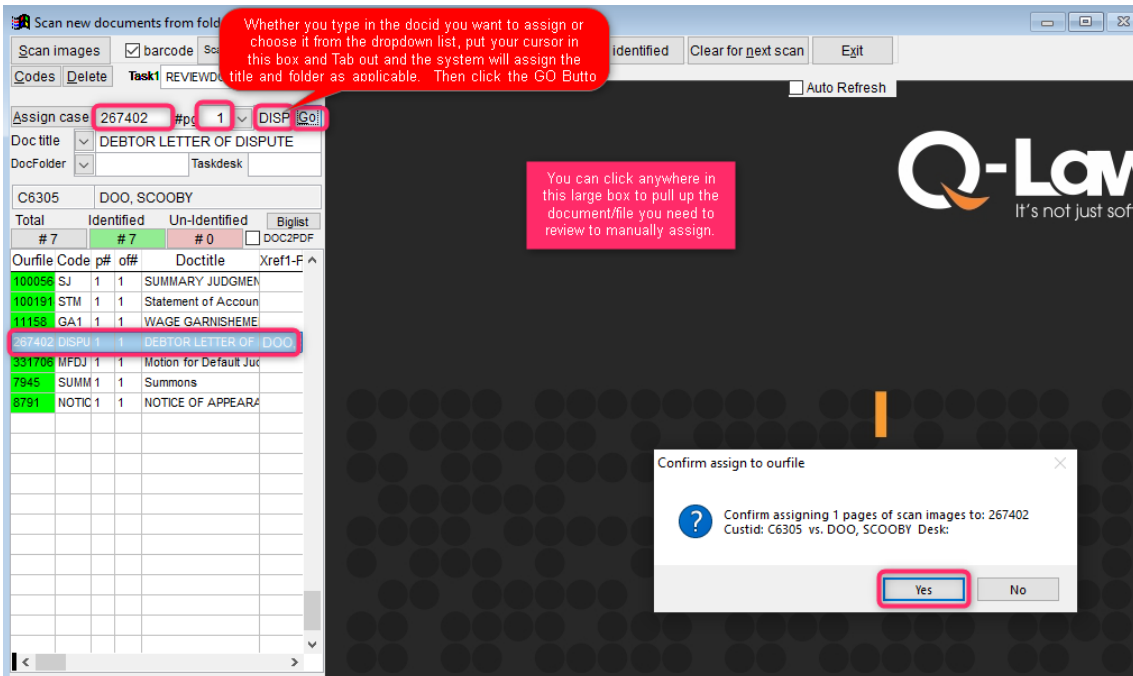


2. Click **[Clear for next scan]**.
3. Then click **[Refresh list]**. At this point you can use the default folder you set in the firm preference or you could browse to a new folder location.
4. Click **[OK]** once you have located the file in which your scanned documents are located.

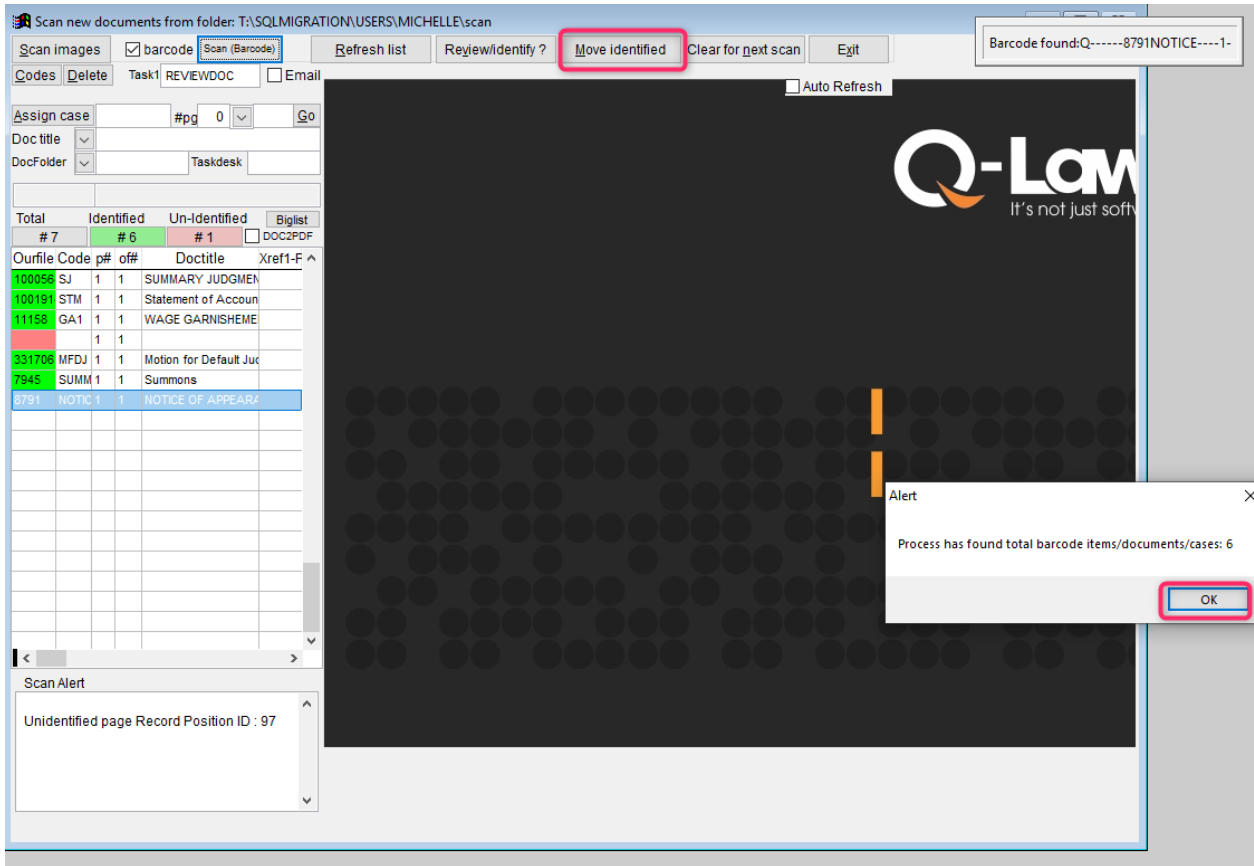
- Finally, make sure the barcode checkbox is checked and click **[Scan (Barcode)]**. Q-Law(E) will read the barcode electronically and assign the correct ourfile, DocID, and number of pages/pdfs.



