

Q-Law/Q-LawE Town Hall Meeting – April 29, 2020

Flat File, Vendor Import and Export

The flat file mapping functionality in Q-Law and Q-LawE [Q-Law(E)] enables users to import data files to open new case files in Q-Law(E). The data files can be in the following forms:

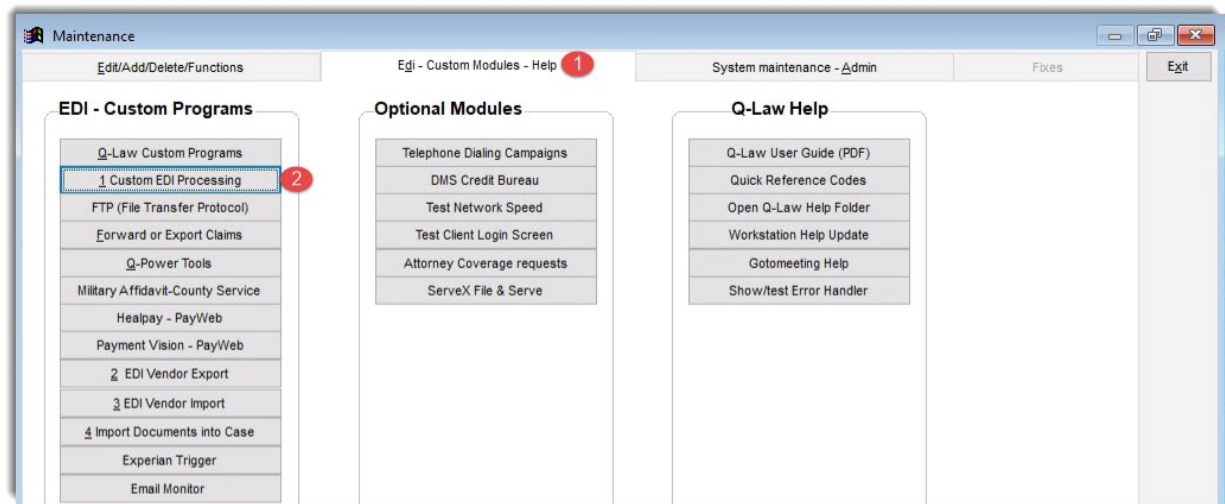
1. Standard Data Format (SDF)
2. Comma Separated Values (CSV)
3. Excel Spreadsheet (XLS or XL5)

The import files can contain a variety of data that can be mapped into specific data fields within Q-Law(E). Once this mapping of the flat file columns to Q-Law(E) fields is completed, the importing of files can be achieved by dropping the file into the specified todo folder and clicking a few buttons to complete the process.

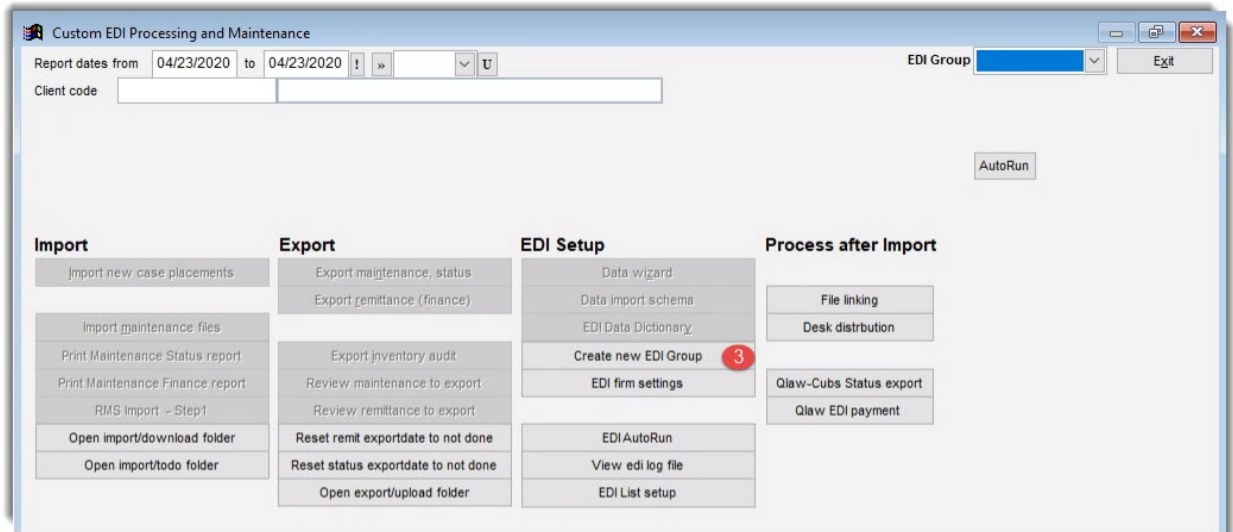
I Creating a Flat File Import

The first step in mapping the flat file fields into Q-Law(E) fields is to create an EDI Group.

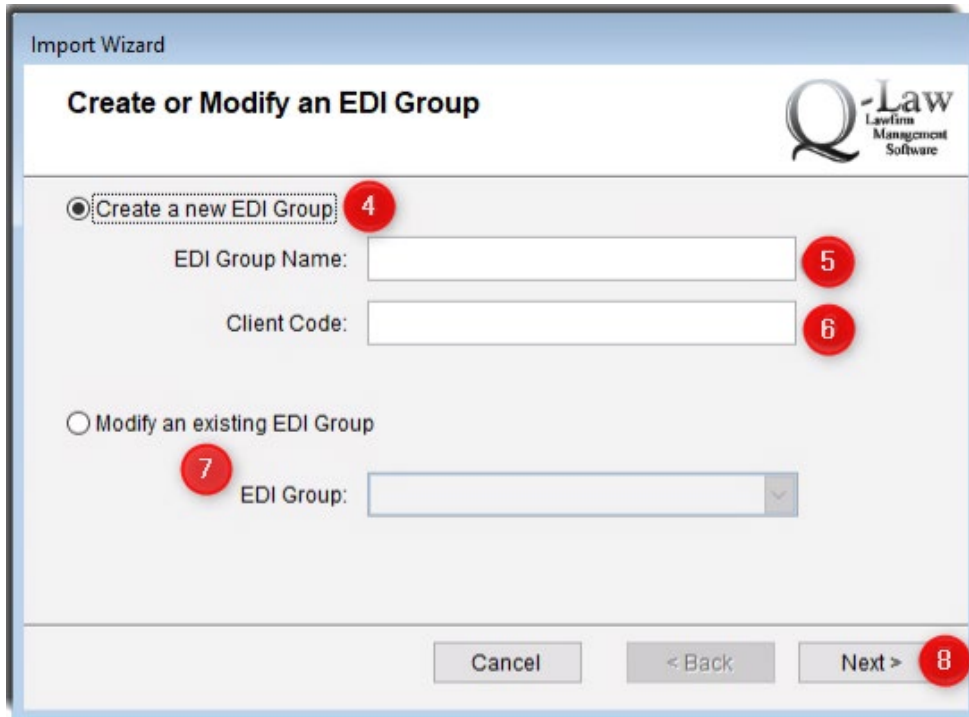
1. On the **Main** menu click [**Maintenance**]→**Edi - Custom Modules - Help** tab.
2. Click [**Custom EDI Processing**], which brings you to the **Custom EDI Processing and Maintenance** screen.



3. Click **[Create new EDI Group]**.



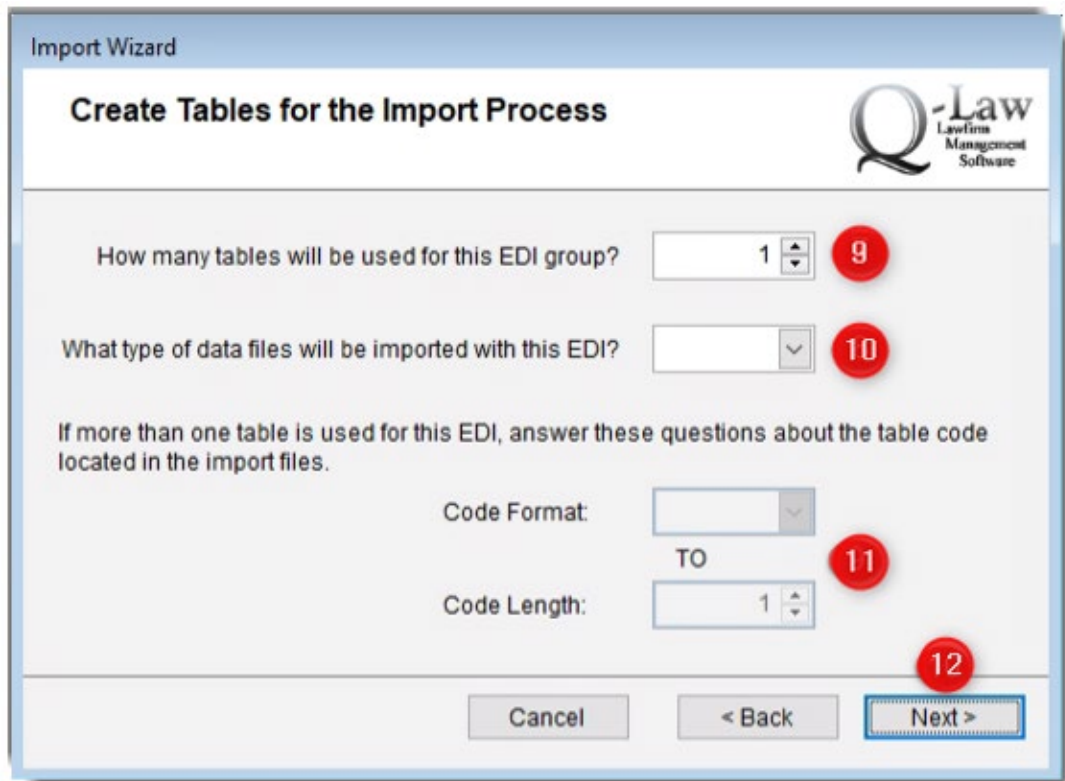
This is where a new EDI Group is created and where an existing EDI can be modified.



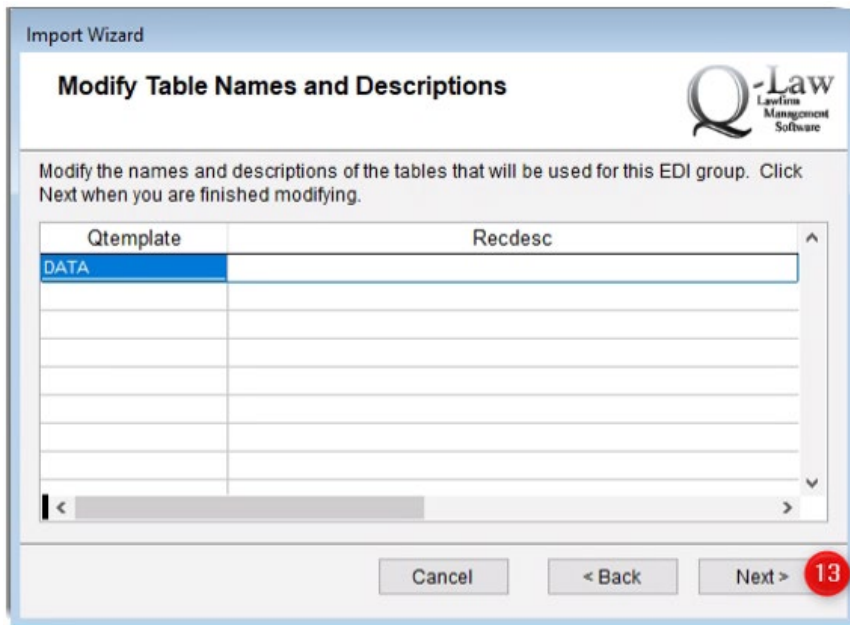
4. **Create an EDI Group** or **Modify an EDI Group** are where a new EDI is created or modified after clicking **Create a new EDI Group**.
5. Enter a name in the **EDI Group Name** field; each EDI name must be unique. Do not prefix the group name with an already-used EDI group. For example, if you have an EDI group called

TESTIMPO, do not use the word TEST as the first part of a future EDI. Also, the EDI group name can be up to 10 characters (alpha or numeric but can contain either a dash/underscore or period).

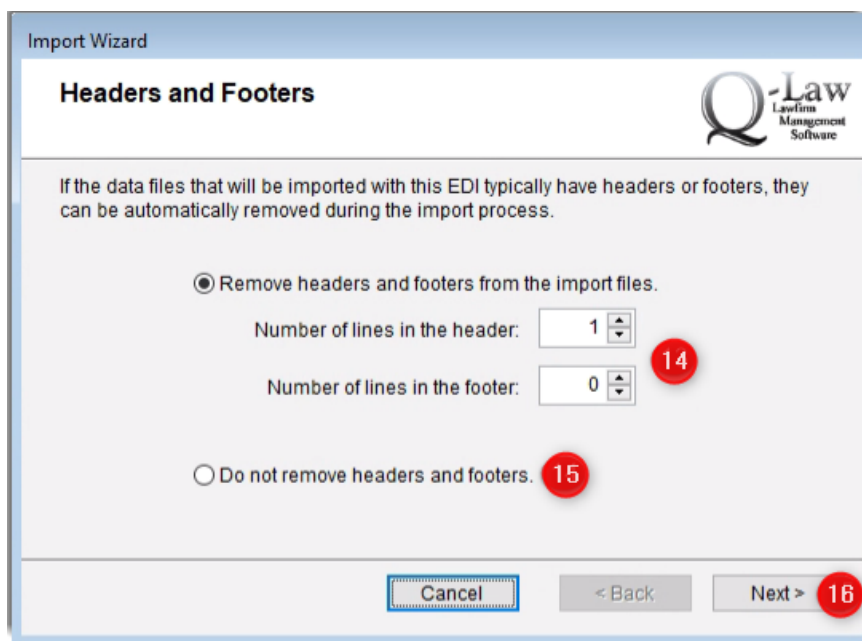
6. Enter a client code in the **Client Code** field. This is optional; enter the client code if this EDI will always be for a specific client. Click **[Next]** to view the **Import Wizard** screen.
7. If you are modifying an existing import, select the option to **Modify an existing EDI Group** and, using the dropdown list, select a master table for this EDI group. This should be the same table identified in the previous screen.
8. Once your options are selected in this screen, click **[Next]**.



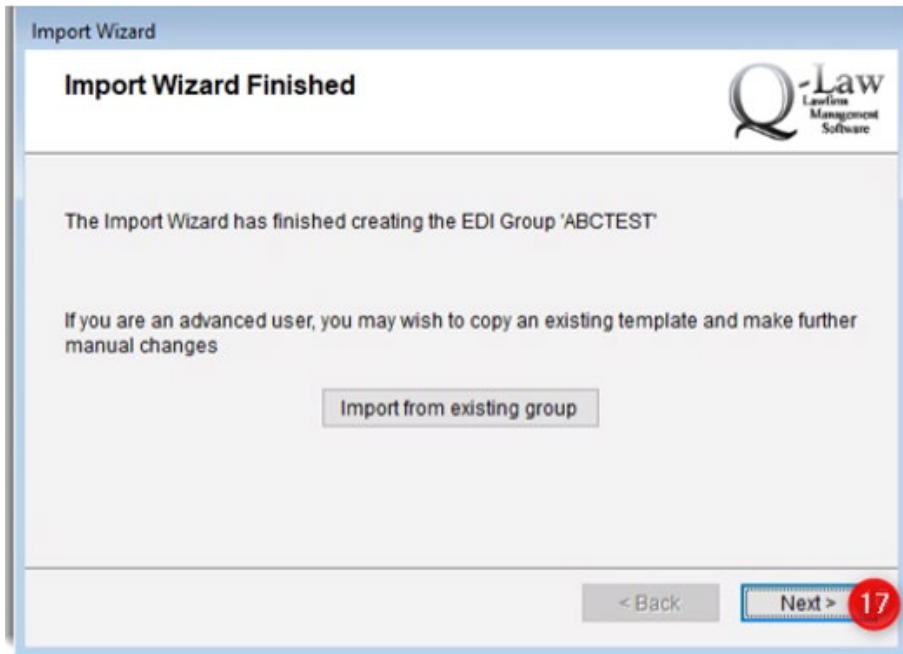
9. Enter the number of data tables for the EDI group. This number will usually be 1.
10. Select from the dropdown list the type of data file that will be used for importing. The file types are:
 - a. XLS: Excel Spreadsheet
 - b. XL5: Excel 5.0 Spreadsheet
 - c. CSV: Comma Separated Values
 - d. SDF: Standard Definition Format
11. These fields are used to create a multi-table EDI.
12. Click **[Next]** to continue to the next screen.



13. In most cases there is no update required for this screen; just click **[Next]** to view the next screen.

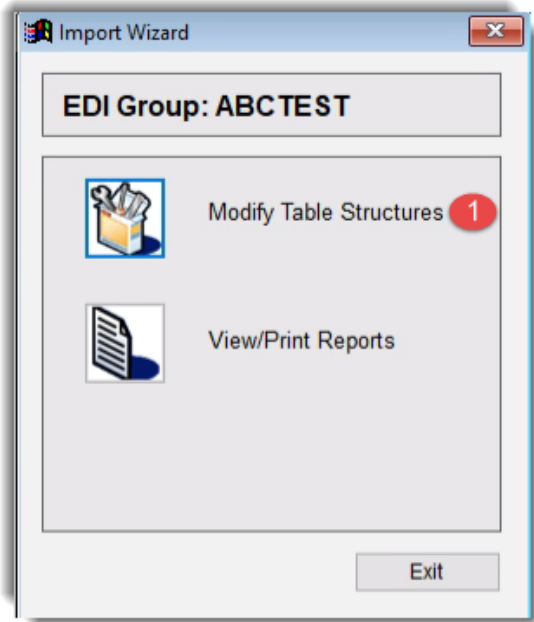


- 14. If your data file contains a header (such as column descriptions) or a footer (amount totals, for example), enter the number of rows to be removed for both the header and footer.
- 15. Click **Do not remove headers and footers** if the import file is a csv file type as the header will automatically be removed.
- 16. Click **[Next]** to view the next screen.



