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## Quandis Excel Plug-In User Guide

### Revision History

Date	Author	Version	Description
5/1/2012	A. Walker	1.0.0	Original
5/15/2012	G. Kent	1.0.1	Formatting Updates
5/24/2012	A .Walker	1.02	Pacer Search

### Overview

This document serves as a user guide for using the Quandis Data Services Platform (QDS) Microsoft Excel © Plug-In.

It is written for end users, consultants and other technical professionals interested in integrating with QDS.

Further information about QDS, including latest information, schemas, registration and the software development kit is all available via the web. Please contact [services.support@quandis.com](mailto:services.support@quandis.com) or the Quandis web site (available at <http://www.quandis.com/>).

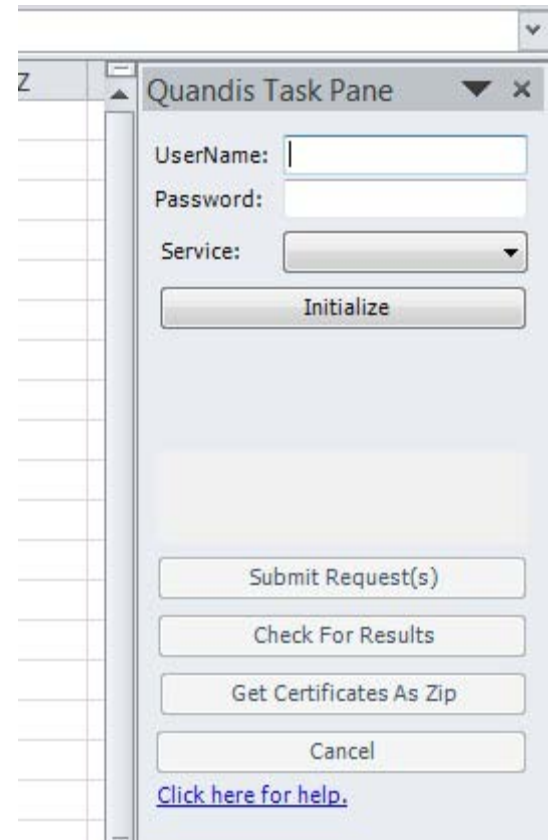
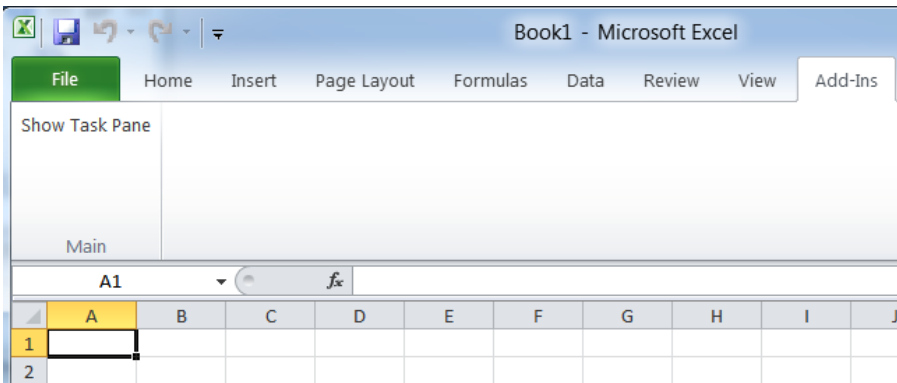
### Installation

1. Download the zip file from <http://www.quandis.com/serv-plugin.asp>
2. Open the zip file and run the setup.exe
3. Follow the instructions on the installation wizard.
4. When the installation is complete start MS-Excel.

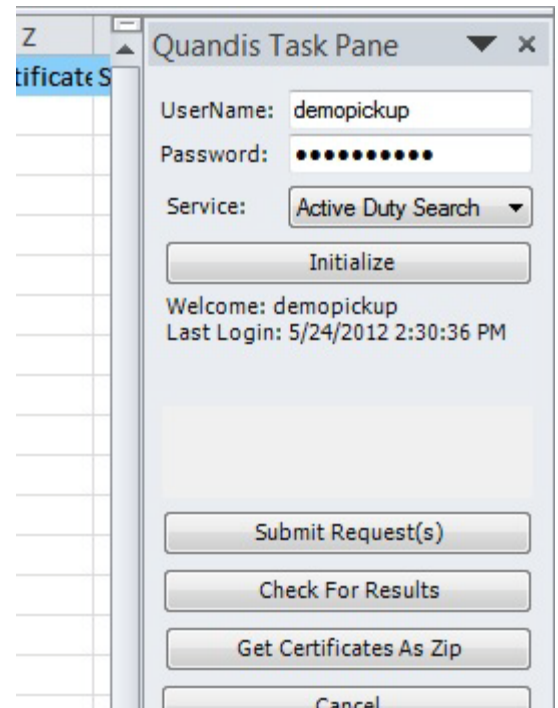
**QUANDIS EXCEL PLUG-IN USER GUIDE****Logging In**

When the plugin is loaded a Quandis Task Pane will appear with **UserName** and **Password** text boxes.