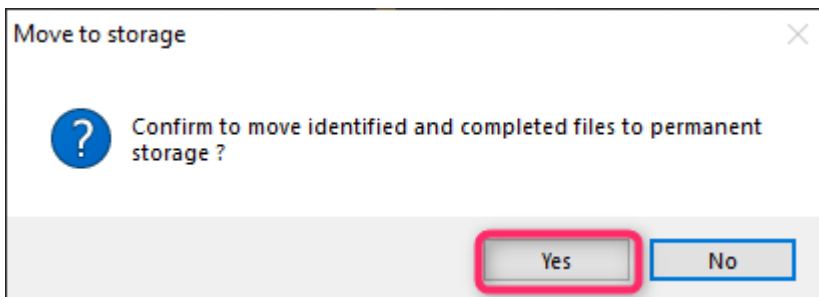
- When the process has identified the barcodes and assigned the ourfiles/DocIDs, you will receive a prompt indicating how many were identified. Click **[OK]**.
- If there are any documents without barcodes or unidentified, you can now manually assign them. Click on the item in the grid on the left, then double-click on the large Q-Law box on the right. This will open the file to view the document. Then you can fill in the ourfile, choose the DocID, and tab out of the field and click **[GO]** to have the system fill in the info in the grid on the bottom.



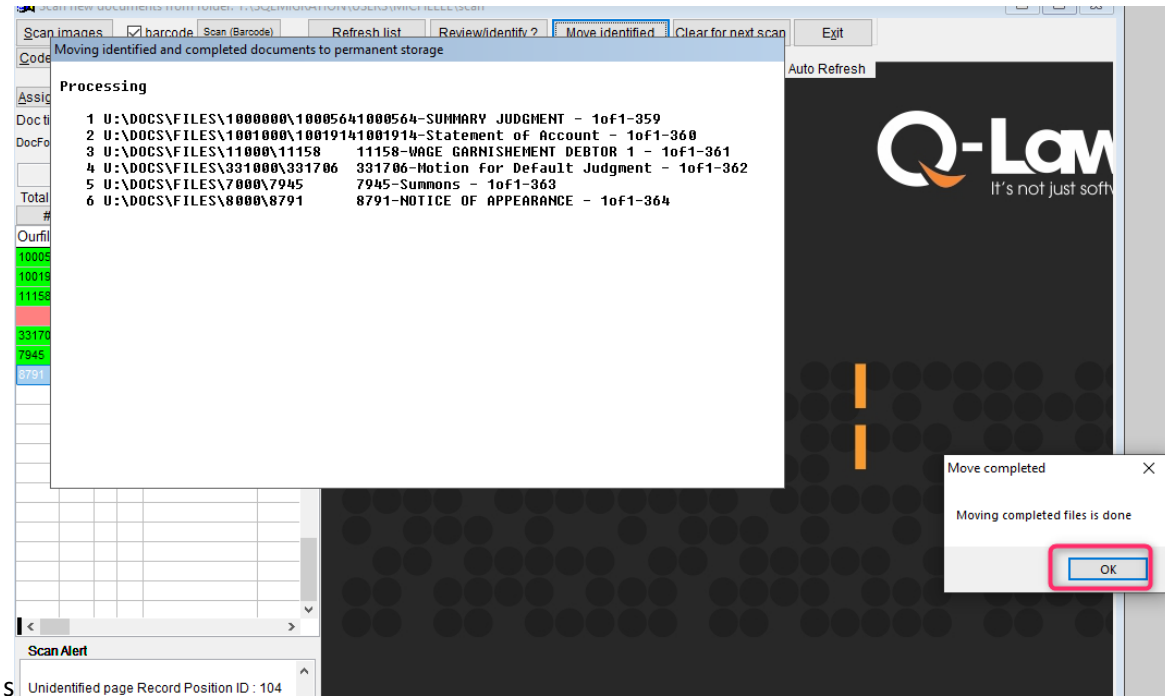
9. Click [Move Identified].