17. Click **[Next]** to view the next screen.

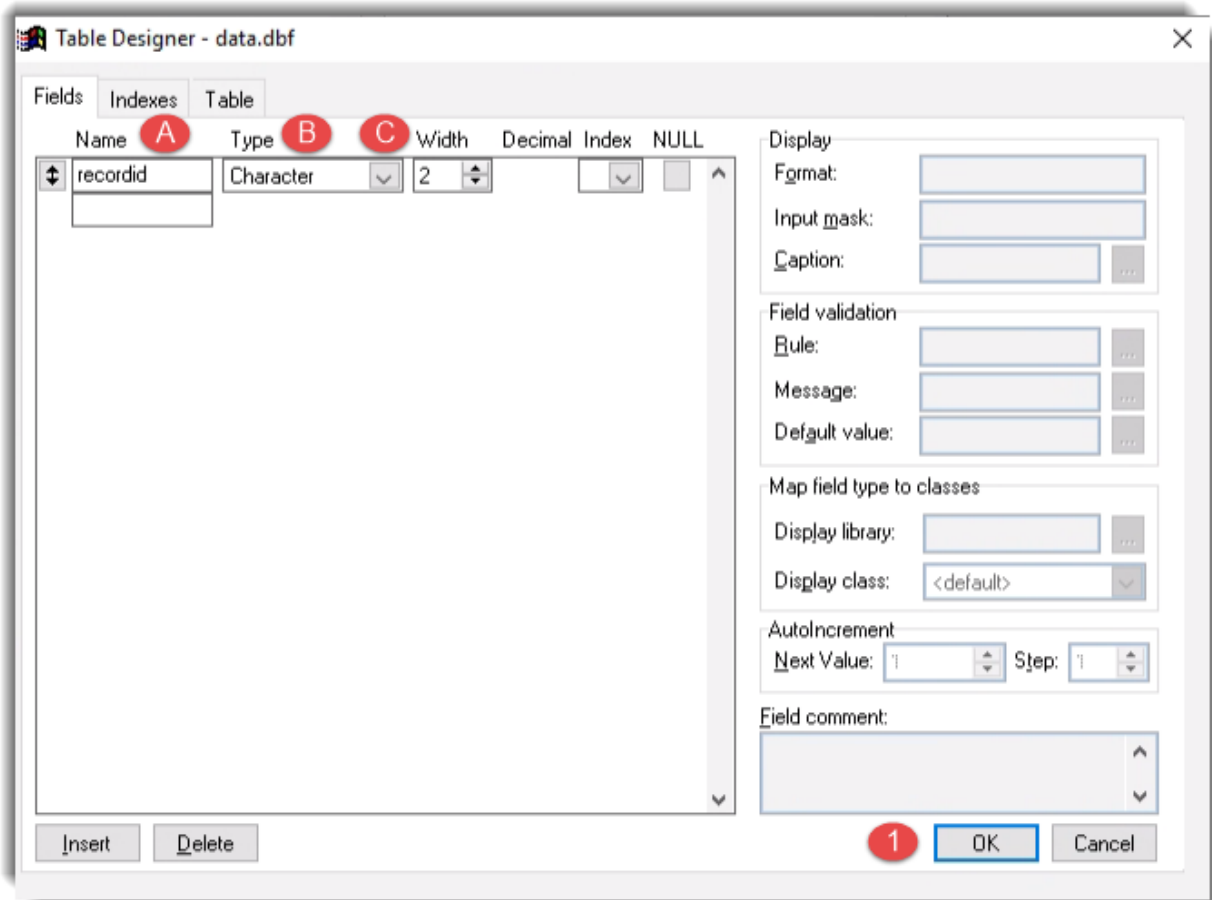
The EDI group has been created.



II Building the Data Table

After the EDI group is created, the data table must be set up. This is where Q-Law(E) temporarily places the data from the placement file during import. You will use the spreadsheet from your client to build the table. It is **very important** that the data be entered into this table in the **EXACT** order it appears in the data file/spreadsheet. Even if you do not intend on using the data, a field entry must be created. There must be a field in the temp table for every field in the spreadsheet.

1. Click [**Modify Table Structures**] from the above screenshot.



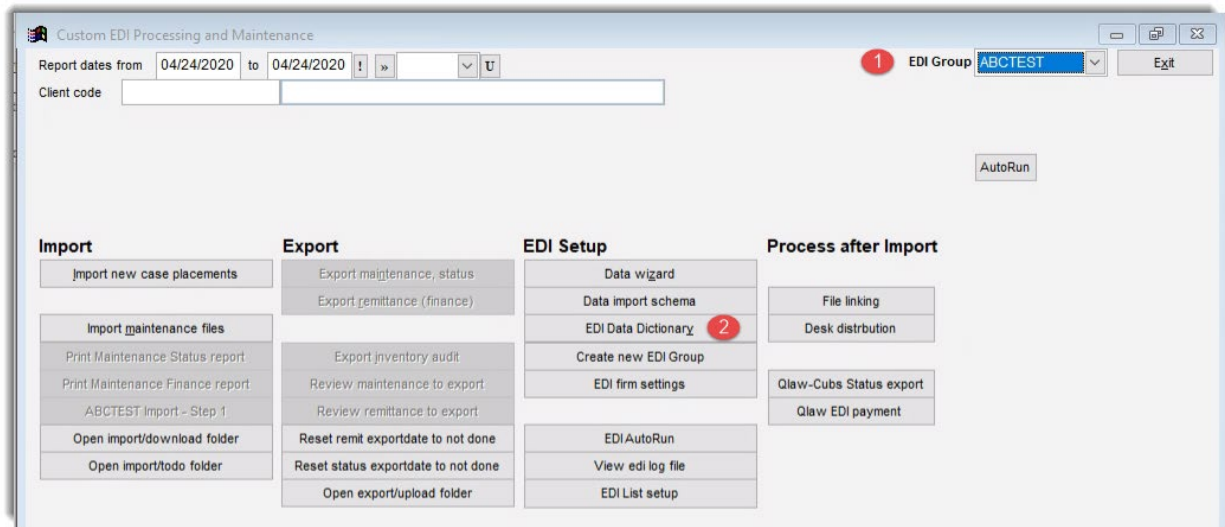
This is where you add the fields from the spreadsheet. There are three to four fields that must be addressed. There is no “save” button in this window. It is recommended to periodically click **[OK]**, then click **[Yes]** to **[Make structure changes permanent]**, and then re-enter the window.

- A. **Name** – This field is a maximum of 11 characters. The name must start with a character but can contain numbers and underscores (_). The names are also all lowercase, so typing in caps does not matter. Replace **recordid** with the first field of your spreadsheet.
- B. **Type** – This is the type of data. Below are the four most used types. It is common to mark all data fields as character fields and, when necessary, change them in the mapping of the data.
 - **Character:** This is used for most data fields that are less than 254 characters long. Account numbers, phone numbers, addresses (including zip codes), SSN, driver’s license, names, etc.
 - **Numeric:** These are used mostly for amounts and percentages. When selected, you will also be given a decimal field (explained below).
 - **Date:** Used for dates. If you have fields in the spreadsheet that are Date/Time, you will have to convert the fields in the spreadsheet to date fields as Q-Law(E) does not support them.

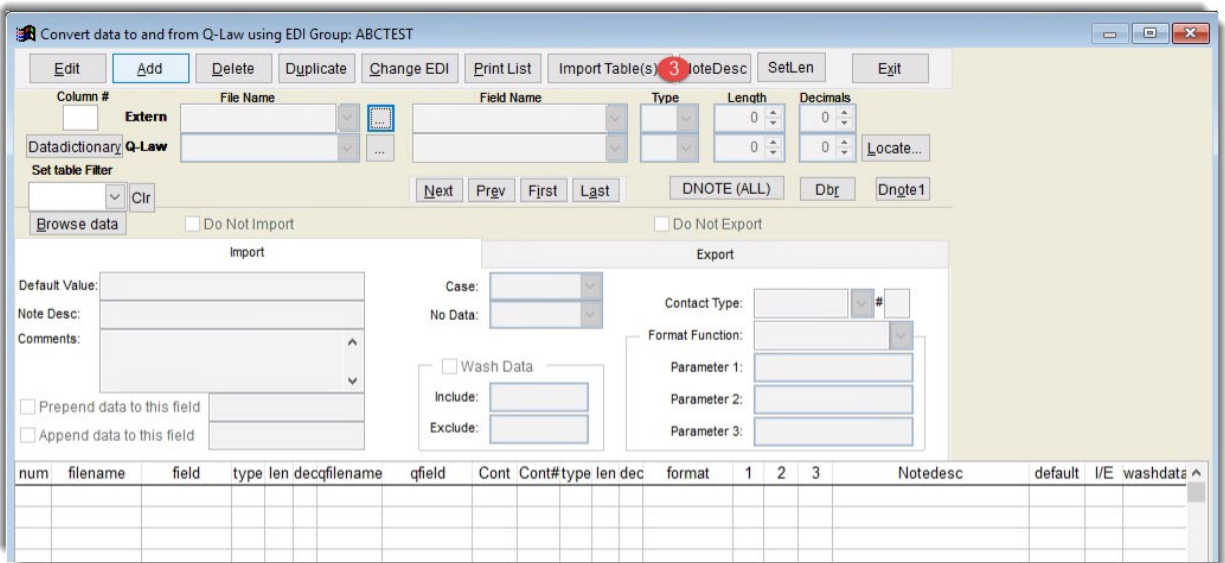
- **Memo:** These are used to store notes or any data that is more than 254 characters. It is not recommended to set any critical data fields (address, names, account numbers, etc). Memo fields should primarily be used for notes and comments.
- C. **Width** – Depending on the type of field, different options may appear here. Characters will have a single field in which a maximum of 254 can be entered. Numeric will have two fields, one for the main length and a second for the number of decimal places. Dates and Memo fields are fixed length. When setting the length for character fields, it is OK to “high-ball” the length. It is safer to go over than to be short and risk data being lost. For amounts, we recommend 15.2 as the length.
1. Once you have entered all the fields, click **[OK]**, commit the changes, and then **[Exit]** back to the **Custom EDI Processing and Maintenance** screen.

III Creating the Data Dictionary

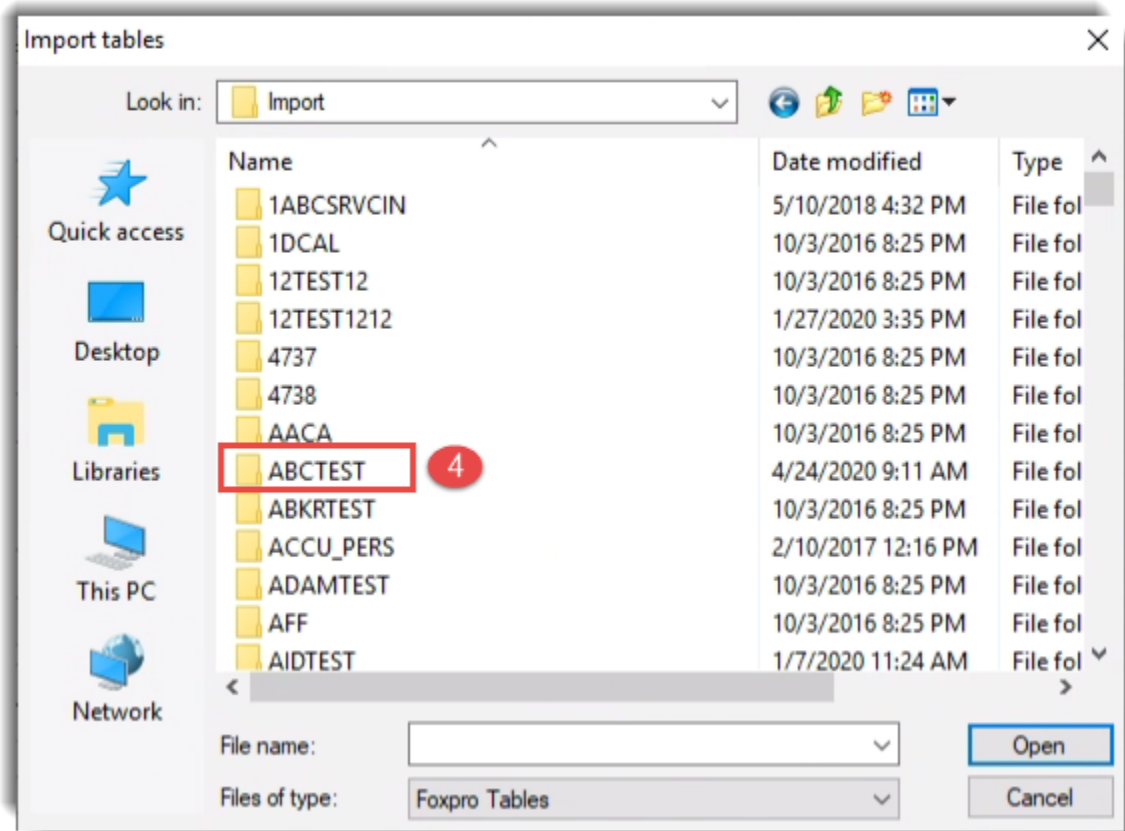
Once the EDI group and the temp table are created, the next step is to identify and define each column of data in the flat file that will be imported. This is telling Q-Law(E) what type of data is included on the file and where to put that data within Q-Law(E).



1. To access the data dictionary, first select the EDI Group from the **EDI Group** dropdown in the upper right corner.
2. Click **[Create new EDI Group]**.

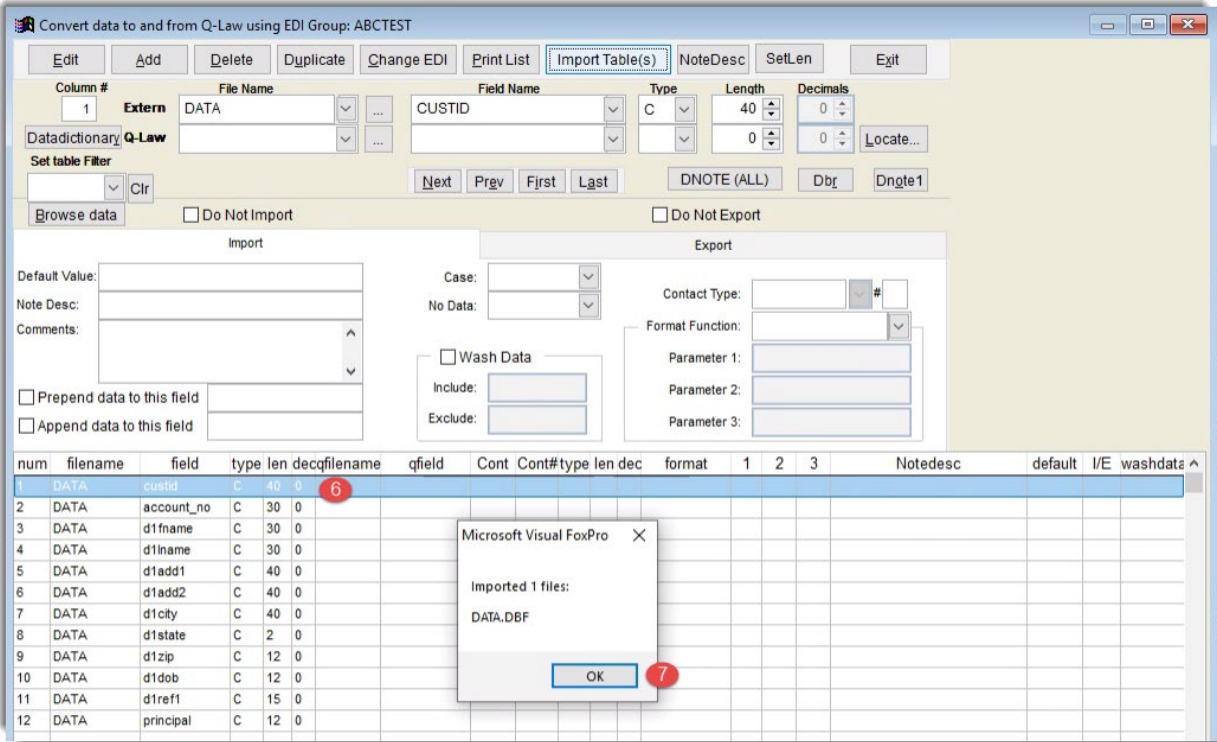


3. Click **[Import Table(s)]** to import the temporary table that was created above.



4. Browse to \Q-Law(E)\import\ABCTEST (ABCTEST = the name of the EDI group given above).

5. Locate and double-click on the file named DATA.DBF.



Convert data to and from Q-Law using EDI Group: ABCTEST

Buttons: Edit, Add, Delete, Duplicate, Change EDI, Print List, **Import Table(s)**, NoteDesc, SetLen, Exit

Column # 1, Extern, File Name: DATA, Field Name: CUSTID, Type: C, Length: 40, Decimals: 0

Datadictionary: Q-Law, Set table Filter: [] Clr

Buttons: Next, Prev, Fjrst, Last, DNOTE (ALL), Dbr, Dngte1

Buttons: Browse data, Do Not Import, Do Not Export

Default Value: [], Note Desc: [], Comments: []

Buttons: Prepend data to this field, Append data to this field, Wash Data, Include: [], Exclude: [], Contact Type: [], Format Function: [], Parameter 1: [], Parameter 2: [], Parameter 3: []

num	filename	field	type	len	dec	qfilename	qfield	Cont	Cont#	type	len	dec	format	1	2	3	Notedesc	default	I/E	washdata	
1	DATA	custid	C	40	0																
2	DATA	account_no	C	30	0																
3	DATA	d1fname	C	30	0																
4	DATA	d1lname	C	30	0																
5	DATA	d1add1	C	40	0																
6	DATA	d1add2	C	40	0																
7	DATA	d1city	C	40	0																
8	DATA	d1state	C	2	0																
9	DATA	d1zip	C	12	0																
10	DATA	d1dob	C	12	0																
11	DATA	d1ref1	C	15	0																
12	DATA	principal	C	12	0																

