

Document Package Automation in Q-LawE

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 **The Mastermind Series**

Presented by  **VERTICAN
TECHNOLOGIES**

What We Will Cover

- Task Code Configuration
 - Using 1 Task Code per package type (DEMAND, COMPLAINT, etc)
- Document-Linking
- DDASDOCS & Media Attachments
- Task Groups & DOC2PDF
- How to Integrate into Workflow
- Log files
- WordPerfect Capability

Task Code Configuration

- Ultimate goal is to have 1 Task code per process regardless of:
 - Venue (efile & paper)
 - Client
 - Document package variations

Document-Linking

- Pulls document template based on:
 - Venue
 - Document group (=DS= code)
 - Judge
 - Account balance
 - Claimtype
- Prioritizes COURT level setup over STATE level setup

DDASDOCS & Media Attachments

- Case Special Codes Dropdown for boilerplate attachments
 - =DOCCODE= vs =DOCCOD1=
- DDASDOCS
 - Condition returns character string rather than True vs False
 - Can do everything Doc-Linking and Media Attachments can do
 - DDAS 201 MMS is available to download

Task Groups

- Required for QJS document processing
- Efile vs Paper Courts
- DOC2PDF
- Document-linked check printing

Integrating into Workflow

- Run document merges on Job Scheduler
 - DO AutoDocs in AutoRun WITH "TASKGROUPNAME"
- Use DDAS to send to AMR after merge is complete
- If AMR is failed, DDAS to send to WorkNow for resolution
- DDAS to remerge document package if WorkNow is passed

Logs

- .\QlawE\logs directory
- Template Document Change History

WordPerfect Capability

- WordPerfect documents will be supported in Q-LawE
- When a DOCCODE is a CM WordPerfect file CM configurations will be available
- Formulas - 10 buckets (PRC scripts)
 - PRC scripts processing including workflow - A few rarely used commands are not supported
- Mergepop fields - 20 buckets – minimize with SPECIAL template use
- PS Comments Screen - 12-character fields and six numeric fields (Infinity Fields/Special Template)
- Doc billing fields - if used will allow Q-LawE Trx 8 billing items to be created.
- Merge codes - F6 - Mail merge file fields 625-639 can be input here.
- 972 mail merge file

Questions & Answers

Please propose your questions in the Zoom chat **to everyone** and they will be answered during Q & A.



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