10. Click [Yes] to confirm the moving of the files from your scan folder into the account files for storage.



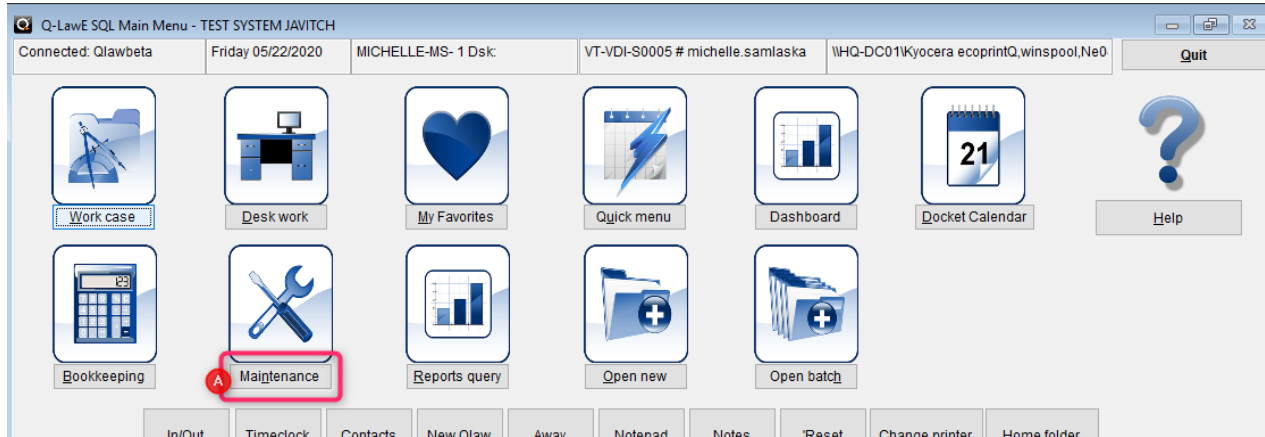
11. The documents will now be moved into their respective accounts, and each account will be notated with the document name that has just been imported. When the move of the files is complete, a prompt will appear; click **[OK]** to conclude the process.



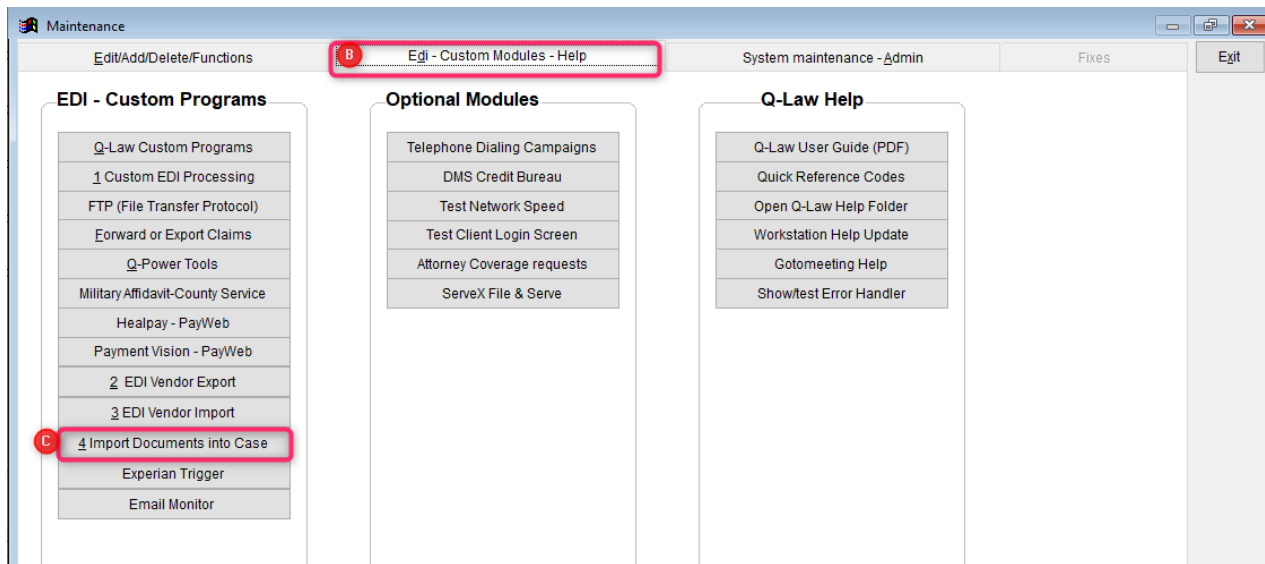
V Document Batch Import

Document batch import is designed to import documents that are received as files from your client, vendors, or from other sources. This process can expedite moving documents from a folder into the individual account files.

1. Requirements: There are only two requirements to be able to identify and move the file into the account files.
 - A. The naming convention of the document file must contain one of the following: ourfile, custfile, ncustfile, fccustfile or preourfile, all of which are maintained in the debt table.
 - B. You must be able to identify the account number you choose to use. For example, the ourfile begins in the first character position and ends at the dash (-).
2. Creating a new document batch import process:
 - A. From the **Main** menu, click **[Maintenance]**.