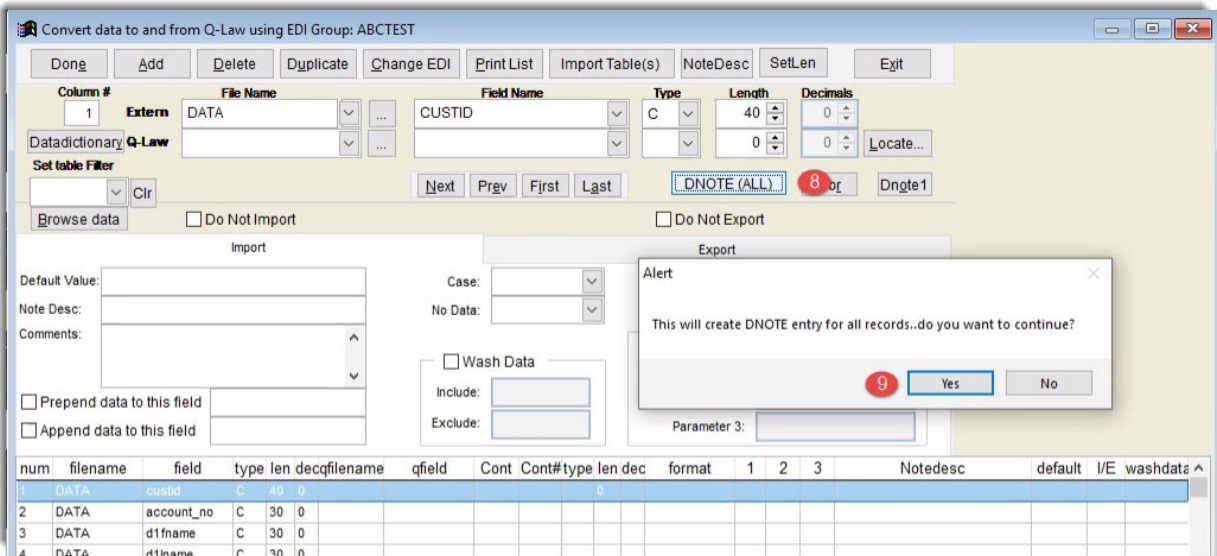
Microsoft Visual FoxPro

Imported 1 files:
DATA.DBF

OK

6. The fields added into the data table will now be imported on the lower portion of the screen.

7. Click [OK].



Convert data to and from Q-Law using EDI Group: ABCTEST

Buttons: Done, Add, Delete, Duplicate, Change EDI, Print List, Import Table(s), NoteDesc, SetLen, Exit

Column # 1, Extern, File Name: DATA, Field Name: CUSTID, Type: C, Length: 40, Decimals: 0

Datadictionary: Q-Law, Set table Filter: [] Clr

Buttons: Next, Prev, Fjrst, Last, **DNOTE (ALL)**, Dbr, Dngte1

Buttons: Browse data, Do Not Import, Do Not Export

Default Value: [], Note Desc: [], Comments: []

Buttons: Prepend data to this field, Append data to this field, Wash Data, Include: [], Exclude: [], Contact Type: [], Format Function: [], Parameter 1: [], Parameter 2: [], Parameter 3: []

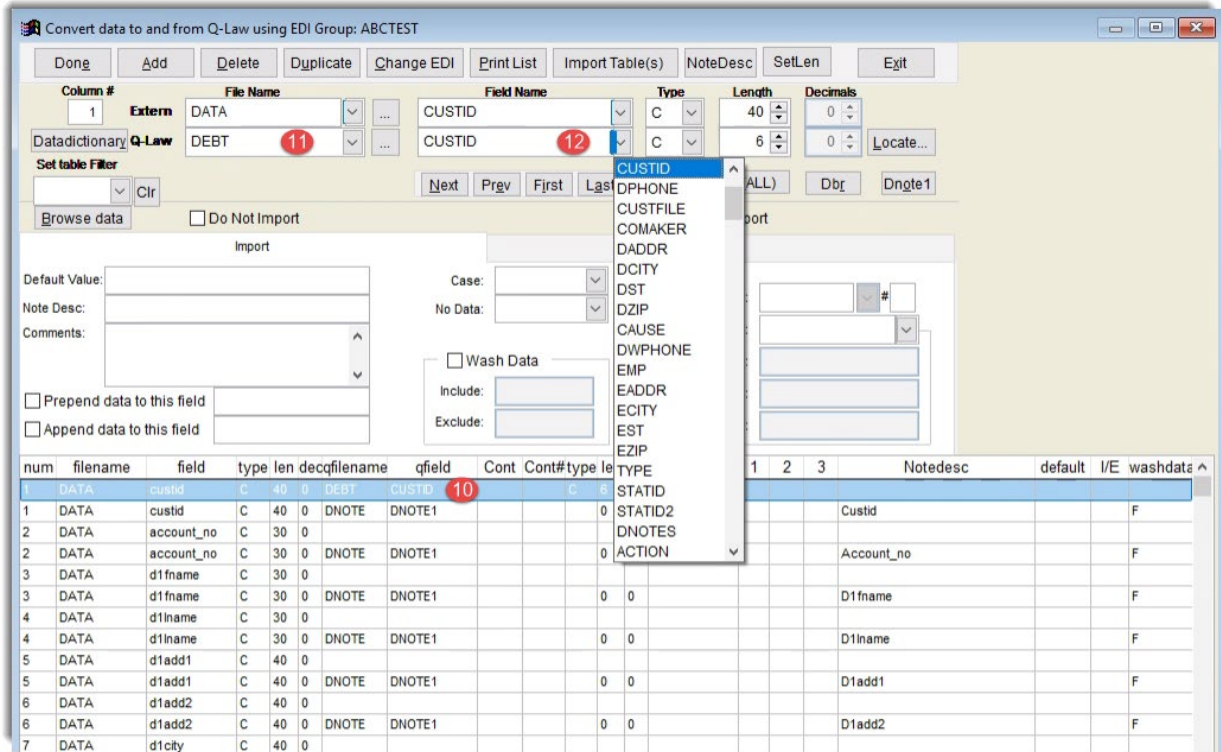
num	filename	field	type	len	dec	qfilename	qfield	Cont	Cont#	type	len	dec	format	1	2	3	Notedesc	default	I/E	washdata	
1	DATA	custid	C	40	0																
2	DATA	account_no	C	30	0																
3	DATA	d1fname	C	30	0																
4	DATA	d1lname	C	30	0																

Alert

This will create DNOTE entry for all records..do you want to continue?

Yes No

8. Do you want a note line for note history showing headers and what was imported? If so, click [DNOTE (ALL)].
9. Click [Yes] to add one note for all information to be mapped to a DNOTE line into DNOTE field.



num	filename	field	type	len	decq	filename	qfield	Cont	Cont#	type	le
1	DATA	custid	C	40	0	DEBT	CUSTID				
2	DATA	account_no	C	30	0	DNOTE	DNOTE1				
2	DATA	account_no	C	30	0	DNOTE	DNOTE1				
3	DATA	d1fname	C	30	0	DNOTE	DNOTE1				
3	DATA	d1fname	C	30	0	DNOTE	DNOTE1		0	0	
4	DATA	d1lname	C	30	0	DNOTE	DNOTE1				
4	DATA	d1lname	C	30	0	DNOTE	DNOTE1		0	0	
5	DATA	d1add1	C	40	0	DNOTE	DNOTE1				
5	DATA	d1add1	C	40	0	DNOTE	DNOTE1		0	0	
6	DATA	d1add2	C	40	0	DNOTE	DNOTE1				
6	DATA	d1add2	C	40	0	DNOTE	DNOTE1		0	0	
7	DATA	d1city	C	40	0	DNOTE	DNOTE1				

10. Next associate each temporary table field with a Q-Law(E) field by highlighting each row one at a time.
11. In the Q-Law(E) **File Name** at the top of the screen, enter the Q-Law(E) file name.
12. In the Q-Law(E) **Field Name** at the top of the screen, enter the Q-Law(E) field name. This field must be selected from the dropdown.

Convert data to and from Q-Law using EDI Group: ABCTEST

Done Add Delete Duplicate Change EDI Print List Import Table(s) NoteDesc SetLen Exit

Column # 3 Extern File Name DATA Field Name D1FNAME Type C Length 30 Decimals 0

Datadictionary Q-Law DNAME FNAME Type C Length 20 Decimals 0 Locate...

Set table Filter Clr Next Prev First Last DNOTE (ALL) Dbr Dngte1

Browse data Do Not Import Do Not Export

Default Value: Note Desc: Comments: Prepend data to this field Append data to this field

Case: No Data: Wash Data Include: Exclude:

Contact Type: DEB # 1 13

Format Function: Parameter 1: Parameter 2: Parameter 3:

num	filename	field	type	len	dec	filename	qfield	Cont	Cont#	type	len	dec	format	1	2	3	Notedesc	default	I/E	washdata
2	DATA	account_no	C	30	0	DNOTE	DNOTE1				0	0					Account_no			F
3	DATA	d1fname	C	30	0	DNAME	FNAME	DEB	1	C	30	0								F
4	DATA	d1lname	C	30	0	DNAME	LNAME	DEB	1	C	30	0								F
5	DATA	d1lname	C	30	0	DNOTE	DNOTE1				0	0					D1lname			F
6	DATA	d1add1	C	40	0	DNAME	ADD1	DEB	1	C	40	0								F
7	DATA	d1add1	C	40	0	DNOTE	DNOTE1				0	0					D1add1			F
8	DATA	d1add2	C	40	0	DNAME	ADD2	DEB	1	C	40	0								F
9	DATA	d1add2	C	40	0	DNOTE	DNOTE1				0	0					D1add2			F
10	DATA	d1city	C	40	0	DNAME	CITY	DEB	1	C	40	0								F
11	DATA	d1city	C	40	0	DNOTE	DNOTE1				0	0					D1city			F
12	DATA	d1state	C	2	0	DNAME	STATE	DEB	1	C	2	0								F
13	DATA	d1state	C	2	0	DNOTE	DNOTE1				0	0					D1state			F
14	DATA	d1zip	C	12	0	DNAME	ZIP	DEB	1	C	10	0								F
15	DATA	d1zip	C	12	0	DNOTE	DNOTE1				0	0					D1zip			F
16	DATA	d1dob	C	12	0	DNAME	DATE	DEB	1	D	8	0	MMDDYYYY							F
17	DATA	d1dob	C	12	0	DNOTE	DNOTE1				0	0					D1dob			F
18	DATA	d1ref1	C	15	0	DNAME	REF1	DEB	1	C	12	0	GSSN							F
19	DATA	d1ref1	C	15	0	DNOTE	DNOTE1				0	0					D1ref1			F

13. **Contact Type** dropdown is used to indicate what contact to update if the field is for the DNAME database. Use the dropdown to select the contact type and the contact #.
14. The **Format Function** dropdown converts data to specific formats, e.g., MMDDYYYY converts the DOB to 05/22/1966.
15. The **Format Function GSSN** converts the data in the spreadsheet, 125131255, to 125-13-1255 in the ref1 field.

Convert data to and from Q-Law using EDI Group: ABCTEST

Done Add Delete Duplicate Change EDI Print List Import Table(s) NoteDesc SetLen Exit

Column # 2 Extern File Name 3 DATA Field Name 4 D1REF1 Type 5 Length 6 Decimals 7

1 11 Q-Law 8 NAME 9 REF1 10 REF1 C 11 12 12 0 13 cate...

Set table Filter 14

Next Prev First Last DNOTE (ALL) Dbt Dngte1

Browse data Do Not Import 15 Do Not Export 16

Import Export

Default Value: Case: f No Data: g Contact Type: DEB i # 1 j

Note Desc: b Format Function: GSSN k

Comments: c Include: i Exclude: ii

Prepend data to this field d Append data to this field e

Wash Data h

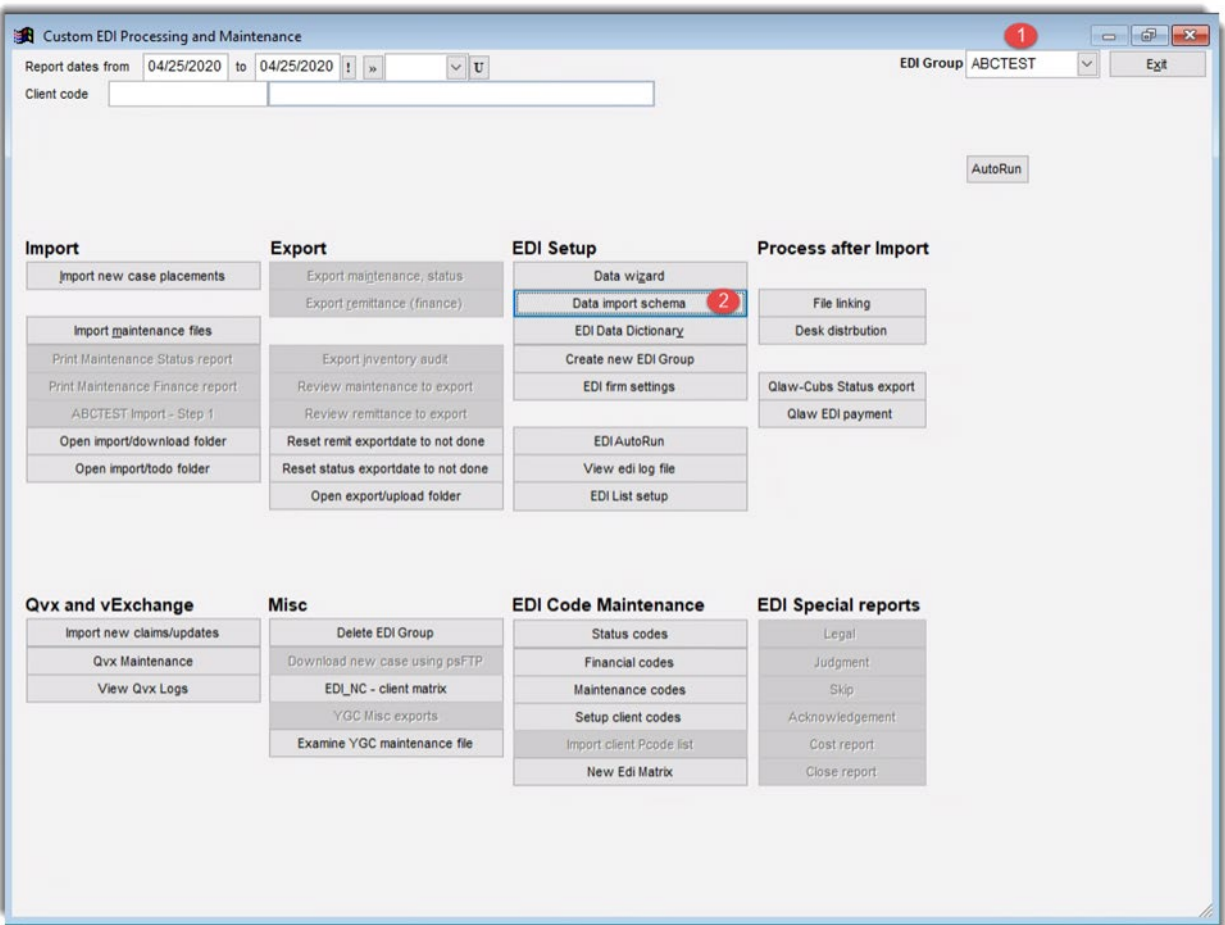
Parameter 1: Parameter 2: Parameter 3:

num	filename	field	type	len	dec	qfilename	qfield	Cont	Cont#	type	len	dec	format	1	2	3	Notedesc	default	I/E	washdata
2	DATA	account_no	C	30	0	DNOTE	DNOTE1				0	0					Account_no			F
3	DATA	d1fname	C	30	0	DNAME	FNAME	DEB	1	C	20						D1fname			F
3	DATA	d1fname	C	30	0	DNOTE	DNOTE1				0	0					D1fname			F
4	DATA	d1lname	C	30	0	DNAME	LNAME	DEB	1	C	30						D1lname			F
4	DATA	d1lname	C	30	0	DNOTE	DNOTE1				0	0					D1lname			F
5	DATA	d1add1	C	40	0	DNAME	ADD1	DEB	1	C	40						D1add1			F
5	DATA	d1add1	C	40	0	DNOTE	DNOTE1				0	0					D1add1			F
6	DATA	d1add2	C	40	0	DNAME	ADD2	DEB	1	C	40						D1add2			F
6	DATA	d1add2	C	40	0	DNOTE	DNOTE1				0	0					D1add2			F
7	DATA	d1city	C	40	0	DNAME	CITY	DEB	1	C	40						D1city			F
7	DATA	d1city	C	40	0	DNOTE	DNOTE1				0	0					D1city			F
8	DATA	d1state	C	2	0	DNAME	STATE	DEB	1	C	2						D1state			F
8	DATA	d1state	C	2	0	DNOTE	DNOTE1				0	0					D1state			F
9	DATA	d1zip	C	12	0	DNAME	ZIP	DEB	1	C	10						D1zip			F
9	DATA	d1zip	C	12	0	DNOTE	DNOTE1				0	0					D1zip			F
10	DATA	d1dob	C	12	0	DNAME	DATE	DEB	1	D	8		MMDDYYYY				D1dob			F
10	DATA	d1dob	C	12	0	DNOTE	DNOTE1				0	0					D1dob			F
11	DATA	d1ref1	C	15	0	DNAME	REF1	DEB	1	C	12		GSSN				D1ref1			F
11	DATA	d1ref1	C	15	0	DNOTE	DNOTE1				0	0					D1ref1			F

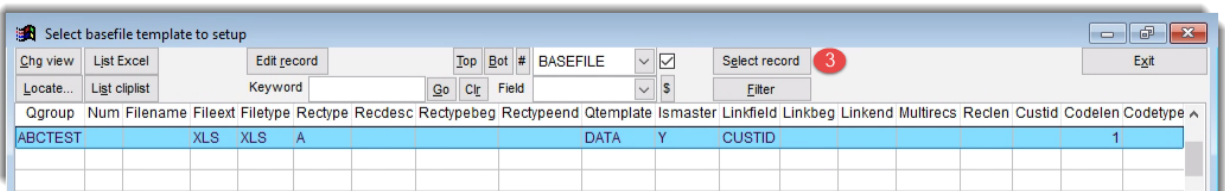
- Column #** – The column number in the flat file.
- Extern** fields – Data relating to the flat file.
- File Name** – The name of the import database that was defined when the EDI group was created.
- Field Name** – The title that appears in the header row. If there is no header row, any field name that describes the data can be entered here.
- Type** – Use the dropdown list to select a field type such as character, numeric, date, etc.
- Length** – Indicate the maximum character length of the field.
- Decimals** – If the field is a numeric field, indicate the number of decimal points.
- Q-Law(E) fields** – Data relating to Q-Law(E).
- File Name** – The database name.
- Field Name** – The field name from within the database.
- Type** – This field will automatically populate with the correct type.
- Length** – This field will automatically populate with the correct length.
- Decimals** – This field will automatically populate with the correct number of decimals.
- Set table Filter** – Allows you to select the import file and view the contents.