If the task pane does not appear click the “Add-Ins” menu tab and then click the “Show Task Pane” link and the Task Pane will be displayed.



Clicking on the “**Initialize**” button will submit the login credential values to Quandis. If the data provided is valid a welcome message and the last login date will be displayed. The input and output fields will also be populated on the spreadsheet.



## Active Duty Search

### Excel Fields

- TrackingID
  - This is a response field. It is the Quandis tracking ID and will be automatically added to a record after an order has successfully been created via the web service.
- CaseKey
  - This is a user input field. This is used as an additional method of tracking a record. The value in this field will be used when creating the certificate filename.
- LoanNumber
  - This is a user input field.
  - Note: CaseKey or LoanNumber must be provided for each record to be submitted to Quandis.
- FirstName
  - This is a user input field. This field is required if a USSSN is not provided
- MiddleName
  - This is a user input field.
- LastName
  - This is a user input field. This is a required field.
- USSSN
  - This is a user input field. This is a required field if a complete address is not provided.
- BirthDate
  - This is a user input field. This is a required field if neither a USSSN nor a complete address can be provided.
- Address
  - This is a user input field. This field is required if a USSSN is not provided.
- City
  - This is a user input field. This field is required if a USSSN is not provided.
- PostalCode
  - This is a user input field. This field is required if a USSSN is not provided.
- State
  - This is a user input field. This field is required if a USSSN is not provided.
- BorrowerType
  - This is a user input field. The value in this field will be used when creating the certificate filename.
- DateOfInterest
  - This is a user input field. When supplied it is used as the “date of interest” for DoD searches.
- USSSN4
  - This is an output field. It is the last 4 digits of an alias’ social security number.

**QUANDIS EXCEL PLUG-IN USER GUIDE**

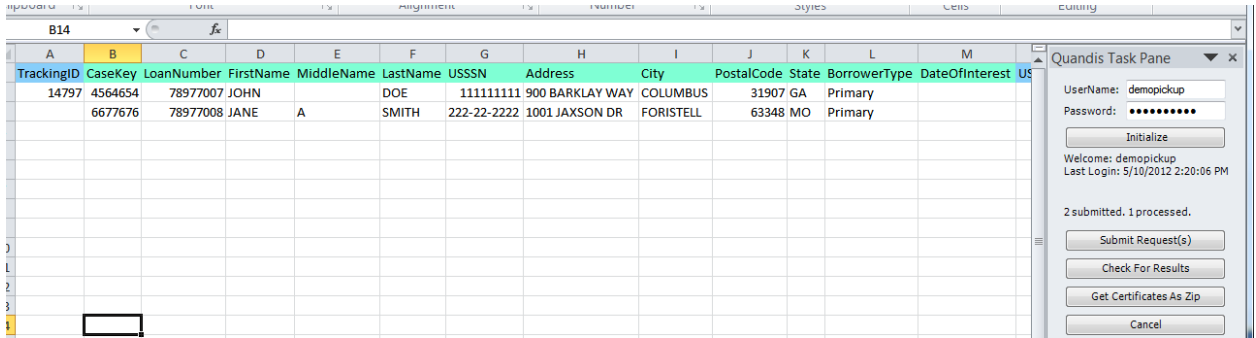
- Notes
  - This is an output field. This field contains notes and alerts pertaining to the record being searched.
- Type
  - This is an output field. It indicates whether the results returned were for an original record or an alias.
- AliasValidStart
  - This is an output field. It is only returned when an alias search is conducted. This is the earliest date associated with the address provided for an alias. This value is a good indicator of the period of time when an individual resided at an address.
- AliasValidEnd
  - This is an output field. It is only returned when an alias search is conducted. This is the most recent date on which the address was believed to be current for an alias. This value is a good indicator of the period of time when an individual resided at an address.
- Status
  - This is an output field. It indicates the current military status of the individual searched.
- Effective
  - This is an output field. This is the Start Date of the individual's military service
- Expires
  - This is an output field. This is the date the individual was discharged.
- VerifiedDate
  - This is an output field. This is the date the individual's military status was checked.
- DODReportID
  - This is an output field. This is the unique identifier from the PDF certificate provided by the DoD.
- Branch
  - This is an output field. This is the branch of the military that the individual is assigned to.
- CertificateURL
  - This is an output field. This a hyperlink to the certificate provided by the DoD.
- SearchProviderResultsFound
  - This is an output field. This field indicates whether or not information could be obtained for an individual for whom a USSSN was not provided.

