

Qconnector

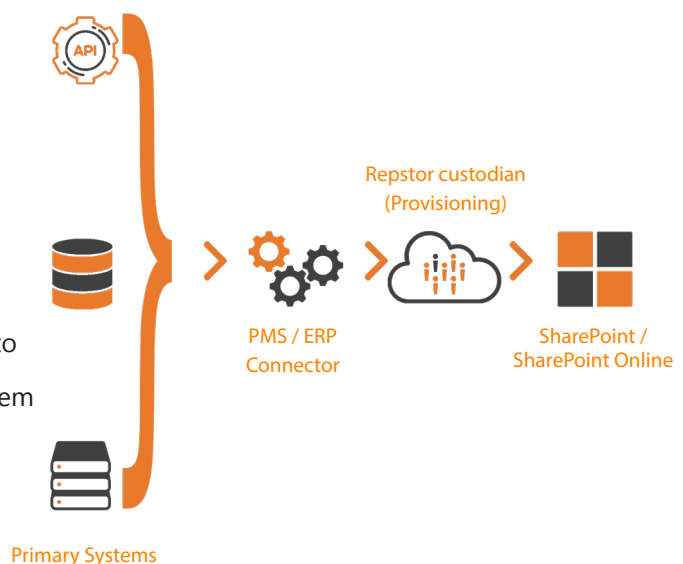
CONNECTING YOUR MASTER DATA



Connecting primary systems
(PMS / ERP / Financial) to your
case management system to
ensure information alignment

—
If your clients and case details are already captured in your primary management system, why should you risk manual information alignment in your case management system?

Transform Data's Qconnector provides a simple, straightforward way to create and manage data communications between your primary system (PMS / ERP / Finance) and Matter Management (Repstor custodian). It allows organizations to streamline IT data architecture and ensure master data is aligned across various systems.





Key Features

- Extracting data from SQL Databases or REST-API from various primary systems
- Support for additional logic or rules, allowing custom translation between systems
- Provisioning structures in Share-Point and/or Microsoft Teams via Repstor custodian
- Monitor provisioning engine for progress and ensure successful completion of the provisioning
- Monitor the primary system for changes and process updates (name, meta-data, status, etc.) towards the matter management system
- Support automatic archiving process for closed matters
- Administrative notifications in case of interruptions
- Statistic information which can be used for reporting (BI)

Typical use-cases

- Automatically provision workspaces for clients and matters that are registered in a leading financial system.
- Automate the meta-data updates from a primary system towards your matter management system.
- Ensure closed matters are archived (made read-only) in the matter management system and optional retention policies are activated.
- Inform relevant users or team members when changes are detected in the leading system.

Common Integration

Qonnector is actively being used for integrations with the following systems:

- Aderant
- Elite
- SAP
- SAP Business ByDesign
- Dynamics
- Advisor
- Vertec
- Effects / Legisway
- LegalSense
- Kleos
- + Additional systems can easily be integrated via SQL or REST-API.

Custodian Integration

Qonnector uses Custodian powered by Intapp applications to provision any SharePoint, Teams or Planner object based on events within the primary system.



Microsoft Power BI

Qonnector keeps track of provisioning activities, statuses and interruptions. This information can be used by Microsoft Power BI for reporting purposes.



Windows Server 2012
or later



SQL Database 2014
or later



SharePoint Online /
Microsoft 365



Mail Provider
(Sendgrid or SMTP)



.NET Framework
4.6.2 and later