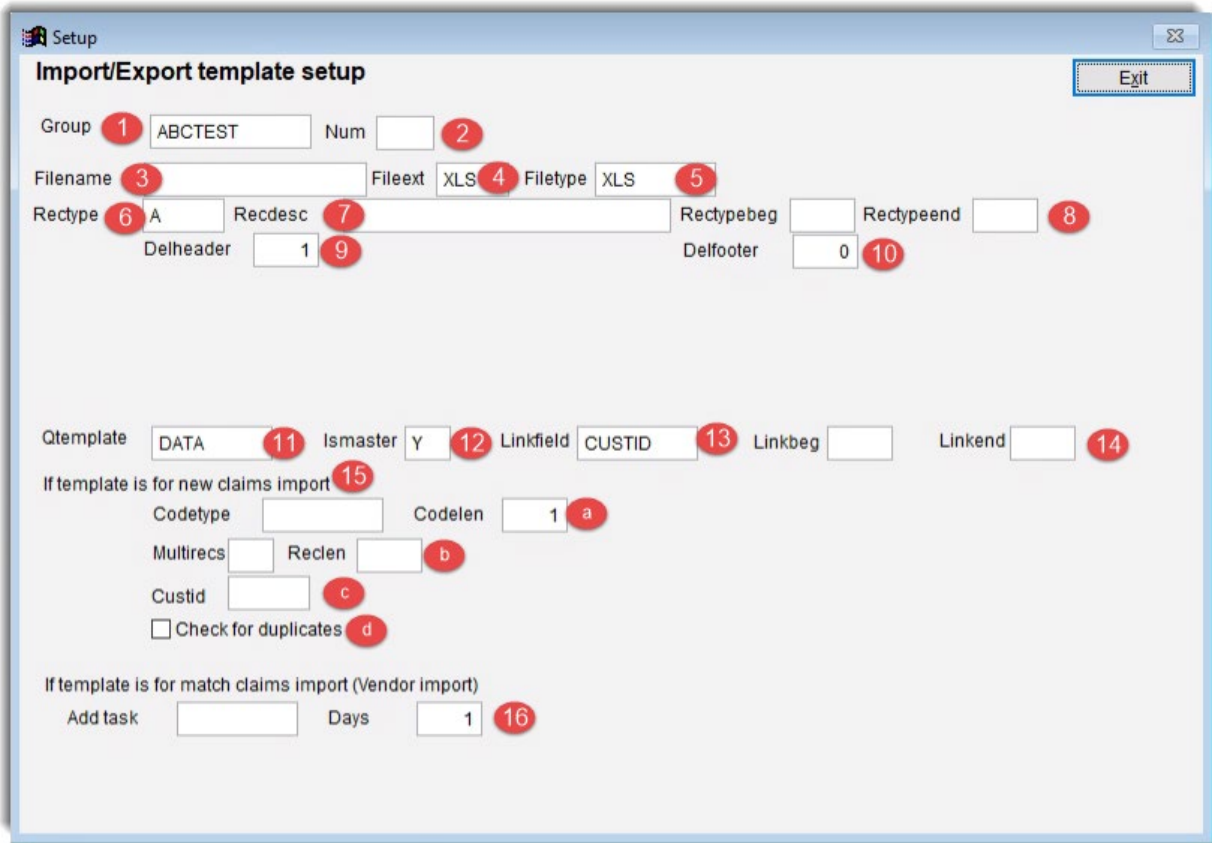
15. **Do Not Import** – Indicates this EDI group is not used for importing.
16. **Do Not Export** – Indicates this EDI group is not used for exporting.
17. **Import** – Data specific to importing:
 - a. **Default Value** – Enter a default value for this field if the import data is blank.
 - b. **Note Desc** – Enter a description of the data if the format data is for a note. This description will precede the data in the note created on import if added to “DNOTE1” by clicking the designated button.
 - c. **Comments** – Enter any comments for this EDI group.
 - d. **Prepend data to this field** – If checked, the data in the field to the right will be prepended to the “Extern” (from the top of the screen) fields data before it is moved to its Q-Law(E) field.
 - e. **Append data to this field** – If checked, the data in the field to the right will be appended to the “Extern” (from the top of the screen) fields data before it is moved to its Q-Law(E) field.
 - f. **Case** – Use the dropdown to indicate the text case type, such as upper or lower case.
 - g. **No Data** – Use the dropdown to indicate what will be input into Q-Law(E) if there is no data to input.
 - h. **Wash Data** – Remove data from a field:
 - i. **Include**: Indicate any characters to be removed.
 - ii. **Exclude**: Indicate any characters that will remain.
 - i. **Contact Type** - Use the dropdown to indicate what contact to update if the field is for the DNAME database.
 - j. **#** - Indicate the debtor number.
 - k. **Format Function** - Use the dropdown to indicate the format function.
 - l. **Parameter 1-3** - If the formula requires parameters, enter up to three parameters.
18. Once the data is complete for the first row, repeat step 5 for all rows.
19. When all data has been mapped, **[Exit]** to the **Main** menu.



1. Click the **EDI group** dropdown to select the EDI.
2. Click **[Data import schema]**.



3. Click **[Select record]** to view the Import/Export template setup.



The screenshot shows a 'Setup' window titled 'Import/Export template setup'. It contains the following fields and callouts:

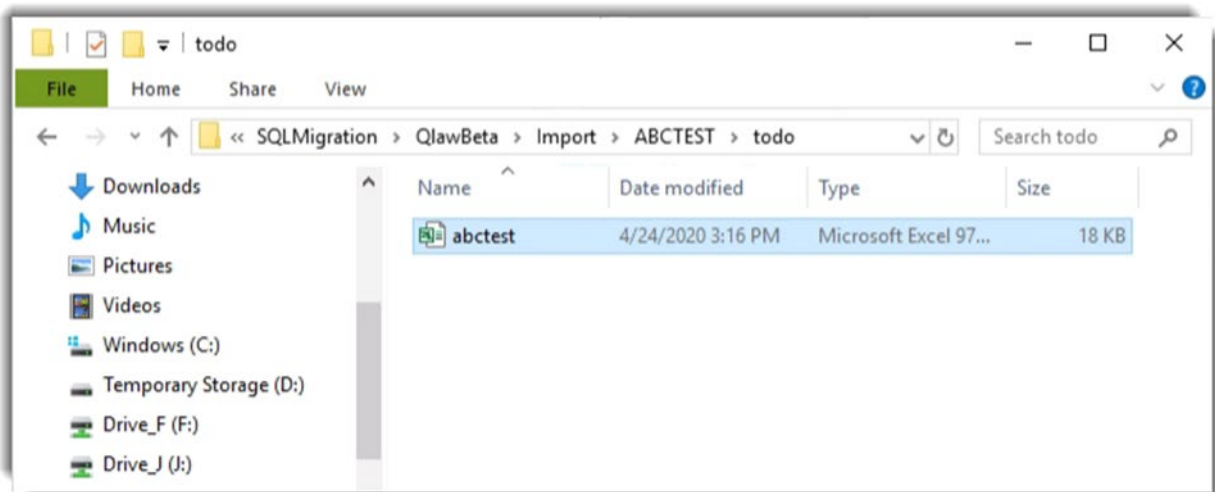
- 1**: Group (text box with 'ABCTEST')
- 2**: Num (text box)
- 3**: Filename (text box)
- 4**: Fileext (text box with 'XLS')
- 5**: Filetype (text box with 'XLS')
- 6**: Rectype (text box with 'A')
- 7**: Recdesc (text box)
- 8**: Rectypebeg (text box)
- 8**: Rectypeend (text box)
- 9**: Delheader (text box with '1')
- 10**: Delfooter (text box with '0')
- 11**: Qtemplate (text box with 'DATA')
- 12**: Ismaster (text box with 'Y')
- 13**: Linkfield (text box with 'CUSTID')
- 14**: Linkbeg (text box)
- 14**: Linkend (text box)
- 15**: If template is for new claims import (checkbox)
- a**: Codelen (text box with '1')
- b**: Reclen (text box)
- c**: Custid (text box)
- d**: Check for duplicates (checkbox)
- 16**: Days (text box with '1')

1. **Group** – Name of the import is automatically added.
2. **Num** – Set if part of a set.
3. **Filename** – If using a set file name for the import, enter it here without the extension; otherwise leave this field blank.
4. **Fileext** – Enter the file extension here, e.g., TXT, XLS, CSV, SDF.
5. **Filetype** – Enter the file type, e.g., TXT, XLS, XLT, SDF, CSV, TAB, DEL.
6. **Rectype** – Added automatically.
7. **Recdesc** – Descriptive name for this import or name of data file for multi-file imports.
8. **Rectypebeg** and **rectypeend** – not normally used when building a basic import.
9. **Delheader** – Note how many records of header files to delete.
10. **Delfooter** – Note how many records for footer files to delete.
11. **Qtemplate** – Automatically added.
12. **Ismaster** – Required to be Y for all imports except for secondary files for multclaim new file import.
13. **Linkfield** – If importing new claims for multiple clients and you have a field in your table named CUSTID, then put CUSTID in this field or leave blank.

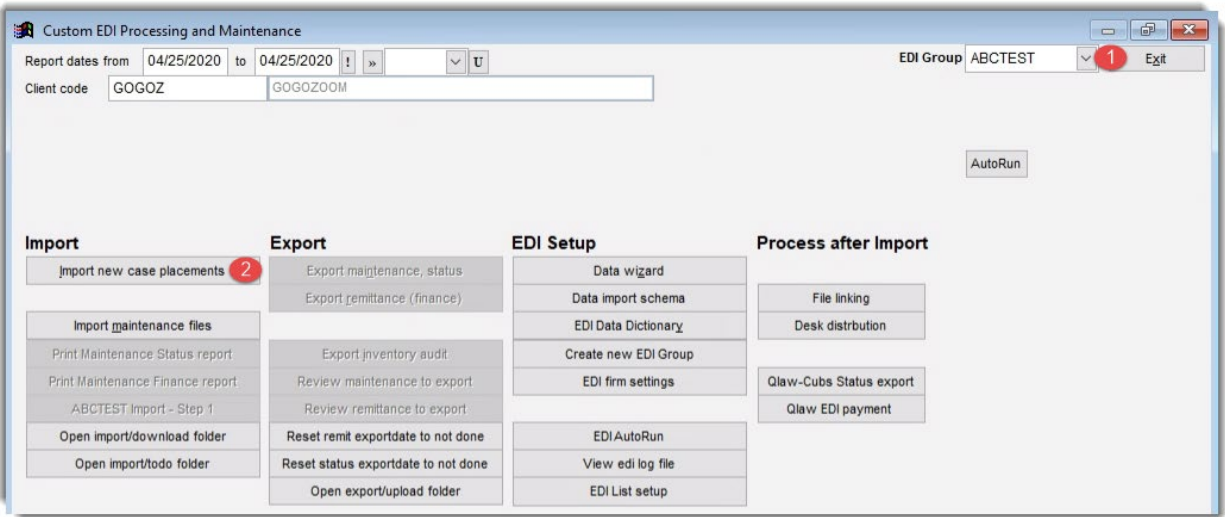
14. **Linkbeg and Linkend** – use only if instructed.
15. **If template is for new claims import:**
 - a. **Codetype and codelen** – leave as set.
 - b. **Multirecs and Reclen** – use only if instructed.
 - c. **Custid** – Enter a client code to import new claims to. This can be changed by the user before importing.
 - d. **Check for duplicates** – When checked, this field looks for duplicates when importing new claims.
16. **If template is for match claims import (Vendor import) – Add task** and the number of **Days** in boxes.

IV Import a File

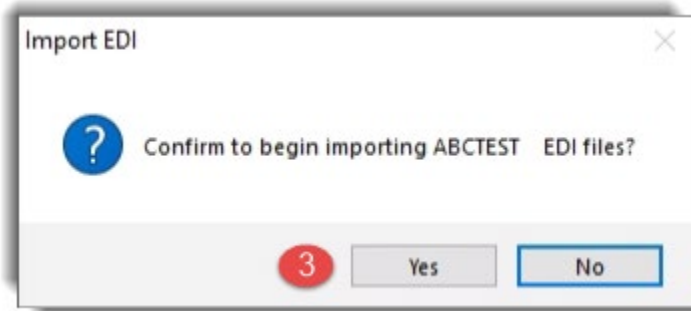
Once the EDI group is created and the data dictionary is defined, the next step is to move the import file to the Q-Law(E)/import/EDI group name/todo folder.



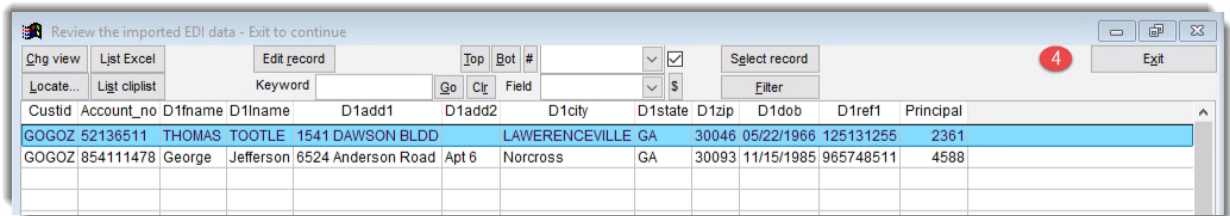
Once the file is in the todo folder, you are ready to import the new files into Q-Law(E). On the **Main** menu click **[Maintenance]→Edi - Custom Modules - Help** tab→**[Custom EDI Processing]**, which brings you to the **Custom EDI Processing and Maintenance** screen.



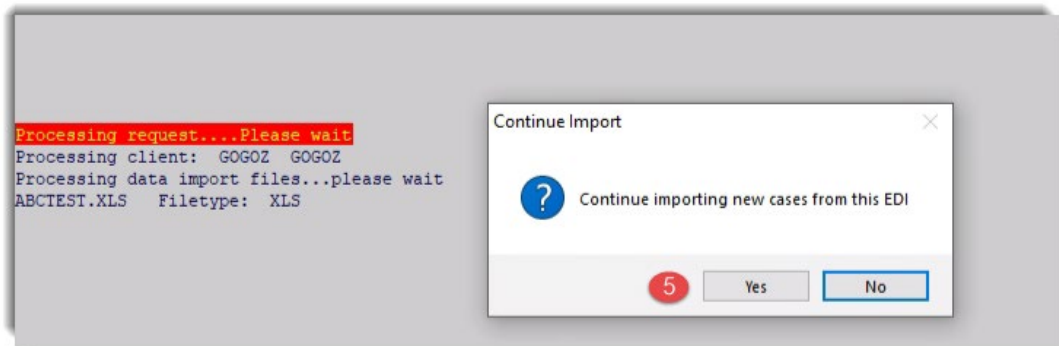
1. From the **Custom EDI Processing and Maintenance** screen, select the group from the **EDI Group** dropdown.
2. Click **[Import new case placements]**.



