


Create Document Packet

Report Description:

- New report that combines all of a person's or case's documents into a single PDF that can be sent out.
- If your password is provided, it will also include related person detail, history, and CCS screens.
- Note, may take several minutes to complete as all documents and attachments must be converted to PDFs and combined.

Running the Report:

- Names associated with the case				Top
Name	Case	Role	Start date	
 Laura Wilder (2)	1	Defendant	11/11/2020 22 days	

Laura Wilder is file (2) and her case is 1.

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Enter report criteria and press "Submit"

NOTE: Either file number and/or case number are required

File Number:

Case number:

Password (if you want screens too):

The Report:

The report comes to you in your messages, just like usual, as a .pdf document.

Messages Karlene Thompson

Delete	Message	Status
	Add a new message	
<input type="checkbox"/>	Output Create document packet is ready for viewing. --> Added by Karlene Thompson on 12/2/2020 1:13:58 PM	--Select--
<input type="checkbox"/>	Job successful - DOCUMENTPACKET Start: 12/2/2020 1:13:49 PM; End: 12/2/2020 1:13:58 PM; Return code: 0. --> Added by Karlene Thompson on 12/2/2020 1:13:58 PM	--Select--

Click on the "Create document packet" to open the report.

You can save the .pdf document on your computer and attach it to an email to whomever. Remember that this can be a very large .pdf document if there is a lot of history. Most email servers will reject an email that is too large, so you may need another way to get the packet to them. You could save it on a flash drive, you could put it in dropbox or some other file sharing software.

If you put in your Quest password, the Person Detail screen, List History screen, and Chronological Case Summary are all included as well as all the documents. If you go NOT put in your Quest password, only the documents will appear.