## QUANDIS EXCEL PLUG-IN USER GUIDE

### Creating an Order

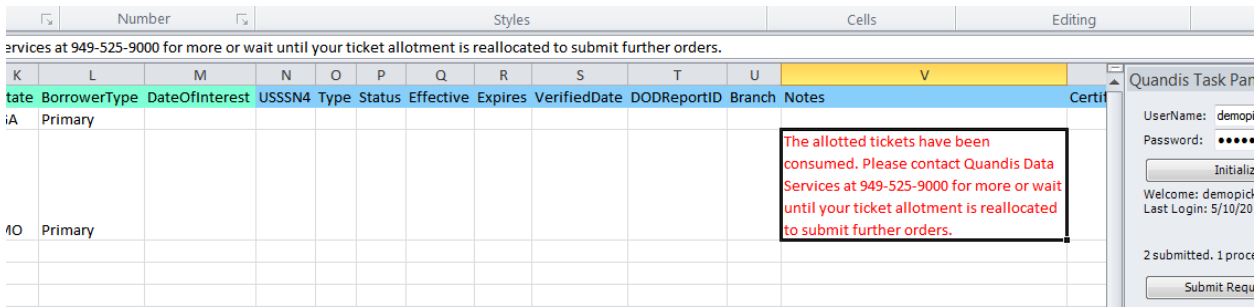
To submit an order a CaseKey or LoanNumber, LastName, and USSSN must be provided at a minimum.

If a USSSN is not available a CaseKey or LoanNumber, FirstName, LastName, Address, City, State, and PostalCode must be provided. If the account is set up for alias searching an attempt will be made to obtain a corresponding USSSN for the individual and a DoD search will be conducted with it.



The screenshot shows an Excel spreadsheet with columns: TrackingID, CaseKey, LoanNumber, FirstName, MiddleName, LastName, USSSN, Address, City, PostalCode, State, BorrowerType, DateOfInterest. The data includes two rows of information. A 'Quandis Task Pane' is open on the right, showing a login form with fields for Username (demopickup) and Password (masked with dots), and buttons for Initialize, Submit Request(s), Check For Results, Get Certificates As Zip, and Cancel. It also displays a welcome message and login history.

When the **“Submit Request(s)”** button is clicked a DoD search will be conducted for each record in the spreadsheet with the required fields. If a search does not generate any errors then a TrackingID will be returned. If an error occurs then a description of the error will be returned to the notes field.



The screenshot shows the same Excel spreadsheet with an error message in the 'Notes' column of the second row. The error message is: "The allotted tickets have been consumed. Please contact Quandis Data Services at 949-525-9000 for more or wait until your ticket allotment is reallocated to submit further orders." The 'Quandis Task Pane' is also visible on the right.

**QUANDIS EXCEL PLUG-IN USER GUIDE**

**Checking For Orders**

The DoD search is conducted asynchronously by Quandis. This means that a search will not immediately return results. When a search generates a valid order a TrackingID is returned. Clicking the “**Check For Results**” button will submit the records with a TrackingID, and which have not yet received results, to Quandis. If the search has successfully been completed the results will be returned and populated the spreadsheet accordingly. In the event that a search has not yet been completed an appropriate message will be returned to the Notes field. The user may wait a few seconds then check for more results. Typically a search with a USSSN will only take a few seconds to complete. A search without a USSSN may take a minute or two.

TrackingID	CaseKey	LoanNum	FirstName	MiddleName	LastName	USSSN	Address	City	PostalCod	State	Borrower	DateOfInet	USSSN4	Type	Status	Effective	Expires	VerifiedData	DDDRRepo	Branch	Notes	Certificate SearchProvid
14798	1	1	JOHN	JEFFREY	DOE	111111113190	BARKL	COLUMBU	31907	GA	Primary		1111	Original	Discharged	05/12/2011	05/10/2012	RSHR599G	Army	Left Active Duty Within 36	<a href="#">1DODYPrimary.pdf</a>	
14800	3	3	JANE		SMITH	22222222456	ASHLE	RIVERVIE	33578	FL	Primary		2222	Original	Discharged	12/31/2011	05/10/2012	3TFCB0PP	Air Force	Left Active Duty Within 36	<a href="#">3DODYPrimary.pdf</a>	
14801	4	4	JUDY	WILLIAM	JACKSON	333333332213	WAL	NORTH	PC34287-366	FL	Primary		3333	Original	Active Duty		05/10/2012	B0018CL	Air Force	On Active Duty On Date of	<a href="#">4DODYPrimary.pdf</a>	
14806	9	9	JEFF		WILLIAMS	4444444445454	Sou	Portland	97219	OR	Primary		4444	Original	Not Found		05/10/2012	12GKH0GQ2L			<a href="#">9DODYPrimary.pdf</a>	
14807	10	10	JOSH		WALKER		45444	Peg Port	Oran	32127	FL	Primary										The order is not yet complete or may already have been retrieved. 05-10-2012 14:28:49

**Batch Zips**

Links to the generated certificates are returned along with the search results. A users can click the “**Get Certificates As Zip**” button to return a link to a single zip file containing the certificates for all the completed searches.