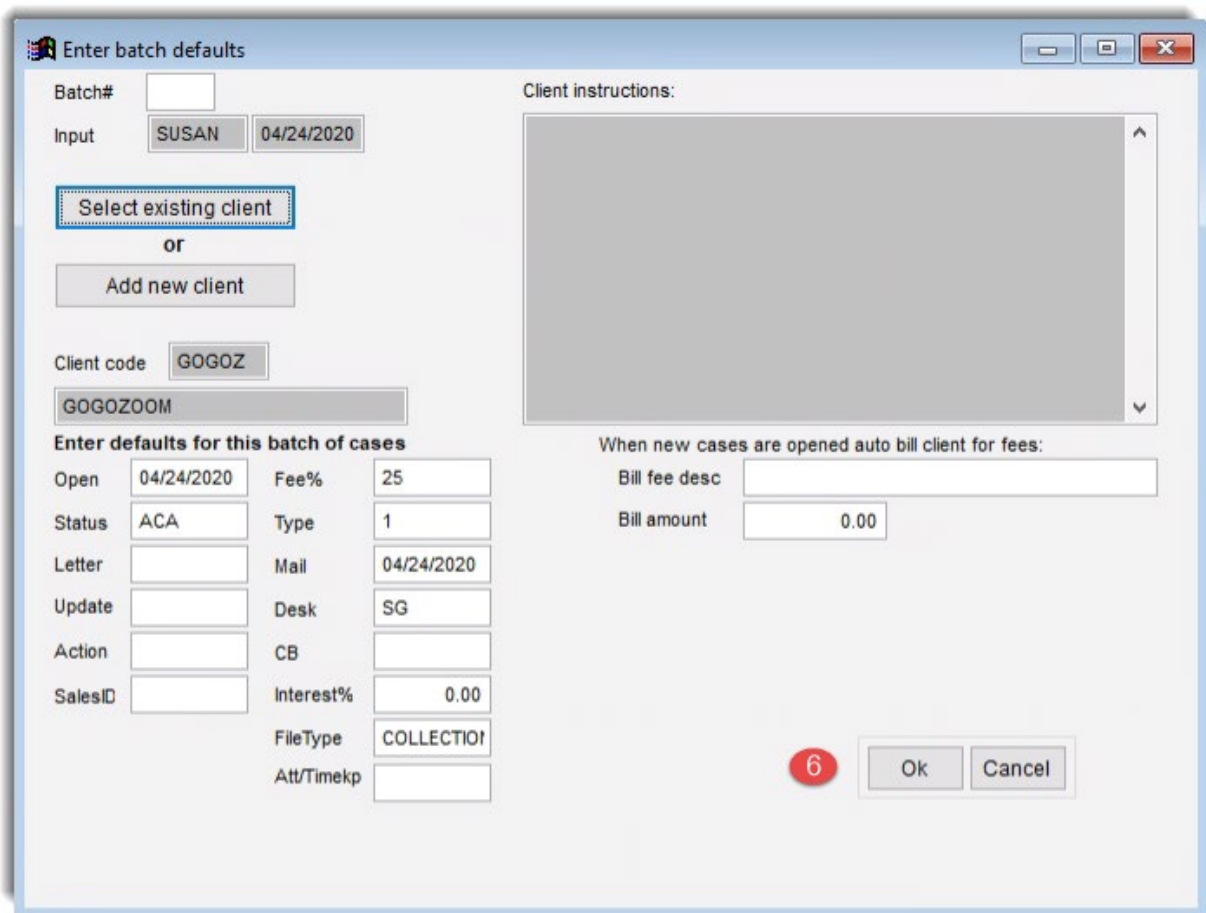
3. Click **[Yes]** to continue.



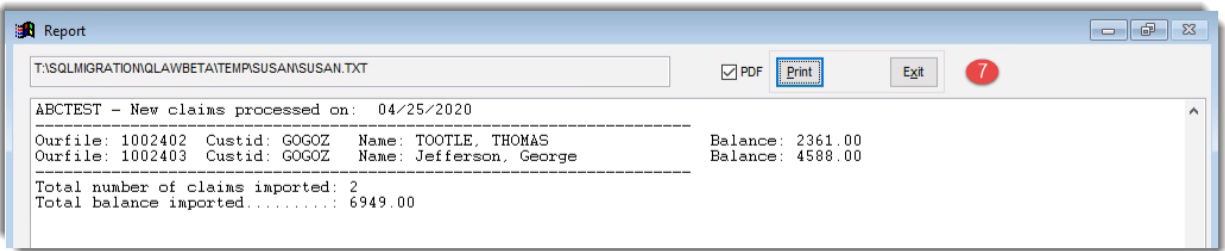
4. The data in the flat file will display in a list for review. Click **[Exit]** to continue.



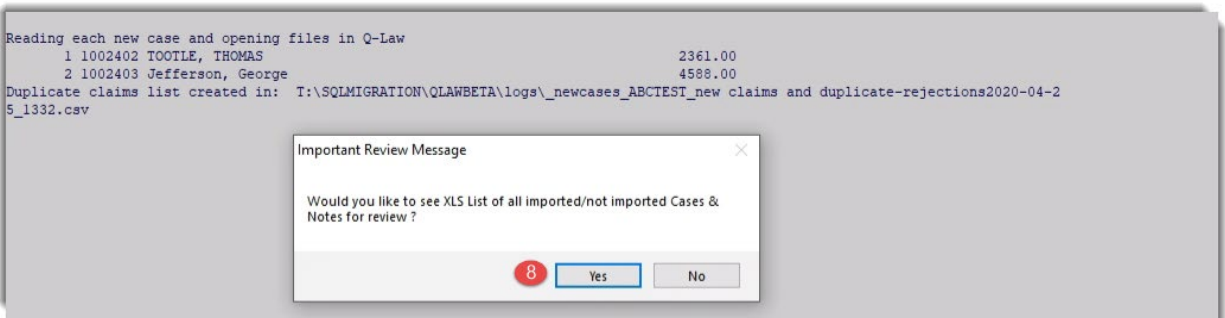
5. Click **[Yes]** to continue with import.



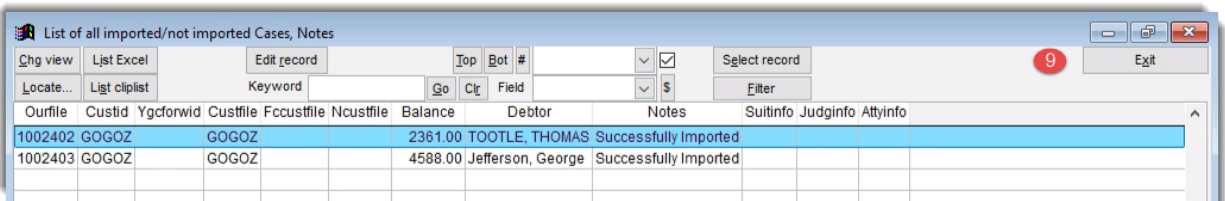
6. If a client is in the EDI group setup, it will display here. If you did not identify a client for this EDI group, then select one here by clicking **[Select existing client]** and selecting a client from the list. After you have selected a client, click **[Ok]**.



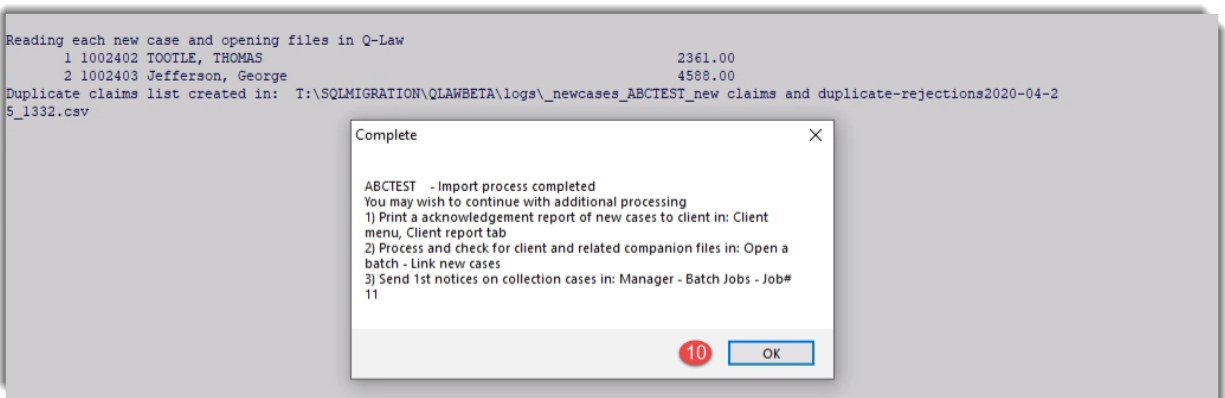
7. Summary of the files to be imported. Click **[Exit]** to continue.



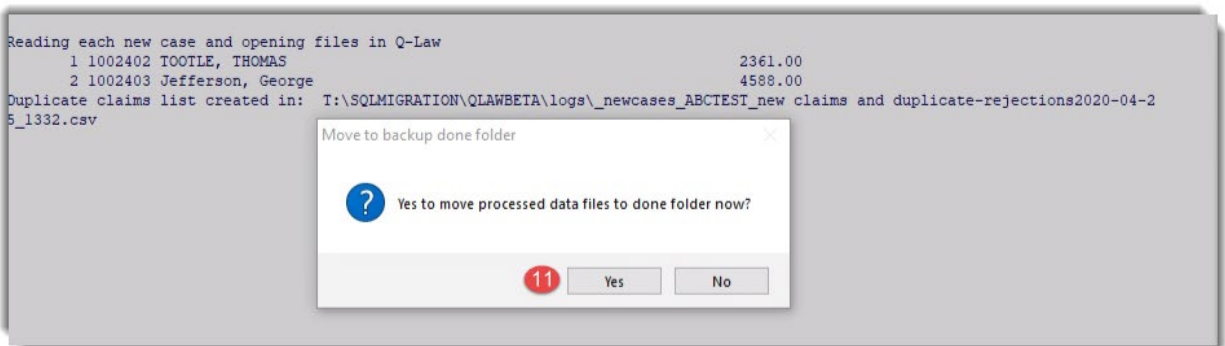
8. Click **[Yes]** to see XLS list, otherwise **[No]** to continue.



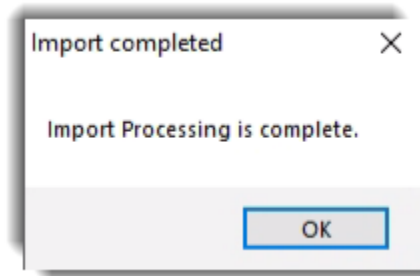
9. List of the imported/not imported Cases, Notes.



10. Process completed.



11. Click **[Yes]** to move processed data files to the done folder.



V Vendor Import

Unlike Flat-file mapping, vendor import enables you to import data to accounts that already exist in Q-Law(E). You can use the following data formats for import files.

1. Standard Data Format (SDF)
2. Comma Separated Values (CSV)
3. Excel Spreadsheet (XLS or XL5)

Note: When importing a csv file, the top row (header) will be stripped from the file. XLS/XL5 retains the top row when importing.

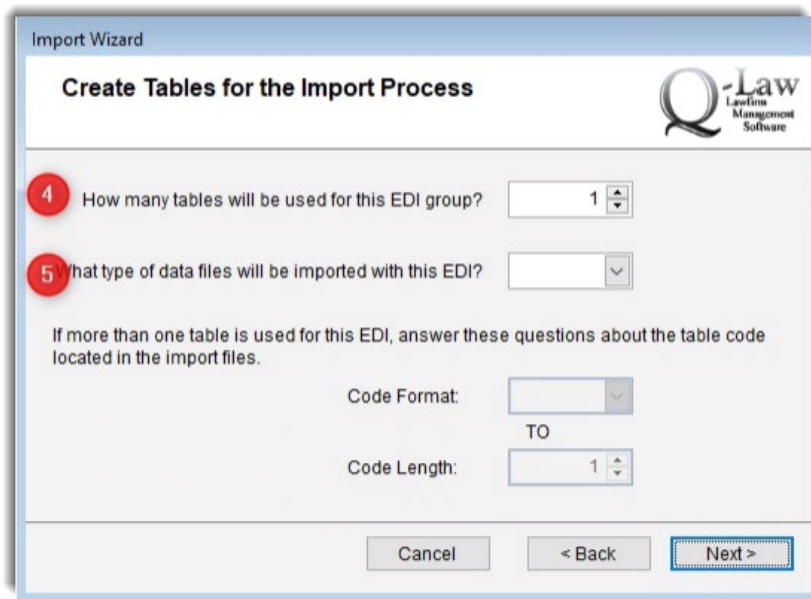
VI Build the Table in Q-Law(E)

1. Go to [Maintenance]→Edi - Custom Modules - Help tab→[EDI Vendor Import]→[Create/Modify EDI Group].
2. **EDI Group Name** – Can be no more than 10 characters long, no special characters.
3. **Client Code** – *Leave blank.*



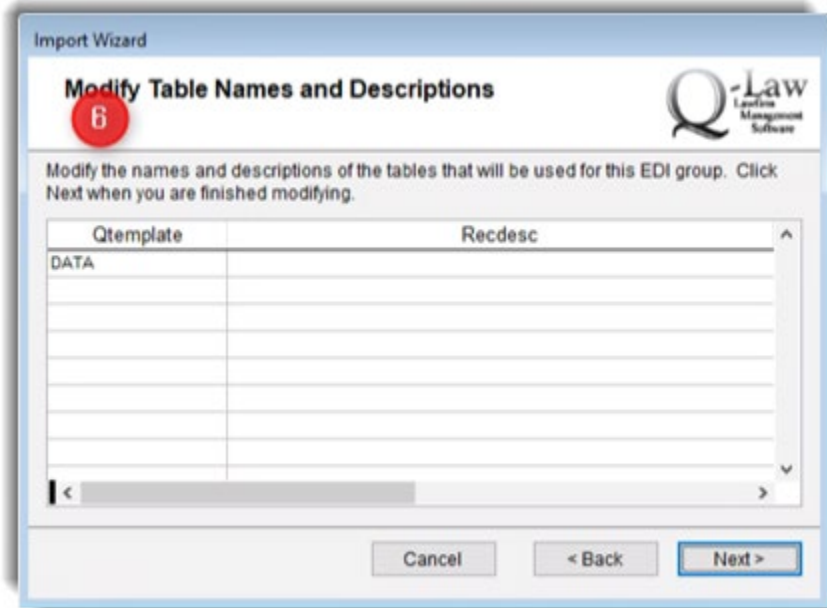
The screenshot shows the 'Import Wizard' dialog box with the title 'Create or Modify an EDI Group'. The 'Q-Law Lawfirm Management Software' logo is in the top right. There are two radio buttons: 'Create a new EDI Group' (selected) and 'Modify an existing EDI Group'. Under 'Create a new EDI Group', there are two text input fields: 'EDI Group Name' (with a red '2' next to it) and 'Client Code' (with a red '3' next to it). Under 'Modify an existing EDI Group', there is a dropdown menu labeled 'EDI Group:'. At the bottom are 'Cancel', '< Back', and 'Next >' buttons.

4. **How many tables will be used for this EDI group?** 1
5. **What type of data files will be imported with this EDI?** SDF, CSV, XLS or XL5.

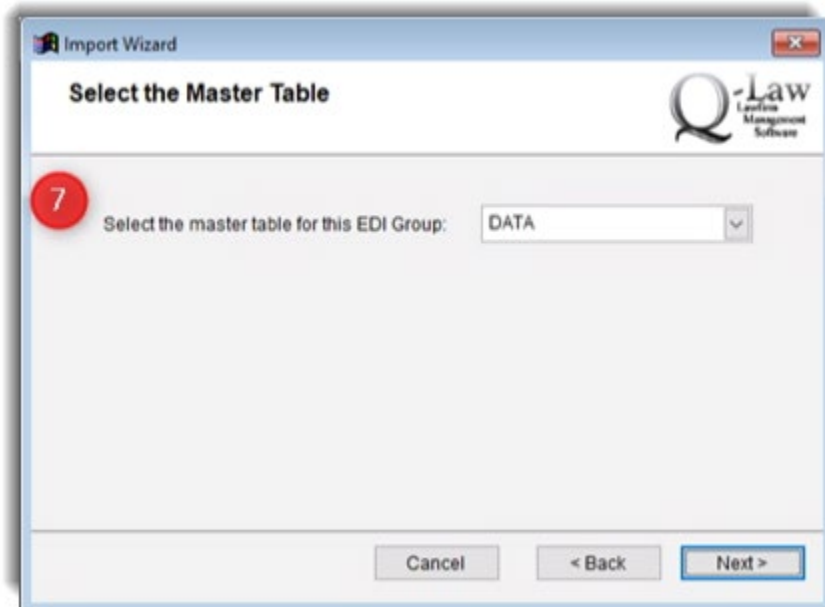


The screenshot shows the 'Import Wizard' dialog box with the title 'Create Tables for the Import Process'. The 'Q-Law Lawfirm Management Software' logo is in the top right. There are two questions with input fields: '4 How many tables will be used for this EDI group?' with a spinner box set to '1', and '5 What type of data files will be imported with this EDI?' with a dropdown menu. Below these is the text: 'If more than one table is used for this EDI, answer these questions about the table code located in the import files.' There are two more input fields: 'Code Format:' with a dropdown menu and 'Code Length:' with a spinner box set to '1'. At the bottom are 'Cancel', '< Back', and 'Next >' buttons.

- Modify Table Names and Descriptions** – Leave as Data or rename to the name of the spreadsheet. Normally, keep it as Data.



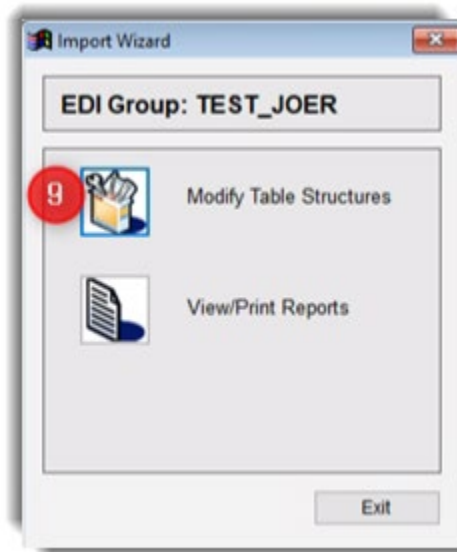
- Select the Master Table** – Choose the table you wish to work with:



8. Headers and Footers – Is there a header or footer in your spreadsheet? Select **Remove headers and footers** from the import files. Enter the **Number of lines in the header** and include any blank lines so they will not be imported; do the same with footer if there is a footer. If not, select **Do not remove headers and footers**.