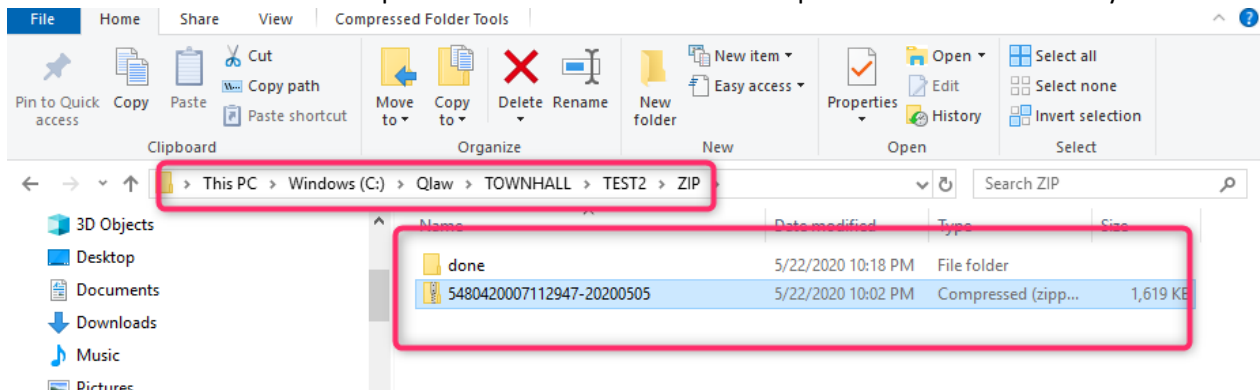


- B. Then select the **Edi - Custom Modules - Help** tab.
- C. Click **[Import Documents into Case]**.



- D. Edit – Click **[Edit]** to begin the process of editing/deleting an existing or creating a new import.
- E. Add – Click **[Add]** to create a fresh import screen to set up.
- F. Add Duplicate – You could also choose to duplicate from an existing document import and just make a couple of modifications; to duplicate, select an import to duplicate from the grid at the bottom, then click **[Add duplicate]**.
- G. Delete – After clicking **[Edit]**, if you want to delete a document import, locate the import to be deleted in the bottom grid, then click **[Delete]**.
- H. **Group** – Give the import process a group to help identify if it belongs to a specific vendor, client, etc.
- I. **Desc** – Give the import process a brief description.
- J. **Source folder** – The location in which the files are currently located.

- K. **File mask** – Leave as *.* or use the extension; this could be used to help identify which documents to import if there is more than one type of document in the folder. Example: a vendor sends you military affidavits, and the naming convention will always have a mil.pdf at the end; you could then put *.mil.pdf in that box.
- L. **Typedoc** – if importing a link to a document (you are not moving the document location), leave this field blank; otherwise this is the extension to give the document. Example: PDF, JPG, TIF.
- M. **[Open import folder]** – Enables you to open the source folder directly in a windows browser.
- N. **[Process import/linking selected group]** – After setting up the document batch import process, use this button to run the process.
- O. **Doctype ID** – The DocID to assign to the document link created on the documents tab of the account (scanfile); can be selected using **[Select DocID]**.
- P. **Auto Unzip if files are in a ZIP archive** – Check this box if you have a zip file of multiple pdfs, for example, but further setup **MUST** be done for the unzip process and import to work:
 - A requirement to use the unzip function is that all documents within the zip file must be the same document type (same DocID will be assigned to all).
 - You will not be able to use the **File mask** option above, just leave it as *.*.
 - Create a file inside the source file and call it ZIP. Example: Source file is U:\import\documents\AODs inside the documents folder, create a ZIP folder, then you also have U:\import\documents\AODs\ZIP.
 - Create a DONE folder inside the ZIP folder.
 - Place the zip file of all the documents to be imported into the ZIP folder you created.

