Worldox Quick Client Matter connectors

Purpose:

To facilitate the updating of Worldox profile tables with information from billing and practice management systems such as Elite, Juris, Omega and others.

Overview:

These connectors are designed to run via the Windows Scheduler and update relevant Worldox profile tables with new or changed client matter data which is derived by querying the billing system database directly.

It is recommended that the connector is installed and run on the indexer PC that services the relevant profile group

When the connector runs it will query the billing system according to the configured parameters and will update the relevant Worldox profile tables directly via the Worldox API so that new or updated client and matter information is available to the users with the minimum of delay.

Additional Features:

- Initial table population and recovery

    The connector can also be used to generate a CSV file for import via Worldox Admin or by a scheduled event on the Worldox indexer. This is useful for the initial population of tables during install or for the rebuilding of tables in the event of table corruption disaster recovery etc.

- Closed matter handling:

    In addition to keeping the client matter tables up to date for users to be able to profile documents the connectors have the ability to mark the description fields of closed matters to alert users to their closed status to deter them from profiling new documents against closed matters.

    The connectors can also apply document retention criteria to the codes of closed matters.

    Once retention criteria have been applied to the closed matter codes Worldox automated or manual archiving can be used to move all documents associated with closed matters into archive on a regular basis ensuring system efficiency.

System Requirements:

The connectors will run on Windows XP, Vista and Windows 7. Windows XP Pro is the recommended platform. Any PC which meets the requirements for a Worldox Indexer or Client should be suitable.

With Microsoft SQL based systems such as Elite and Juris the necessary components for querying the databases should be included in the operating system.

In the case of Omega it will be necessary to install an ODBC drive if that is not already installed as part of the Omega configuration.

Database configuration:

If the SQL database is not configured for windows authentication with the workstation login account having read access to the database tables then it may be necessary to create a database account with read permissions on the relevant tables.

The connection to the SQL database may be via a suitably configured DSN for direct access or by a defined ODBC link. The Omega connector only operates using an ODBC connection via the relevant driver for the CACHE database.

Pricing:

These "Level 1" Client/Matter Connectors will be sold on a one time site licence of $1,500 with an annual maintenance cost of $300 per year for product support and upgrades.

Notes:

Other Billing systems:

The connector is configurable by Worldox Technical consultants to work with other SQL based billing systems. If your site is using a different billing system as a source of client matter information then please contact Worldox to discuss your requirements. Our consultants can usually develop a connector very quickly if they can have access to the database to determine the structure and required queries.