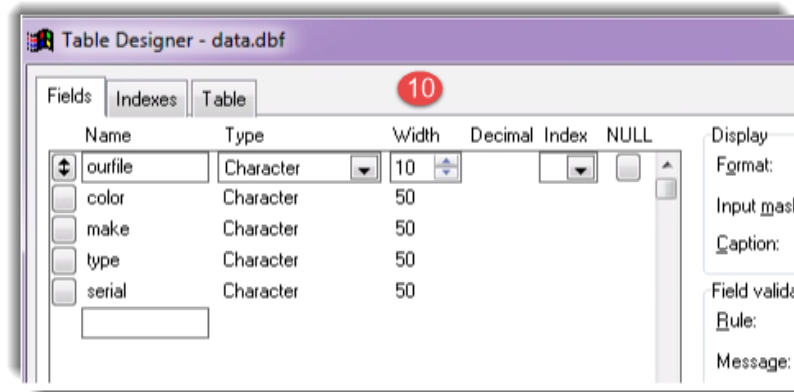
9. **Modify Table Structures**



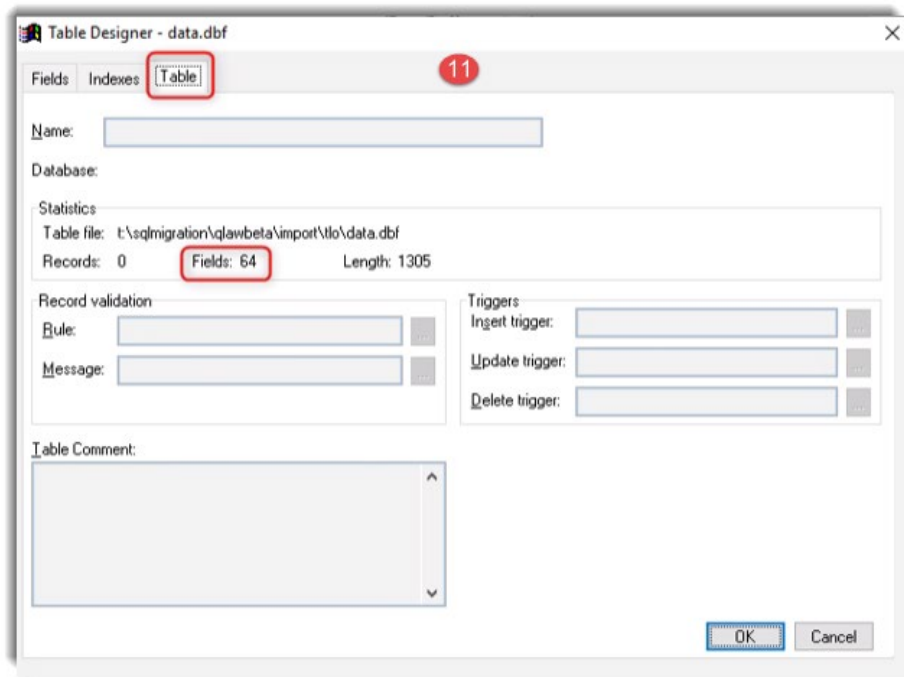
10. You will add your fields to match your template in the table designer. Description will be the name; the name field cannot start with a number and can only be 10 characters, so you may

need to abbreviate. You can specify type List headers – Name, Type, Width. Make sure the field is capable of handling the largest number; Q-Law(E) will cut off when width is exceeded.

Depending on which account number field you are using to match accounts that already exist in Q-Law(E), there must be one of the following in the table structure: Custfile, ourfile, ncustfile, or fccustfile.



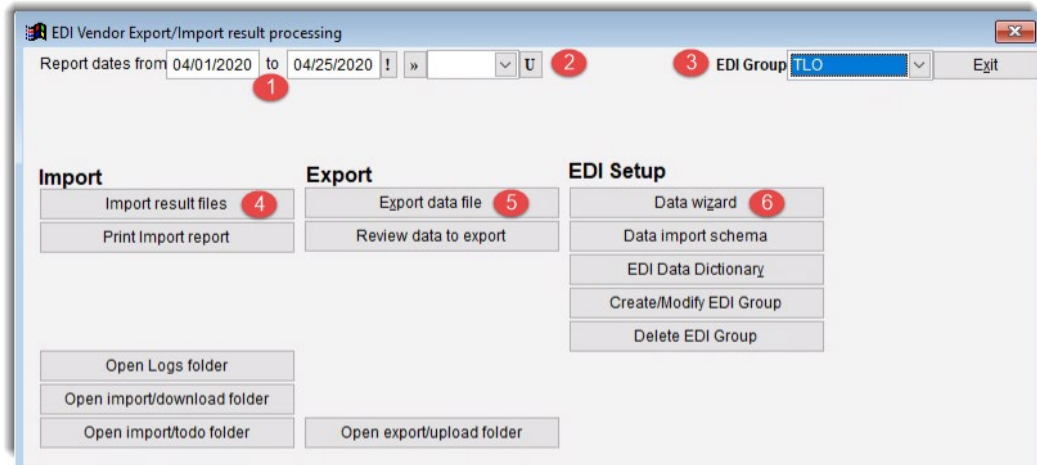
- In the **Table** screen, confirm that the amount within **Fields** matches the number of columns you will be importing from the spreadsheet. If not, you will need to review.



If you need to add a field, click **[Maintenance]→Edi - Custom Modules - Help tab→[EDI Vendor Import]→[Create/Modify EDI Group]**. Then choose **[Create new EDI Group]** OR **[Modify an existing EDI Group]→Select Group→Modify Table Structures** and add new one at the end.

You can also delete; just make sure the deleted fields are removed from the import file.

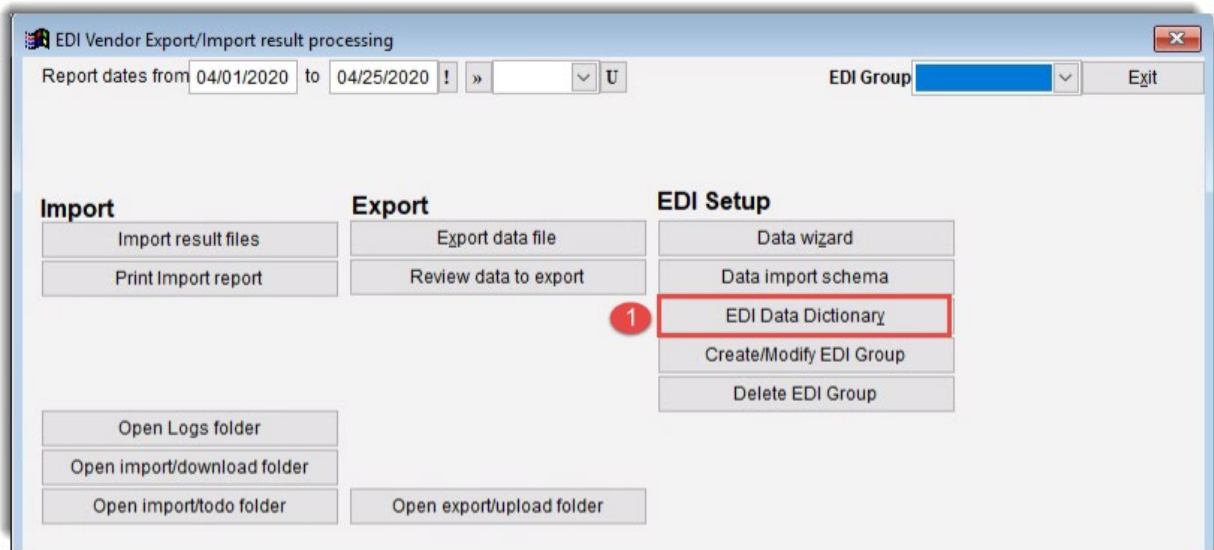
VII EDI Vendor Export/Import Screen in Q-Law(E)



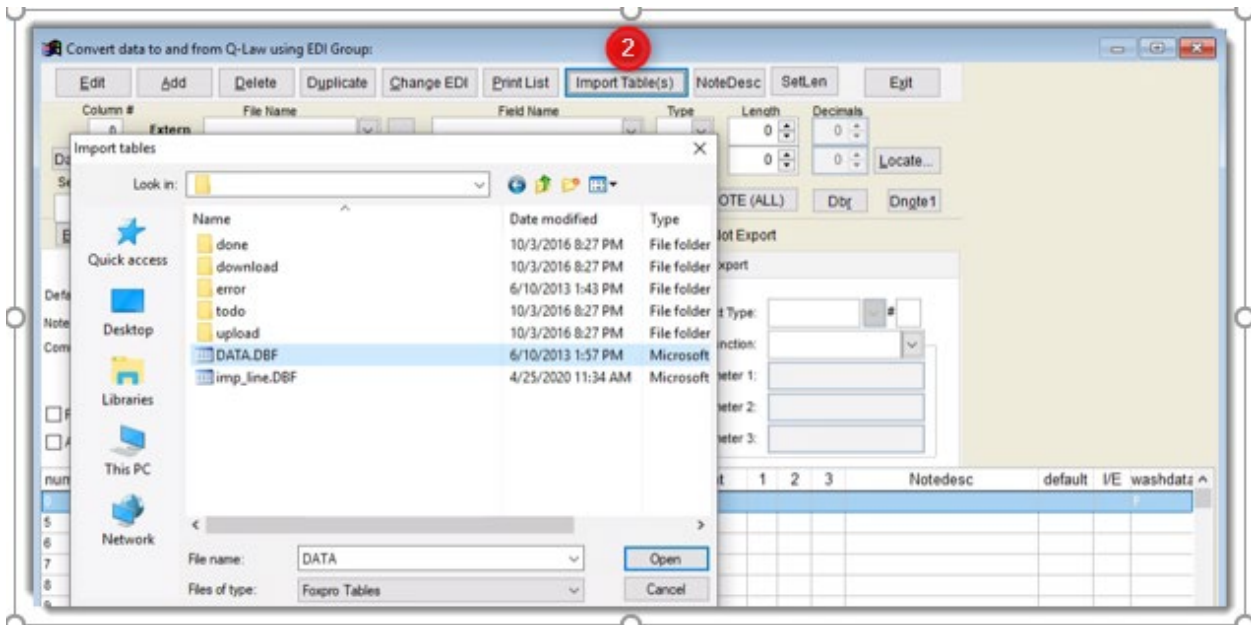
1. **Report dates from/to** – Allows you to set date parameters when running a report or using one of the tool functionalities.
2. Select frequency of reporting of status updates for the selected EDI.
3. Select the EDI Group from the **EDI Group** dropdown.
4. **Import:**
 - a) **Import result files** – Import the files from `.\import*EDI Group Name\todo`
* you will replace the red with the actual EDI Name.
 - b) **Print import report** – Print report of last processing of maintenance status and demographic data.
 - c) **Open Logs folder** – Opens the main log folder in Q-Law(E).
 - d) **Open import/download folder** – Review the import/download files from `.\import*EDI Group Name\download`.
* you will replace the red with the actual EDI Name.
 - e) **Open import/todo folder** – Review files located in `.\import*EDI Group Name\todo`.
* you will replace the red with the actual EDI Name.
5. **Export:**
 - a) **Export data file** – To begin exporting the EDI Group selected data files.
 - b) **Review data to export** – Will open a grid showing the data to be exported.
 - c) **Open export/upload folder** – Review files in `\import*EDI Group Name\upload`.
* you will replace the red with the actual EDI Name.
6. **EDI Setup:**
 - a) **Data wizard** – Allows import of new cases into Q-Law(E); not currently recommended for use.
 - b) **Data import schema** – Allows selection of basic setup settings, such as deletion of header/footer rows, import file type, enabling use of DDAS trigger, etc.
 - c) **EDI Data Dictionary** – All EDI imports in Q-Law(E) involve a data dictionary. This is where we define what the incoming data is and where it will be mapped to in Q-Law(E).
 - d) **Create/Modify EDI Group** – Allows for creation or modification of EDI group in Q-Law(E).
 - e) **Delete EDI Group** – Allows removal of EDI group in Q-Law(E).

VIII EDI Data Dictionary

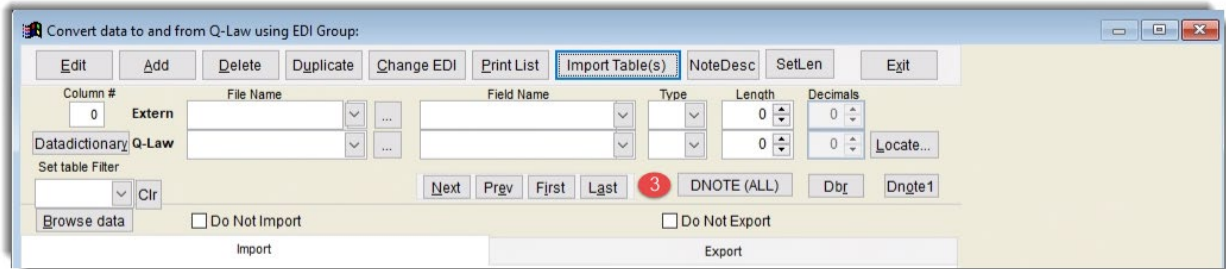
1. Click **[EDI Data Dictionary]**.



2. Click **[Import table(s)]** and navigate to the U:\Q-Law(E)\Import\Vendor Name" folder and select the desired dbf file.



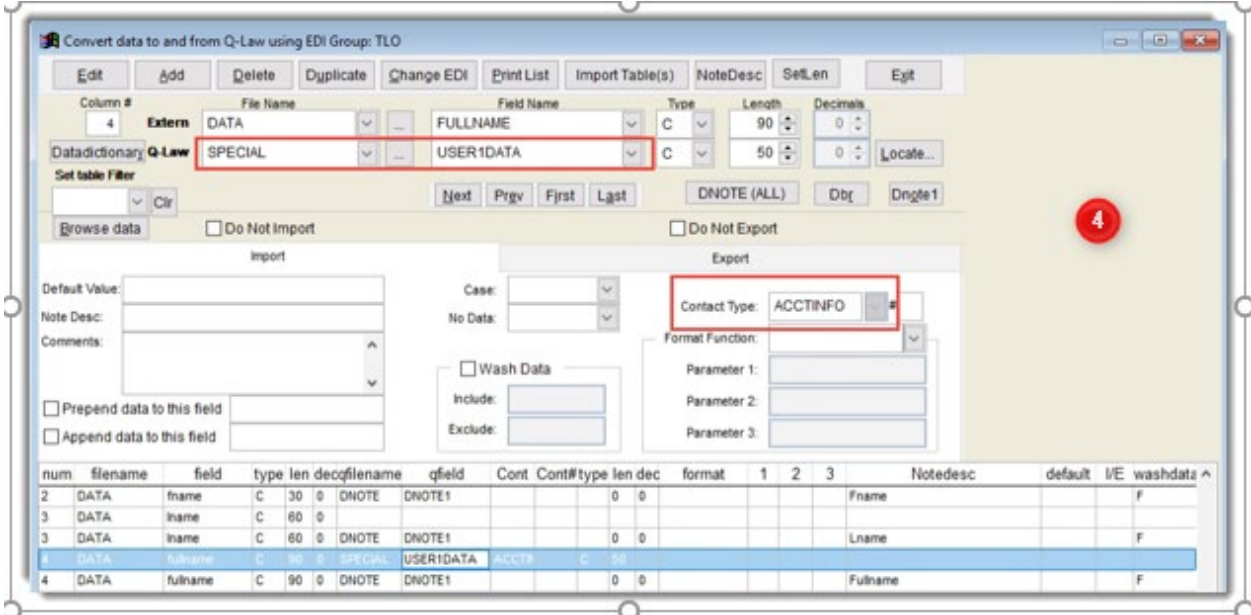
- Do you want a note line for note history showing headers and what was imported? If so, select [DNOTE (ALL)]→[Yes].



You can now map the data. Select the Data you are mapping in the bottom field and in the above fields. Make sure for the Q-Law(E) mapping that you select the **File Name** from the dropdown and select the **Field Name** where the information will be stored in Q-Law(E).

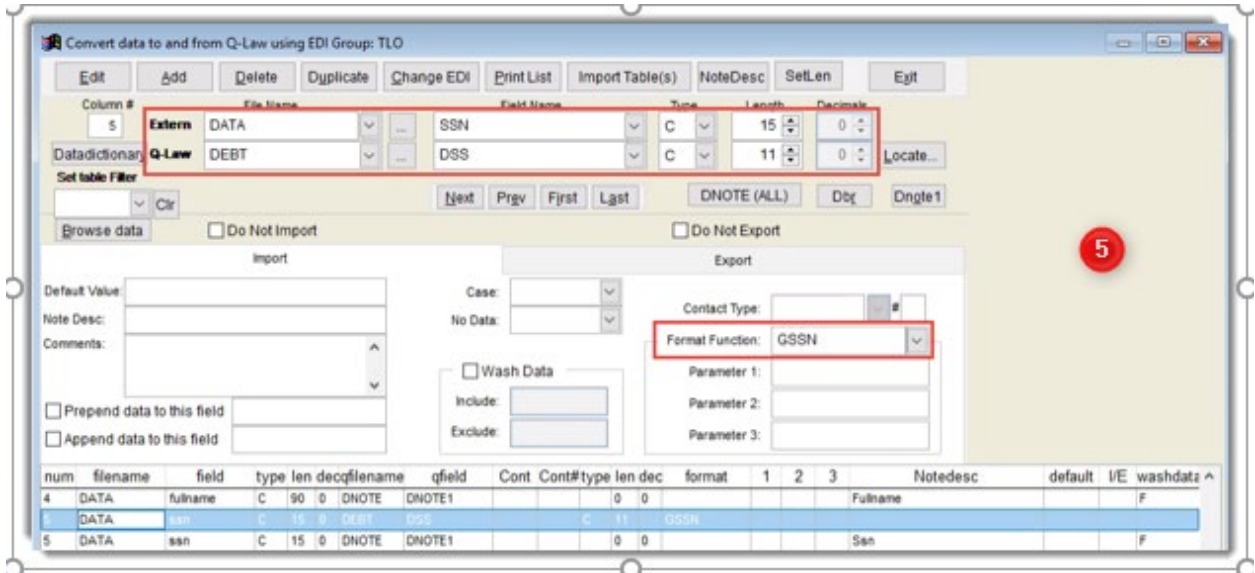
Below are four examples of adding to the data dictionary.

- MAPPING TO A FIELD IN A SPECIAL TEMPLATE:** In this example, data table FULLNAME field is mapped to the Q-Law(E) Special Template named ACCTINFO (as seen under Contact Type), in USER1DATA field name.



num	filename	field	type	len	dec	qfilename	qfield	Cont	Cont#	type	len	dec	format	1	2	3	Notedesc	default	I/E	washdata	
2	DATA	fname	C	30	0	DNOTE	DNOTE1				0	0						Fname			F
3	DATA	lname	C	60	0	DNOTE	DNOTE1				0	0						Lname			F
4	DATA	fullname	C	90	0	SPECIAL	USER1DATA	ACCTI		C	90	0						Fullname			F

5. USING FORMAT FUNCTIONS: The data in the import file does not include dashes for the SSN number. In this example, the field SSN in the data table will be mapped to the field DSS in the DEBT table in Q-Law(E). Using the format function GSSN will add the dashes to the SSN where applicable.