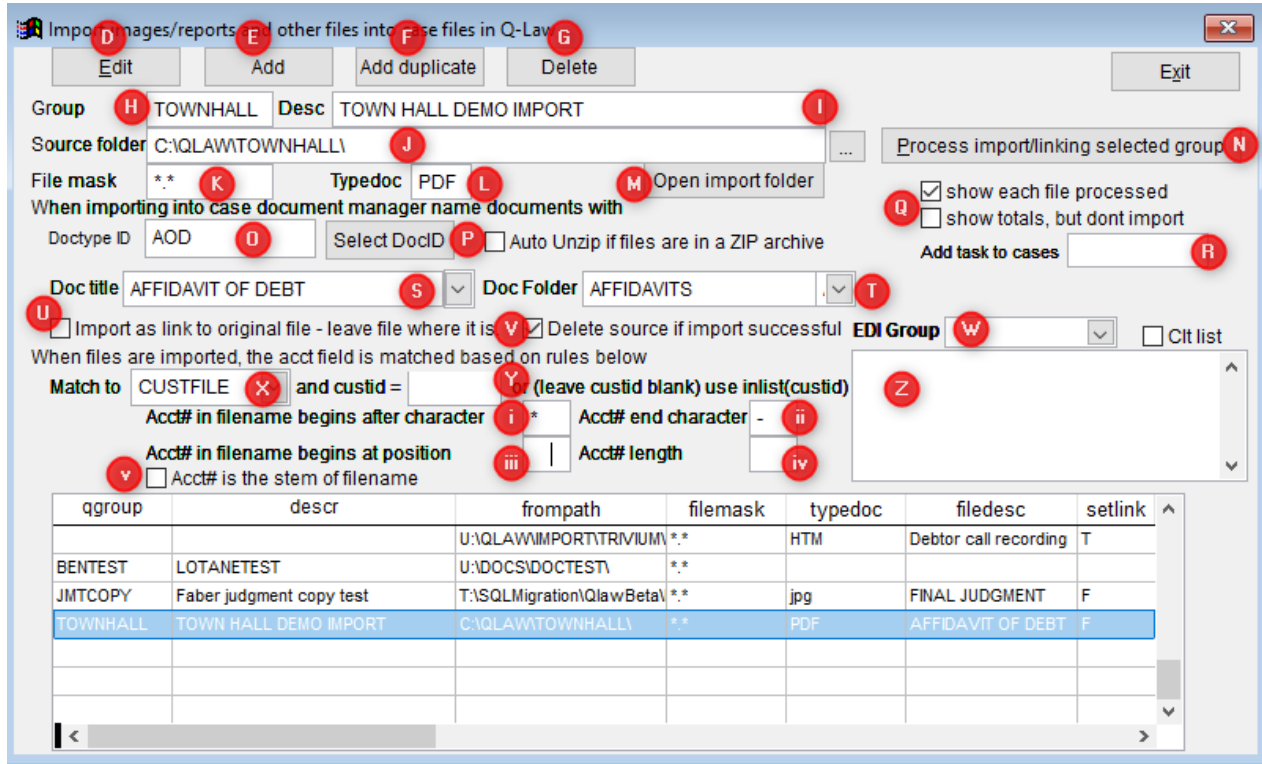


- Then process the import using **[Process import/linking selected group]** or Job Scheduler. The system will unzip what you placed in the ZIP folder and extract the documents contained therein into the source folder.
 - The system will move the original zip file into the DONE folder and import the individual document files into the accounts.
- Q. **Show each file processed or show totals, but don't import** – These are processing options. Upon completion of the **[Process import/linking selected group]**, you can choose to see a statement showing each file that was processed (normally checked) or, if you just want to



test the process, you may select the option to show the same totals but not actually import them.

- R. **Add task to cases** – You can input a task code to always add to the accounts upon a document being imported using this process.
- S. **Doc title** – Will automatically be assigned when you select the DocID, or you can select it from the dropdown list.
- T. **Doc Folder** – Will also be automatically be assigned when you select the DocID, or you can select it from the dropdown list.
- U. **Import as link to the original file** – If you select this option, the documents will not be moved into the individual account files, but instead a link will be created on the documents tab of the account file (SCANFILE) to the original source file.
- V. **Delete source if import successful** – Checking this option will move a copy of the document file into the individual account files and create the appropriate link on the documents tab (Scanfile); if that is successful, then the system will delete the original document from the source file.
- W. **EDI Group** – You can choose a specific EDI group from the dropdown if this document import process is related to the EDI.
- X. **Match to** – The account number field that would be in the document naming convention of the document files to be imported; this setting is how to tell this system which account number field you were matching to in order to complete a successful import (ourfile, custfile, ncustfile, fccustfile, preourfile).
- Y. **and custid =** – Input the custid if the import process is directly related to one client.
- Z. **inlist(custid)** – Input an inlist of custids if the import process is client(s)-specific. Example: inlist(custid,'HOA1','HOA2','HOA3','HOA4').
 - i. **Acct# in file name begins after character** – If the account number you are matching to starts at the first character of the naming convention, put an asterisk; if the document name is BRI-123456789_05132020. 123456789 is the custfile, so you would put * in this box.
 - ii. **Acct# end character** – In the example BRI-123456789_05132020. 123456789, the account number, started right after the dash and ended just before the underscore, so put an underscore in this box.
 - iii. **Acct# in filename begins at position** – The character number the account number begins. In this example, the account number begins at character “5”; therefore, put a 5 in this box. BRI-123456789_05132020. 123456789. Note this option specifically means the account number you are using is always the same number of characters.
 - iv. **Acct# length** – The character number the account number ends. In this example, the account number ends at character “13”; therefore, put a 13 in this box. BRI-123456789_05132020. 123456789. Note this option specifically means the account number you are using is always the same number of characters (always 9 characters long in the example).
 - v. **Acct# is the stem of filename** – Means that the account number selected to match existing accounts in Q-Law(E) is the name of the document that is being imported.



Import images/reports and other files into case files in Q-Law

Edit Add Add duplicate Delete Exit

Group **TOWNHALL** Desc **TOWN HALL DEMO IMPORT**

Source folder **C:\QLAW\TOWNHALL** Process import/linking selected group

File mask ****** Typedoc **PDF** Open import folder

When importing into case document manager name documents with

Doctype ID **AOD** Select DocID Auto Unzip if files are in a ZIP archive

Doc title **AFFIDAVIT OF DEBT** Doc Folder **AFFIDAVITS**

Import as link to original file - leave file where it is Delete source if import successful

When files are imported, the acct field is matched based on rules below

Match to **CUSTFILE** and custid = (leave custid blank) use inlist(custid)

Acct# in filename begins after character ***** Acct# end character **-**

Acct# in filename begins at position **iii** Acct# length **iv**

Acct# is the stem of filename

EDI Group Cit list

qgroup	descr	frompath	filemask	typedoc	filedesc	setlink
		U:\QLAW\IMPORT\TRIVIU\	**	HTM	Debtor call recording	T
BENTEST	LOTANETEST	U:\DOCS\DOCTEST\	**			
JMTCOPY	Faber judgment copy test	T:\SQLMigration\QlawBeta\	**	jpg	FINAL JUDGMENT	F
TOWNHALL	TOWN HALL DEMO IMPORT	C:\QLAW\TOWNHALL\	**	PDF	AFFIDAVIT OF DEBT	F

