



Client Matter Connectors

For Elite, Juris, Omega, AcuminEW,
Rippe, Lawbase, PCLaw etc.

Worldox Quick Client Matter connectors

Purpose:

To facilitate the frequent updating of Worldox profile tables with information from billing and practice management systems such as Elite, Juris, PCLaw, Rippe & Kingston, Omega, AcuminEW, Aderant, special File imports and others where the vendors do not provide native integration.

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 connectors can 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.

Notes:

System requirements:

The connectors will run on Windows 7, Vista or Windows 10 as well as Server 2008 and onwards. 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.

See Appendix for special considerations for Omega, AcuminEW, Lawbase and PCLaw

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.

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.

File Connector: For those systems that are not supported but which have a reporting system which can export the required data on a regular basis we have a file connector. This connector can handle the Unicode file formats and different field separators (such as the pipe | symbol) that some systems produce. This connector is an enhancement over the standard Worldox table import facilities as it can handle closed matters and the application of retention information in the same way that the other connectors do.

Appendix: Special considerations for particular systems:

PCLaw: A special 32 bit ODBC driver for the Faircom database will need to be purchased from Faircom or from the PCLaw reseller and installed on the Indexer workstation in order to implement this connector where the SQL version of PCLaw is not in place.

Rippe & Kingston. R&K is usually hosted off-site and will need the R&K technicians to install an ODBC driver for IBM DB2 and a VPN connection to their offsite database in order for the connector to work

AcuminEW. The vendors of the Acumin system will need to install their Acumin EW add-on if this has not been installed previously as it is this add-on that provides the table data for the connector. They may make a charge for this service.

Lawbase: Lawbase will need to install special triggers and filters on their database so as to populate a special table for use with our connector. They may make a charge for this service.

Omega: The Omega connector will require the installation of an ODBC driver which is not included in the connector download. Usually all that is needed is to install the Omega client on the Indexer PC