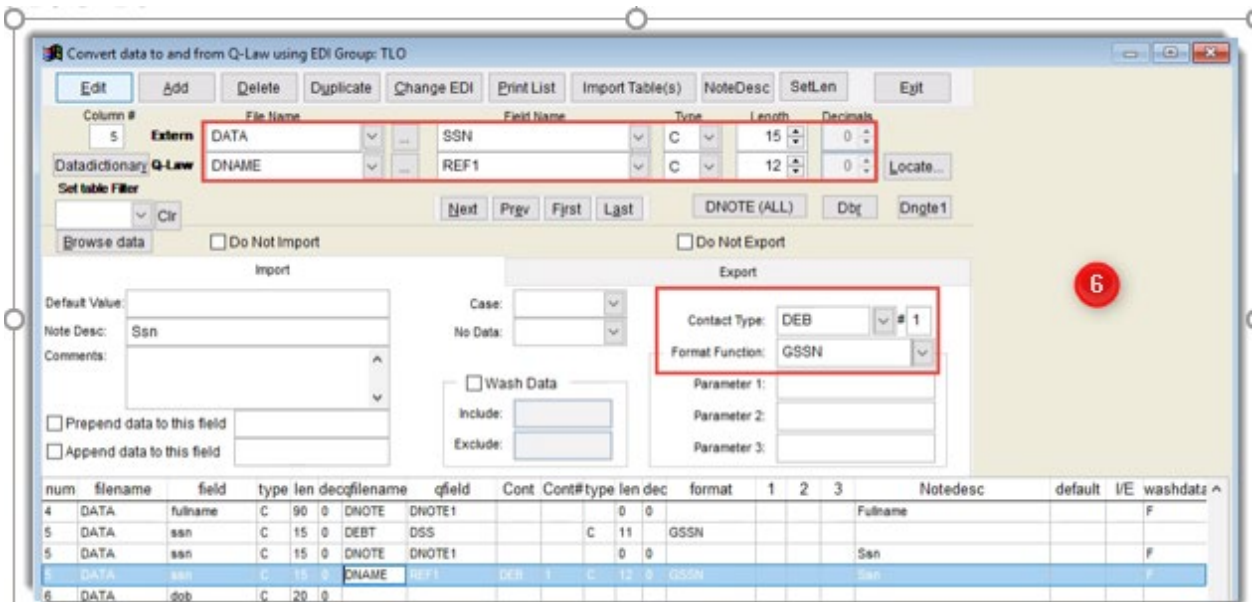
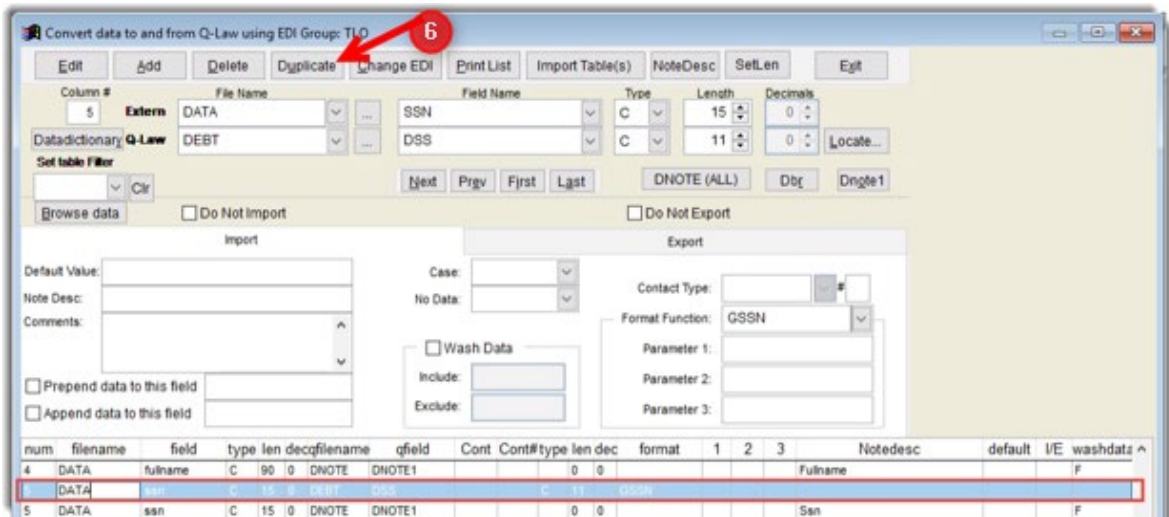
Convert data to and from Q-Law using EDI Group: TLO

Column #	File Name	Field Name	Type	Length	Decimals
5	DATA	SSN	C	15	0
	Q-Law DEBT	DSS	C	11	0

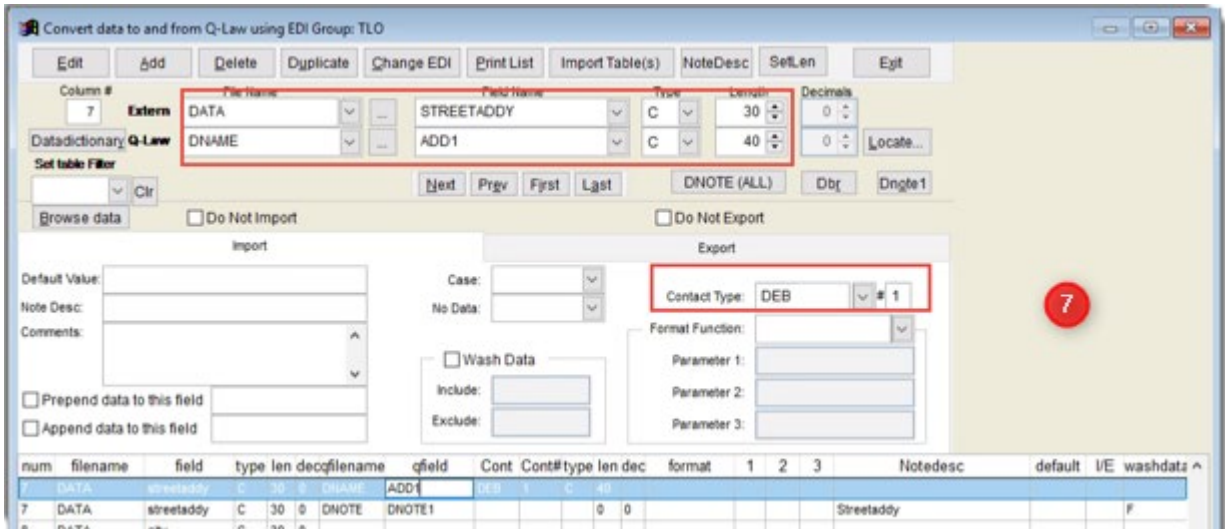
Format Function: GSSN

num	filename	field	type	len	dec	qfilename	qfield	Cont	Cont#	type	len	dec	format	1	2	3	Notedesc	default	I/E	washdata
4	DATA	fullname	C	90	0	DNOTE	DNOTE1										Fullname			F
5	DATA	ssn	C	15	0	DEBT	DSS			C	11	0	GSSN				Ssn			F
5	DATA	ssn	C	15	0	DNOTE	DNOTE1													

- MAPPING THE SAME DATA TO MULTIPLE FIELDS IN Q-Law(E): The same data mapped to another field in Q-Law(E) can be accomplished by doing the following: Highlight the row to be mapped to another Q-Law(E) field and click **[Duplicate]** to add a duplicate row below the highlighted row. Then simply map the data to another field in Q-Law(E).



- MAPPING DATA TO A SPECIFIC CONTACT IN Q-Law(E): In this example, data table STREETADDY field is mapped to the DEB contact, party number 1 ADD1 field in Q-Law(E).

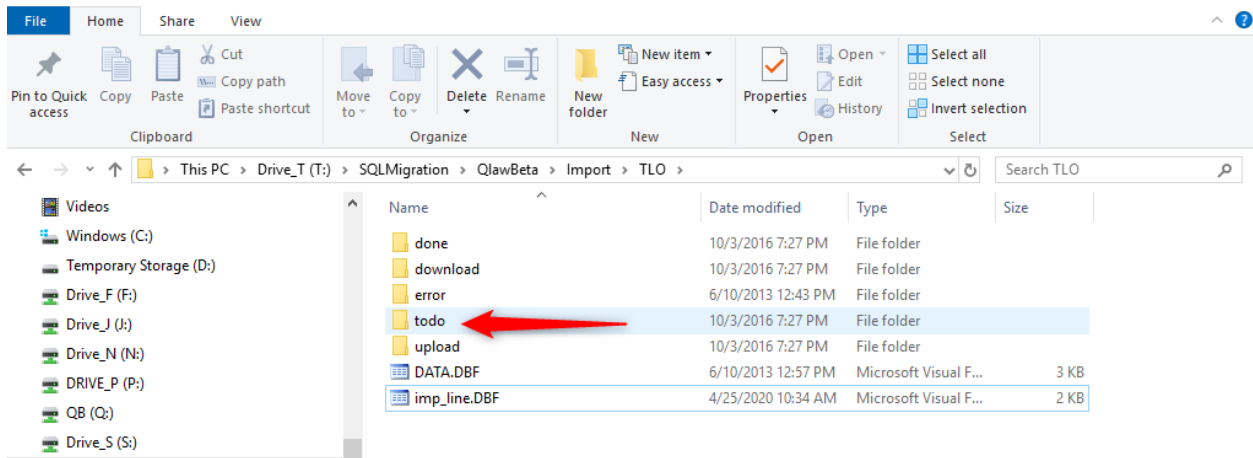


The screenshot shows the 'Convert data to and from Q-Law using EDI Group: TLO' window. At the top, there are buttons for 'Edit', 'Add', 'Delete', 'Duplicate', 'Change EDI', 'Print List', 'Import Table(s)', 'Note Desc', 'Set Len', and 'Exit'. Below these is a table with columns: Column #, File Name, Field Name, Type, Length, and Decimals. The table contains two rows: one for 'DATA' mapped to 'STREETADDY' (Type C, Length 30) and another for 'DNAME' mapped to 'ADD1' (Type C, Length 40). Below the table are buttons for 'Next', 'Prvg', 'First', 'Last', 'DNOTE (ALL)', 'Dbr', and 'Dngte1'. There are also checkboxes for 'Do Not Import' and 'Do Not Export'. The 'Export' section has a 'Contact Type' dropdown set to 'DEB' and a party number '# 1'. At the bottom, there is a detailed table with columns: num, filename, field, type, len, dec, filename, cfield, Cont, Cont#, type, len, dec, format, 1, 2, 3, Notedesc, default, I/E, washdata.

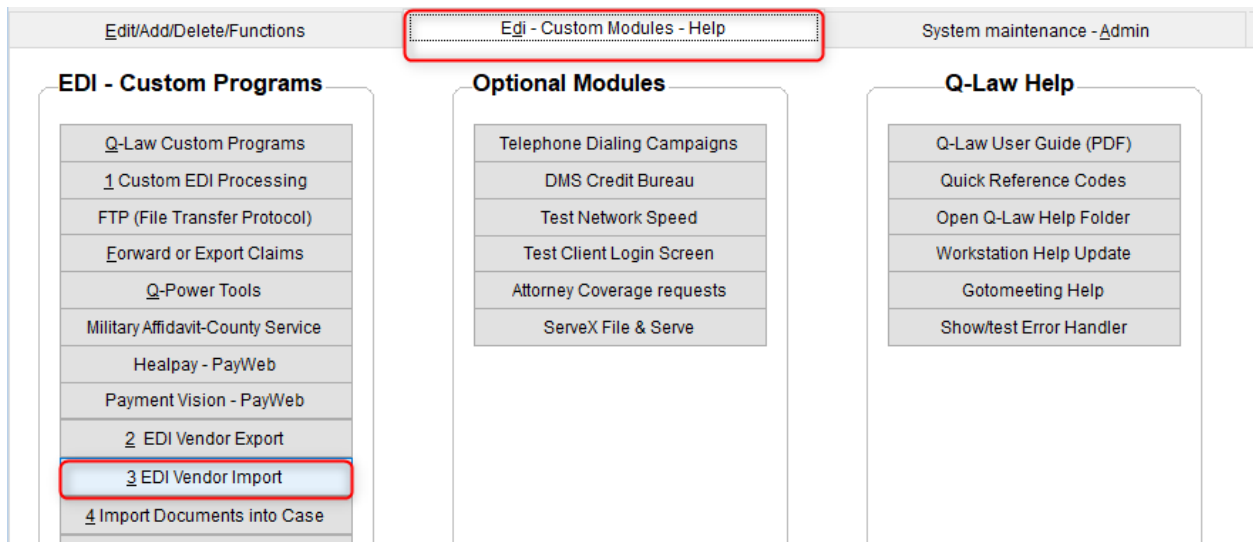
num	filename	field	type	len	dec	filename	cfield	Cont	Cont#	type	len	dec	format	1	2	3	Notedesc	default	I/E	washdata
7	DATA	streetaddy	C	30	0	DNAME	ADD1	DEB	1	C	40						Streetaddy			F

IX Importing the Data File Via Vendor Import

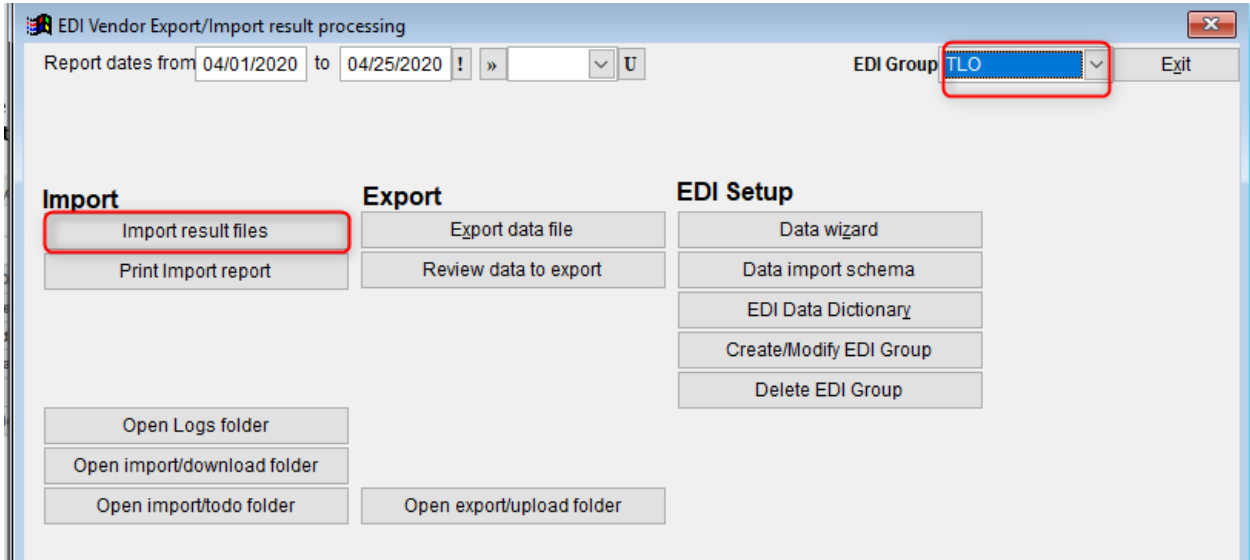
Once the EDI group is created and the data dictionary is defined, the next step is to move the import file to the Q-Law(E)/import/EDI group name/todo folder.



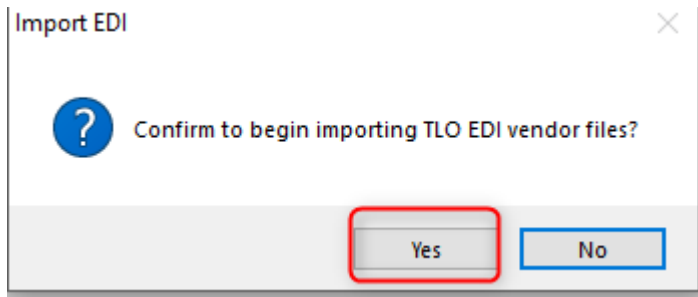
Once the file is in the todo folder, you are ready to import the data file into Q-Law(E). On the **Main** menu click **[Maintenance]→Edi - Custom Modules - Help tab→[EDI Vendor Import]**.



1. From the **Custom EDI Processing and Maintenance** screen, select the **EDI Group**.
2. Click **[Import result files]**.



3. Click **[Yes]** to continue.

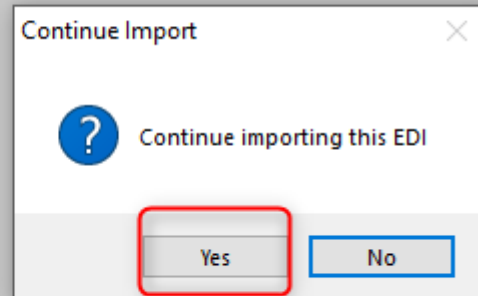


4. The data in the data file being imported will display in a list for review. Click **[Exit]** to continue.

Ourfile	Fname	Lname	Fullname	Ssn	Dob	Streetaddy	City	State	Zip	Phone	Add1	City1	State1	Zip1	Firstseen1	Lastseen1	Add2	City2	St
261111	Mary	Tot	Mary Tot	305126654	10/21/1962	400 Mapypearl Dr	Allen	TX	75002						//	//			
100012	Annie	Baby	Annie Baby	222336699	5/13/1980	200 Stitch Drive	Little Elm	TX	75068	239-777-6599					//	//			

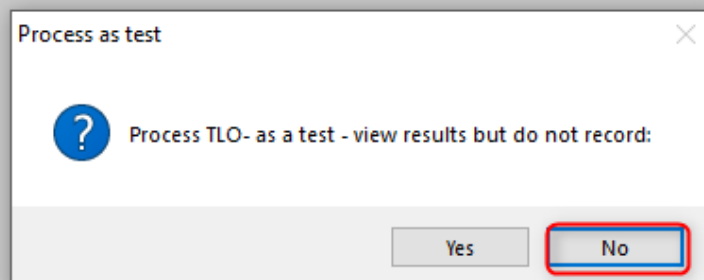
5. Click **[Yes]** to continue with import.