3. Processing the document imports – you can manually process the import, or you can place it on the Job Scheduler to process.
 - A. First place the document files to import inside the source folder. This can also be done with an FTP process if you are downloading them from a vendor or client. If they are emailed, it is a simple copy and paste into the source folder.
 - B. Manual process:
 - From the **Main** menu, click **[Maintenance]**.
 - Select the **Edi - Custom Modules - Help** tab.
 - Click **[Import Documents into Case]**.
 - Select which import you wish to process by clicking on it in the grid at the bottom of the screen.
 - Then click **[Process import/linking selected group]**.
 - Click **[Yes]** to confirm running the import process.

Import images/reports and other files into case files in Q-Law

Edit Exit

Group: TOWNDEMO Desc: TOWN HALL DEMO IMPORT


Source folder: C:\QLAW\TOWNHALL\TEST2

Process import/linking selected group

show each file processed
 show totals, but dont import

Add task to cases:

Start import

 Confirm import of document files for group: TOWNDEMO - TOWN HALL DEMO IMPORT

Yes
No

qgroup	descr	frompath	filemask	typedoc	filedesc	setlink
JB TEST	JB TEST	U:\DOCS\JBTEST\	*.*	pdf	Agreement	T
		U:\QLAW\IMPORT\TRM\UM\	*.*	HTM	Debtor call recording	T
BENTEST	LOTANETEST	U:\DOCS\DOCTEST\	*.*			
JMTCOPY	Faber judgment copy test	T:\SQLMigration\QlawBeta\	*.*	jpg	FINAL JUDGMENT	F
TOWNHALL	TOWN HALL DEMO ZIP IMPORT	C:\QLAW\TOWNHALL\TEST	*.*	PDF	AFFIDAVIT OF DEBT	F
TOWNDEMO	TOWN HALL DEMO IMPORT	C:\QLAW\TOWNHALL\TEST	*AOD.PDF	PDF	AFFIDAVIT OF DEBT	F



- When the process is complete, you will receive a logfile telling you what ran and how many files were processed.

```
TOWNHALL Descr: TOWN HALL DEMO ZIP IMPORT
-----
Process on date: 05/22/2020 - 22:17:12
Process by user: MICHELLE

Checking for files from todo zip folder...
1 5480420007112947-20200505.ZIP
ChilkatLog:
  UnzipMatchingInto:
    DllDate: Aug 5 2012
    UnlockPrefix: KURTSUZIP
    Username: VT-VDI-S0005:michelle.samlaska
    Architecture: Little Endian; 32-bit
    Language: ActiveX
    VerboseLogging: 0
    verboseLogging: 0
    oemCodePage: 437
    UnzipDir: C:\QLAW\TOWNHALL\TEST2
    MatchPattern: *.*
    onlyNewer: 0
    ignoreZipDirs: 1
    NumUnzipped: 5
  --UnzipMatchingInto
--ChilkatLog
Zipfile moved to folder C:\QLAW\TOWNHALL\TEST2\zip\done\5480420007112947-20200505.ZIP
Reading selected folder: C:\QLAW\TOWNHALL\TEST2

-----
5 Files found to be processed
-----
1 3149044-20200501.PDF Acc# 3149044 Ourfile: 9173
  Docid: AOD Doctitle: AFFIDAVIT OF DEBT
2 3RPO3RP-20200515.PDF Acc# 3RPO3RP Ourfile: 11535
  Docid: AOD Doctitle: AFFIDAVIT OF DEBT
3 5408010009759552-20200501.PDF Acc# 5408010009Ourfile: 311026
  Docid: AOD Doctitle: AFFIDAVIT OF DEBT
4 5414440302198954-20200501.PDF Acc# 5414440302Ourfile: 267230
  Docid: AOD Doctitle: AFFIDAVIT OF DEBT
5 5480420007112947-20200505.PDF Acc# 5480420007Ourfile: 5567
  Docid: AOD Doctitle: AFFIDAVIT OF DEBT

5 document(s) in folder
5 file(s) with matching cases
0 duplicate document(s) in case file - NOT IMPORTED!
0 no match in case file - NOT IMPORTED!
-----
Items copied ok: 5
Items with Errors: 0
END: TOWNHALL
-----
```

- C. Processing the document batch import via Job Scheduler:
 Create a new Job Scheduler and have it run the following program: **do Docimport with "GROUPNAME"**. Below is an example screen; most of the settings will be unique to your firm/system. But the import process is triggered by the run program.

