



Administrator User Manual

[Overview](#) — Includes frequently asked questions.

Tables

Quest is a table-driven case management system. Meaning that the different areas of Quest have drop down lists that show the user the list of options from that particular table.

[Authority](#)

Allows you to give specific authority to security groups. Authority is Add, Edit, Delete & View.

[Authorized Schools](#)

Used to give a person access to specific schools only. A child must be attending that school for this person to be able to view information about that child.

[Chart of Accounts](#)

This is where the financial accounts are stored and configured.

[Courts](#)

This is where you configure the different courts or calendars. You can set up schedules and.

[Deadline Rules](#)

Allows you to automatically add deadlines or “to-do” items when specific things happen.

[Generic Validation Tables](#)

This is where every drop-down menu item is stored and where specific defaults for each jurisdiction can be configured.

[Default Tables](#)

[Policy Rules](#)

[Requirement Phase Items](#)

Requirement Transaction Types

This is not an area you can configure, it is used by the programmers only.

[Requirements](#)

This area is where you configure the different requirement types and codes.

[Adding Program Requirements](#)

[Rules](#)

This area is where you can configure the different rules to help your system do tasks automatically.

[Scheduled Jobs](#)

This is where you run different reports automatically.

Statutes

You can NOT change this table, it is consistent throughout the State. Please contact Gottlieb & Wertz if you need a statute added or changed.

[Templates](#)

This is where you configure the templates that produce the documents in Quest.

[Minor Fixes](#)

[Template Functions](#)

[FF Update](#)

Time Codes

You can configure a time clock system for your employees.

Miscellaneous

[Financial](#)

Local Options

[Custom Queries](#)

[Reports](#)

[Wizards](#)

Processes

[Adding/Removing Employees](#)

[Expunging a Case](#)

[Removing Names Associated with the Case](#)

[Moving a document from one case to another](#)

[Viewing who is currently logged on and kicking them off if necessary](#)

[Elected Clerk Changes](#)

[Elected Judge Changes](#)

[Merging People](#)

[Merging Cases](#)

[Installing a Topaz Signature Pad](#)

[Capturing a Signature](#)

[Sharing Templates with other counties](#)