Processing request...Please wait
TLO TEST.CSV Filetype: CSV



6. Pay attention to the next prompt; it gives you the option to import as a test. If you select **[Yes]**, it will only test the import. You should click **[No]** to actually import the data.

Processing request...Please wait
TLO TEST.CSV Filetype: CSV



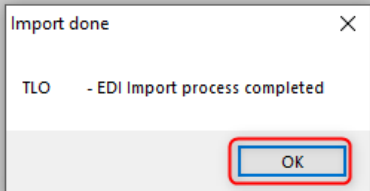
7. The data will then import, and a prompt appears when completed; click **[OK]**.

```

Processing request...Please wait
TLO TEST.CSV  Filetype: CSV
TLO-
-----
Process on date: 04/25/2020 - 20:01:30
Process by user: MICHELLE
Import data file TLO TEST.CSV
Logfile \\vt-drives01\drive_N\drive_T\SQLMIGRATION\QLAWBETA\logs\VENDOR_IMPORT_TLO_DATA-log-20200425-200130.txt
-----
1 Ourfile: 261111      - TLO- import information: Ourfile
  - 261111Fname          - MaryLname
  - TotFullname          - Mary TotSsn
  - 305126654Dob         - 10/21/1962Streetaddy
  - 400 Mapypearl DrCity - AllenState
  - TXZip                - 75002Firstseen1
  - / /Lastseen1         - / /Firstseen2
  - / /Lastseen2         - / /Empname
  - Wal-MartEmpadd       - 200 Sams DrEmpcity
  - FriscoEmpstate      - TXEmpzip
  - 75061Empphone        - 8888505050Proplpurch
  - / /Prop1sale         - / /Prop1defau
  - / /Prop1lispe        - / /Prop2purch
  - / /Prop2sale         - / /Prop2defau
  - / /Prop2lispe        - / /

-----
2 Case file was not matched on this ourfile: 100012

-----
Total number of records imported: 2
Time completed: 20:01:32
  
```

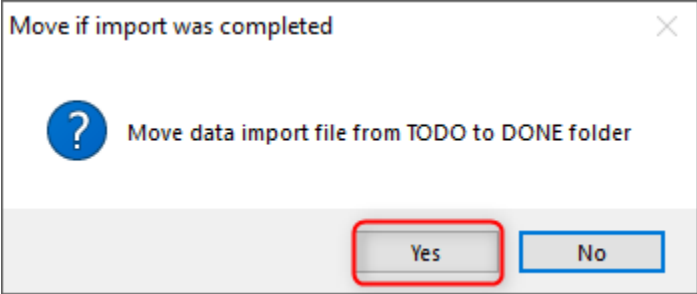


Import done

TLO - EDI Import process completed

OK

8. Once the import has completed, you get the option to move the data file to the done folder; click **[Yes]** to move the import data file.



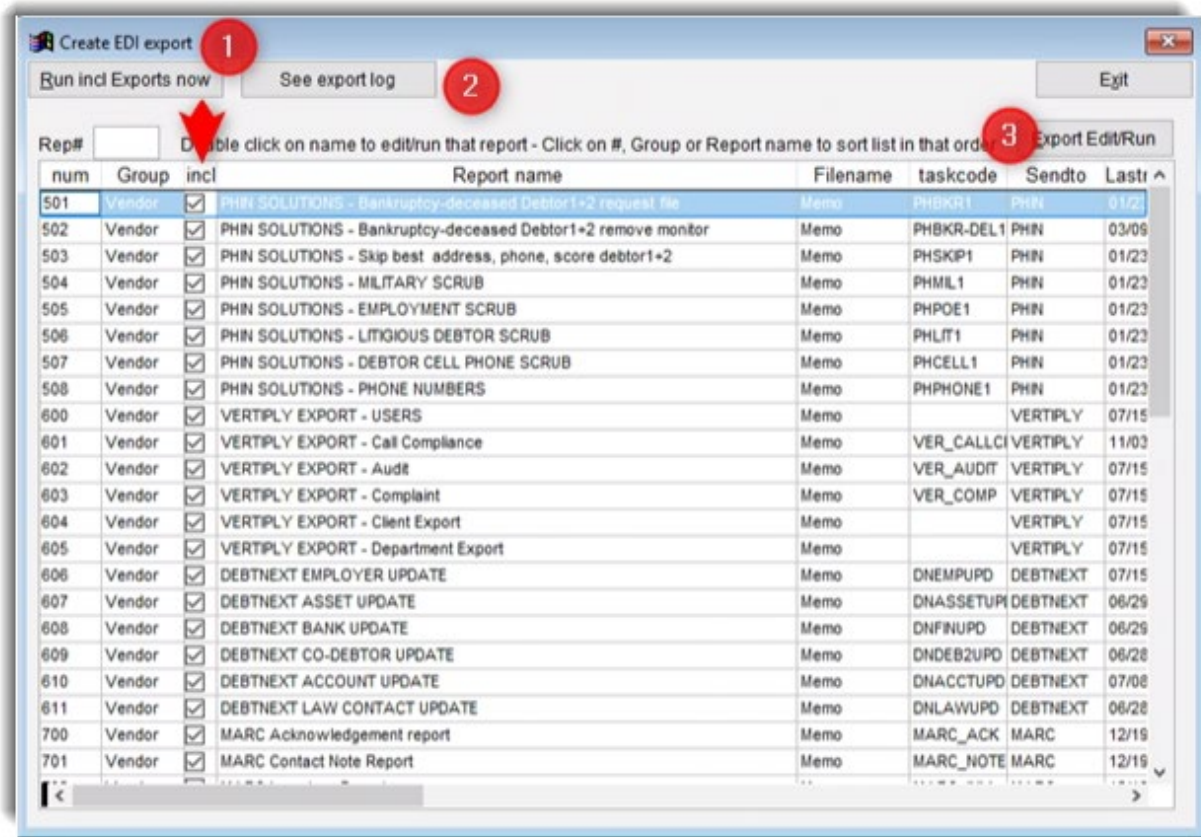
Move if import was completed

? Move data import file from TODO to DONE folder

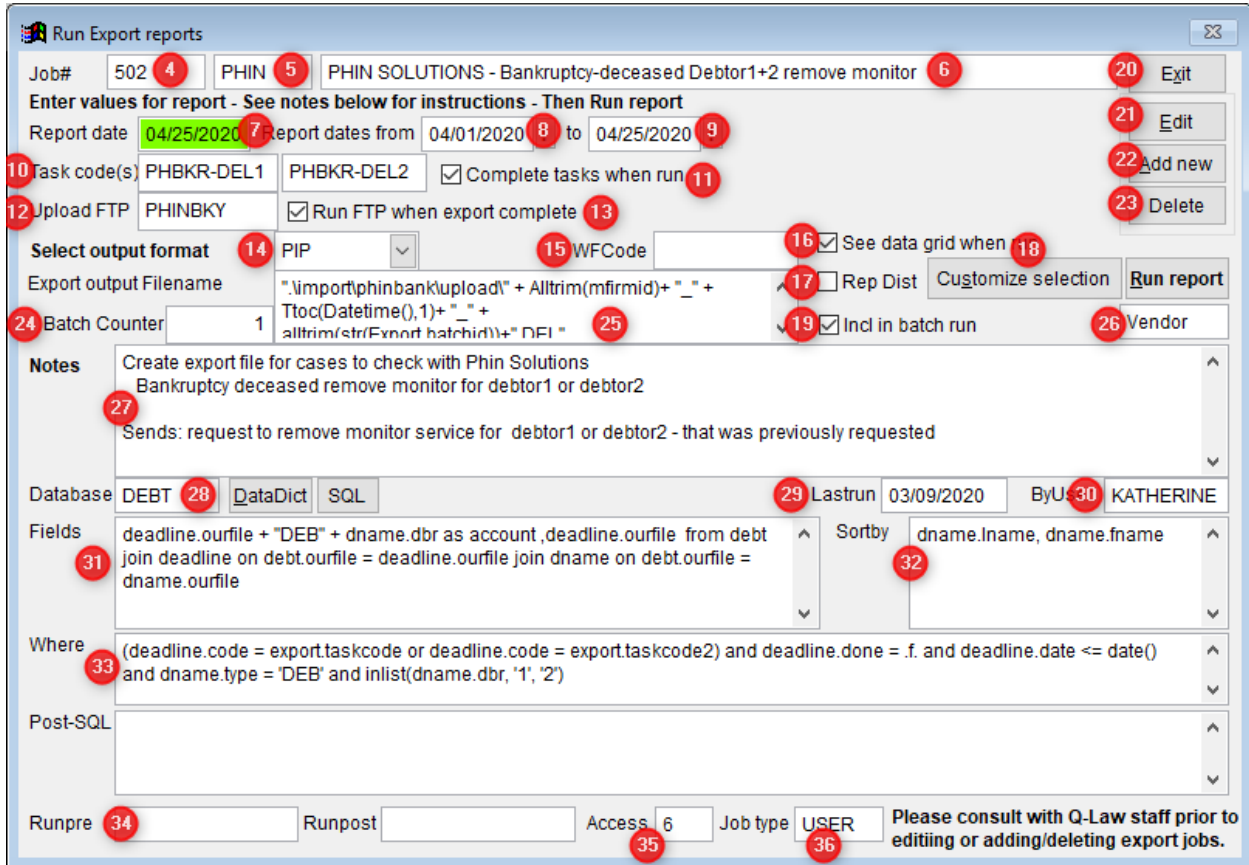
Yes No

Process completed.

X Vendor Export



1. **Run incl Exports Now** – Allows you to run multiple exports by checking the box corresponding to the exports you wish to run.
2. **See export log** – Allows you to review a log of exports that have executed.
3. **Export Edit/Run** – As with Reports & Query, you can run or edit the highlighted export.



The screenshot shows the 'Run Export reports' window with the following fields and controls highlighted by numbered callouts:

- 4: Job# (502)
- 5: PHIN
- 6: PHIN SOLUTIONS - Bankruptcy-deceased Debtor1+2 remove monitor
- 7: Report date (04/25/2020)
- 8: Report dates from (04/01/2020)
- 9: Report dates to (04/25/2020)
- 10: Task code(s) (PHBKR-DEL1, PHBKR-DEL2)
- 11: Complete tasks when run (checked)
- 12: Jpload FTP (PHINBKY)
- 13: Run FTP when export complete (checked)
- 14: Select output format (PIP)
- 15: WFCCode
- 16: See data grid when (checked)
- 17: Rep Dist (unchecked)
- 18: Customize selection
- 19: Incl in batch run (checked)
- 20: Exit
- 21: Edit
- 22: Add new
- 23: Delete
- 24: Batch Counter (1)
- 25: Export output Filename
- 26: Vendor
- 27: Notes
- 28: Database (DEBT)
- 29: Lastrun (03/09/2020)
- 30: ByU (KATHERINE)
- 31: Fields
- 32: Sortby (dname.lname, dname.fname)
- 33: Where
- 34: Runpre
- 35: Access (6)
- 36: Job type (USER)

When you first enter the **Export Edit/Run** screen from the **EDI Vendor Export** screen, you will notice that most of the fields used to configure the report will be hidden. Clicking **[Edit]** will display all the hidden fields used to configure the report. Below is a description of the fields located on this screen (above).

4. **Job#** – Each report is given a unique report number.
5. **Report for** – The actual Vendor you are sending the Export (Ex. PHIN – PHIN Solutions).
6. **Description** – Type in a freeform description of your export that will be visible in the **EDI Export** screen.
7. **Report date** – This date can be displayed in the results of the report when it is run. The default is today's date but can be changed to another date by manually typing it in.
8. **Report dates from** – This date will represent the starting date for the report when it is run. The default is the first day of the current month but can be manually changed to another date. If the report does not use a date range, this field would be ignored.
9. **(Report dates) to** – This date will represent the ending date for the report when it is run. The default is today's date but can be manually changed to another date. If the report does not use a date range, this field would be ignored.

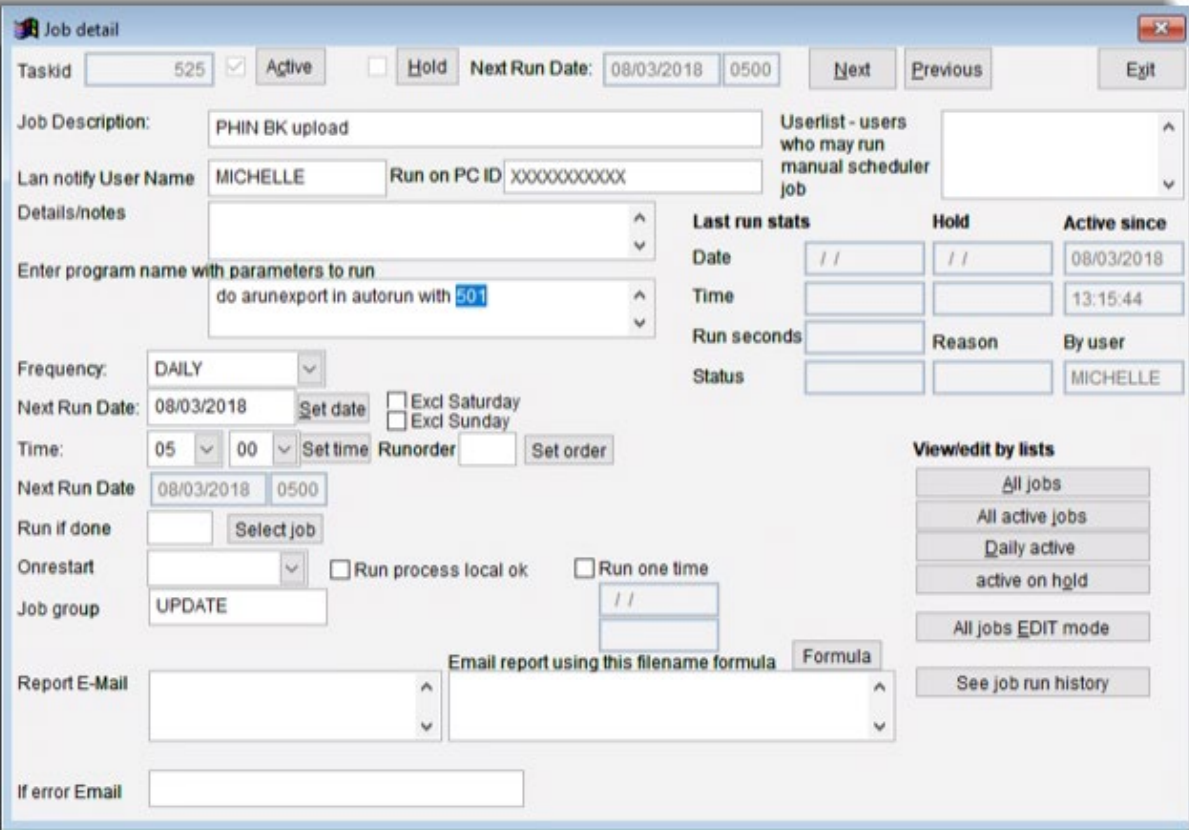


10. **Task code(s)** – Enter a valid task code from the task code manager used in cases for this export. The second Task code is from task code manager2.
11. **Complete tasks when run** – Checking this will complete all tasks included in export. If unchecked, results are shown without updating the task.
12. **Upload FTP** – Enter a valid EDI FTP code to use when uploading to FTP site.
13. **Run FTP when export complete** – Check to start upload using FTP code and EDI FTP. If unchecked, it will not upload.
14. **Select output format** – How you wish the export to be formatted. Example: CSV, XLS, Tab Delimited, and other formats. By selecting the dropdown box, all available formatting will be shown.
15. **WFCode** – Allows you to apply skiptrace waterfall rules.
16. **See data grid when run** – Allows you to view the data being exported in a grid.
17. **Rep Dist** (Report Distribution) – If the report output is PDF, check this box to make the report available in the report distribution system.
18. **Customize selection** – Click this to display the **Select Conditions** screen to help build the “where” clause.
19. **Incl in batch run** – Allows this job to be run in batch process including job scheduler.
20. **Exit** – Exits out of the report.
21. **Edit** – Click to open the configuration fields to editing.
22. **Add new** – Adds a new report by duplicating the current report.
23. **Delete** – Deletes the current report.
24. **Batch Counter** – A system counter that shows how many output files have been created; can be used in output filename expressions.
25. **Export Output Filename** – This is the path file location and naming convention for the export file. Must include the file extension encompassed with quote marks. Anything that is hard coded in the output file name is encompassed in quote marks.
26. **Report for** – Enter who the report is for such as “CLIENT”, “FIRM”, or “RECEIVER”.
27. **Notes** – This field is a freeform field that will allow you to enter a description or instructions on running the report.
28. **Database** – Enter the main database that will be used in the report.
29. **Lastrun** – The date the report was last run.
30. **ByUser** – The username of the user who last ran the report.
31. **Fields** – Enter the field names that will be populated in the results file.
32. **Sortby** – Dictate the field name in your results file by which the report will be sorted. Enter multiple field names separated by commas. The sort order will follow the order the fields are listed here.
33. **Where** – This clause dictates what the report will filter on.
34. **Runpre and Runpost** – These fields allow the report to interact with custom programs. These fields are typically reserved for Vertican staff or used when directed.

35. **Access** – The access field dictates the user security level required to run or edit the report.

36. **Job type** – Enter “USER” into this field.

Job Scheduler can also be used to run the export(s) automatically:



The parameter to run an export is:
do arunexport in autorun with ____.

After “with,” add the job number you want it to run.

Screenshot below would require the parameters to be:
do arunexport in autorun with 502