Job detail

Taskid: 316 Active Hold Next Run Date: 05/22/2020 0500 [Next] [Previous] [Exit]

Job Description: TOWN HALL DOC BATCH IMPORT DEMO SETUP Run process local ok

Lan notify User Name: MICHELLE Run on PC ID: VT-VDI-S0005 # michelle.samlas Userlist - users who may run manual scheduler job

Details/notes

Enter program name with parameters to run: do Docimport with "TOWNDEMO"

Frequency: DAILY

Next Run Date: 05/22/2020 [Set date] Excl Saturday Excl Sunday

Time: 05:00 [Set time] Runorder: 0 [Set order]

Next Run Date: 05/22/2020 0500 Run one time

Run if done: 0 [Select job]

Job group: UPDATE

Report E-Mail

Notify by email

If error Email

Last run stats	Hold	Active since
Date: //	//	05/22/2020
Time: //		23:06:07
Run seconds: 0	Reason	By user
Status: //		MICHELLE

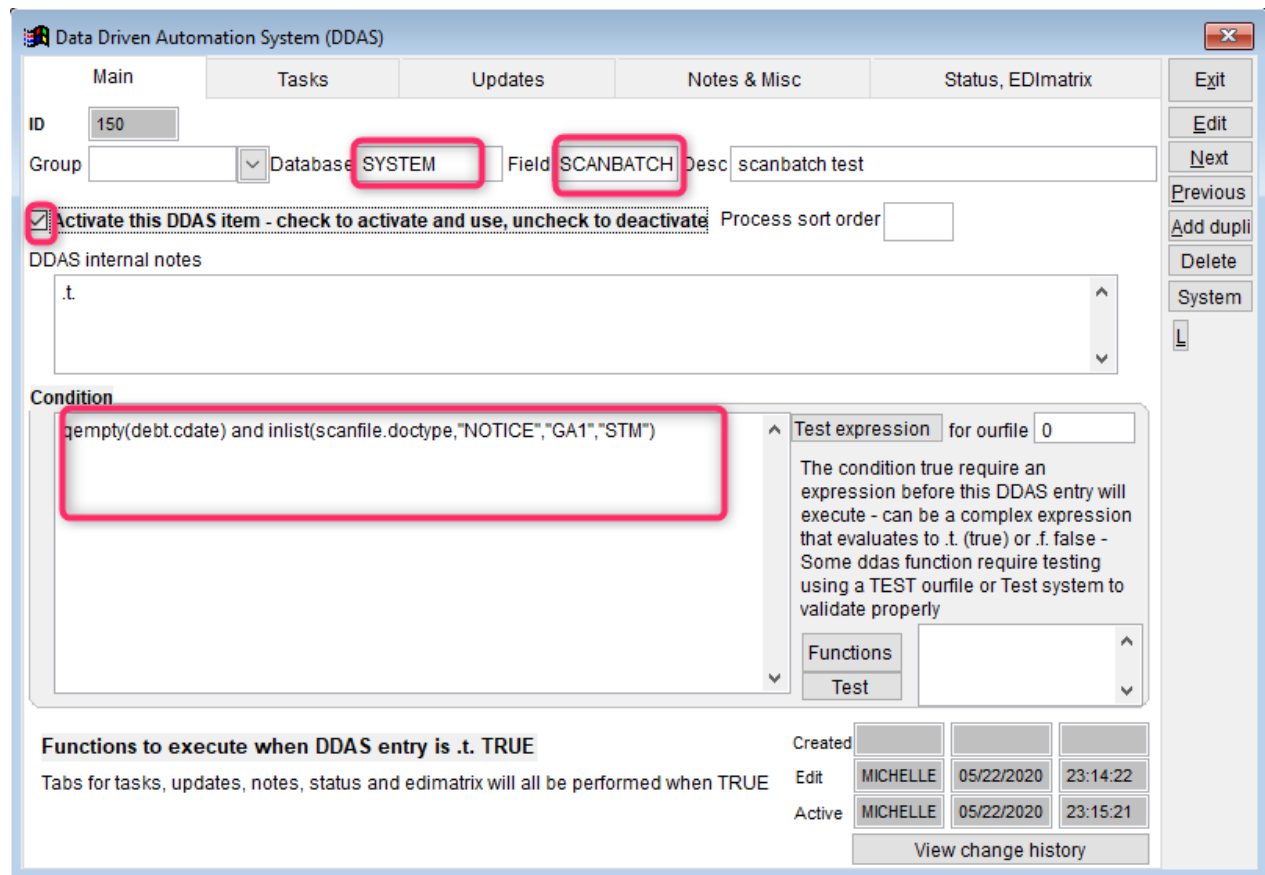
View/edit by lists

- All jobs
- All active jobs
- Daily active
- active on hld
- All jobs EDIT mode
- See job run history

VI DDAS Tips

There are two system triggers related to this presentation. They are as follows:

1. **SYSTEM.SCANBATCH** – This is used when the document is being moved into the account file via **[Scan Case Documents-Barcode]**. It works if you are manually assigning the documents or if the reader is identifying them using barcodes. You will usually identify the DocID in the condition statement so that the DDAS item will only run if a specific DocID or list of DocIDs is added to the file via **[Scan Case Documents-Barcode]**.



