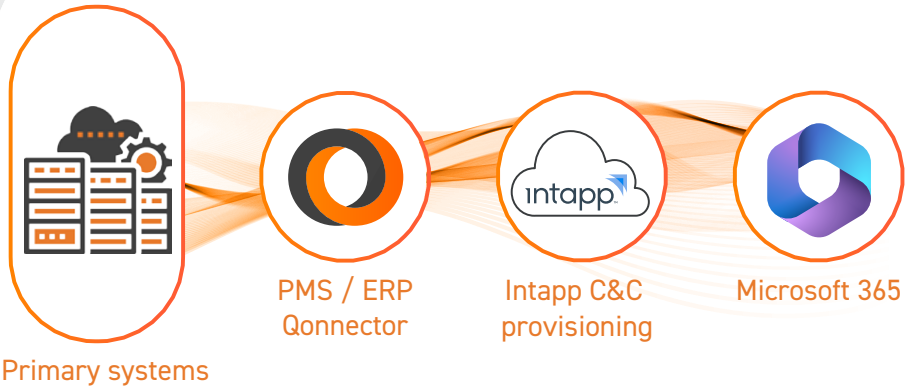


CONNECTING YOUR MASTER DATA



Qconnector

**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, straight-

forward way to create and manage data communications between your primary system (PMS / ERP / Finance) and our Matter Management solution. It allows organisations to streamline IT data architecture and ensure master data is aligned across various systems.

Key features

- Extracting data from SQL Data-bases or REST-API from various primary systems;
- Support for additional logic or rules, allowing custom translation between systems;
- Provisioning structures in SharePoint and/or Microsoft Teams via Intapp C&C;
- 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;

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.

Microsoft Power BI

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

Common integration

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

- Aderant
- Salesforce
- Elite
- SAP
- SAP Business ByDesign
- Dynamics
- Advisor
- Vertec
- Effects / Legisway
- LegalSense
- Kleos

+ Additional systems can easily be integrated via SQL or REST-API.



Intapp Documents

Qconnector uses Intapp Collaboration and Content suite to provision any SharePoint, Teams or Planner object based on events within the primary system.



Windows 8
and later



SQL Database 2014
or later



SharePoint Online/
Microsoft 365



Mail Provider
(Sendgrid or SMTP)



.NET Framework
4.6.2 and later