Data Driven Automation System (DDAS)

Main Tasks Updates Notes & Misc Status, EDImatrix

ID: 150

Group: Database: SYSTEM Field: SCANBATCH Desc: scanbatch test

Activate this DDAS item - check to activate and use, uncheck to deactivate

Process sort order:

DDAS internal notes: .t

Condition: empty(debt.cdate) and inlist(scanfile.doctype,"NOTICE","GA1","STM")

Test expression: for ourfile 0

The condition true require an expression before this DDAS entry will execute - can be a complex expression that evaluates to .t. (true) or .f. false - Some ddas function require testing using a TEST ourfile or Test system to validate property

Functions: Test

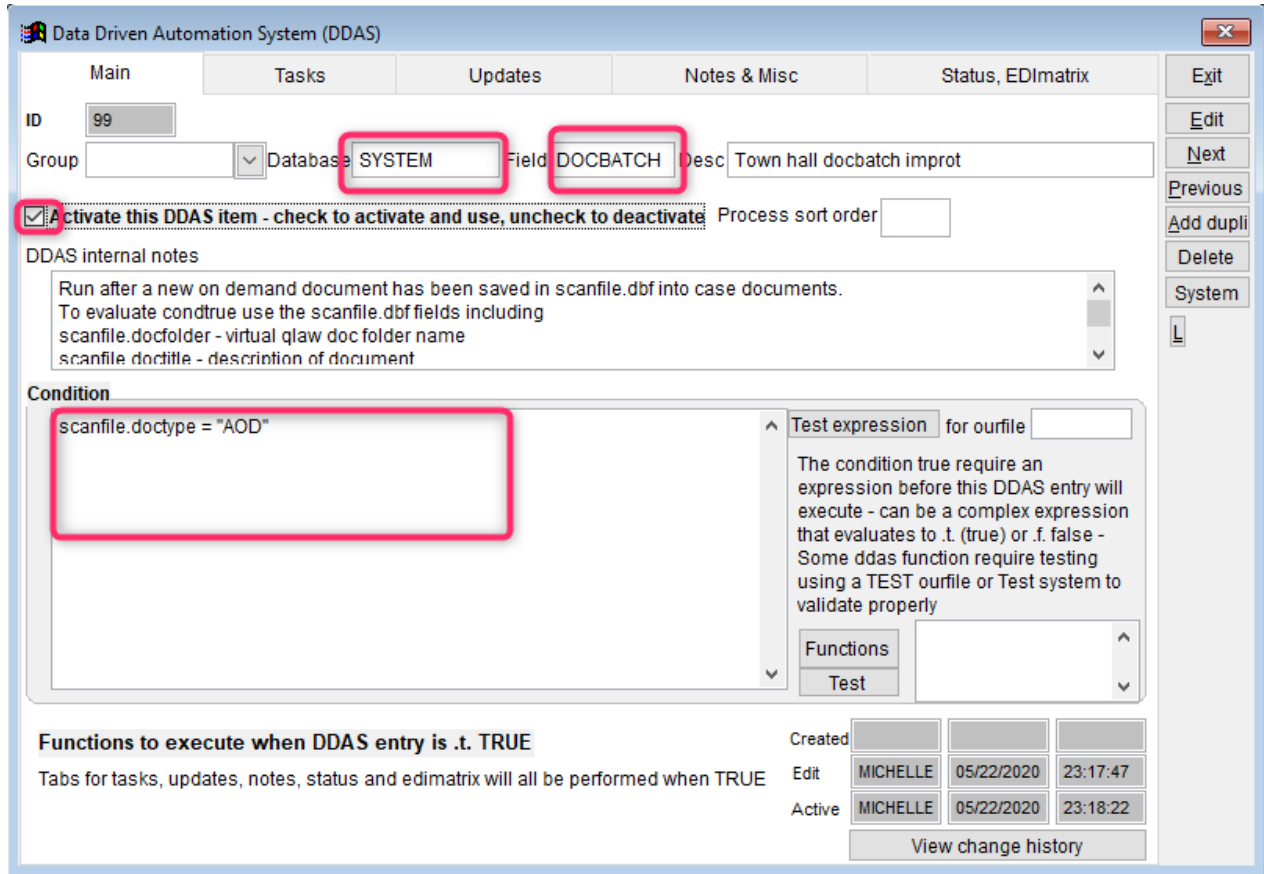
Functions to execute when DDAS entry is .t. TRUE

Tabs for tasks, updates, notes, status and edimatrix will all be performed when TRUE

Created			
Edit	MICHELLE	05/22/2020	23:14:22
Active	MICHELLE	05/22/2020	23:15:21

View change history

2. **SYSTEM.DOCBATCH** – This is used when the document is being imported into the account files using the document batch import process. You will typically use the DocID in the condition statement again in this example.



Data Driven Automation System (DDAS)

Main | Tasks | Updates | Notes & Misc | Status, EDImatrix

ID: 99

Group: [] Database: **SYSTEM** Field: **DOCBATCH** Desc: Town hall docbatch improt

Activate this DDAS item - check to activate and use, uncheck to deactivate Process sort order: []

DDAS internal notes

Run after a new on demand document has been saved in scanfile.dbf into case documents.
 To evaluate condtrue use the scanfile.dbf fields including
 scanfile.docfolder - virtual qlaw doc folder name
 scanfile.doctype - description of document

Condition

scanfile.doctype = "AOD"

Test expression for ourfile []

The condition true require an expression before this DDAS entry will execute - can be a complex expression that evaluates to .t. (true) or .f. false - Some ddas function require testing using a TEST ourfile or Test system to validate property

Functions to execute when DDAS entry is .t. TRUE

Tabs for tasks, updates, notes, status and edimatrix will all be performed when TRUE

Created	[]	[]	[]
Edit	MICHELLE	05/22/2020	23:17:47
Active	MICHELLE	05/22/2020	23:18:22

View change history