U	V	W	X
Notes		Certificate SearchProvid	
	The Zip file contains 4 certificates. Generated at 05-10-2012 02:33:39	<a href="#">PDF Zip File</a>	
Left Active Duty Within 367 Days of Date Of Interest		<a href="#">1DODYPrimary.pdf</a>	
Left Active Duty Within 367 Days of Date Of Interest		<a href="#">3DODYPrimary.pdf</a>	

## Pacer Bankruptcy Search

### Excel Fields

- TrackingID
  - This is a response field. It is the Quandis tracking ID and will be automatically added to a record after an order has successfully been created via the web service.
- CaseKey
  - This is a user input field. This is used as an additional method of tracking a record. The value in this field will be used when creating the certificate filename.
- LoanNumber
  - This is a user input field.
  - Note: CaseKey or LoanNumber must be provided for each record to be submitted to Quandis.
- FirstName
  - This is a user input field. This field is required if a USSSN is not provided
- MiddleName
  - This is a user input field.
- LastName
  - This is a user input field. This is a required field if a USSSN4 is used.
- USSSN
  - This is a user input field. This is a required field if a complete address is not provided. This field may either be a full USSSN or the last 4 digits of a USSSN.
- BirthDate
  - This is an output field. It is only returned when an alias search is conducted.
- Address
  - This is a user input field. This field is required if a USSSN is not provided.
- City
  - This is a user input field. This field is required if a USSSN is not provided.
- PostalCode
  - This is a user input field. This field is required if a USSSN is not provided.
- State
  - This is a user input field. This field is required if a USSSN is not provided.
- BorrowerType
  - This is a user input field. The value in this field will be used when creating the certificate filename.
- ProductType
  - This is a user input field. This value can be "Search" or "Advanced Search". An "Advanced Search" will return bankruptcy related contacts as well as bankruptcy data.



**QUANDIS EXCEL PLUG-IN USER GUIDE**

- Notes
  - This is an output field. This field contains notes and alerts pertaining to the record being searched.
- Type
  - This is an output field. It indicates whether the results returned were for an original record or an alias.
- AliasValidStart
  - This is an output field. It is only returned when an alias search is conducted. This is the earliest date associated with the address provided for an alias. This value is a good indicator of the period of time when an individual resided at an address.
- AliasValidEnd
  - This is an output field. It is only returned when an alias search is conducted. This is the most recent date on which the address was believed to be current for an alias. This value is a good indicator of the period of time when an individual resided at an address.
- USSN4
  - This is an output field. It is the last 4 digits of an alias' social security number.
- BKCaseNo
  - This is an output field. It is the bankruptcy case number
- Chapter
  - This is an output field. This is the chapter the bankruptcy was filed under.
- StateOfFiling.
  - This is an output field. This is the state the bankruptcy was filed in.
- FilingDate
  - This is an output field. This is the filing date for the bankruptcy.
- Court
  - This is an output field. This is the court code for the court handling the bankruptcy.
- Status
  - This is an output field. It indicates the current status of the bankruptcy.
- DateClosed
  - This is an output field. This is the Date that the bankruptcy was closed
- ClosedReason
  - This is an output field. This is the reason the bankruptcy was closed.
- Operation
  - This is an output field. It indicates the type of Pacer search conducted.
- ContactType
  - This is an output field. When a contact is returned during an "Advanced Search" this field indicates the type of contact.

## QUANDIS EXCEL PLUG-IN USER GUIDE

- Contact
  - This is an output field. When a contact is returned during an “Advanced Search” this field contains the contact name.
- ContactAddress
  - This is an output field. When a contact is returned during an “Advanced Search” this field contains the contacts address.
- Phone
  - This is an output field. When a contact is returned during an “Advanced Search” this field contains the contact phone number.
- Email
  - This is an output field. When a contact is returned during an “Advanced Search” this field contains the contact email address.
- Fax
  - This is an output field. When a contact is returned during an “Advanced Search” this field contains the contact’s fax number.
- CertificateURL
  - This is an output field. This a hyperlink to the PDF certificate created from the Pacer website search.
- SearchProviderResultsFound
  - This is an output field. This field indicates whether or not information could be obtained for an individual for whom a USSSN was not provided.

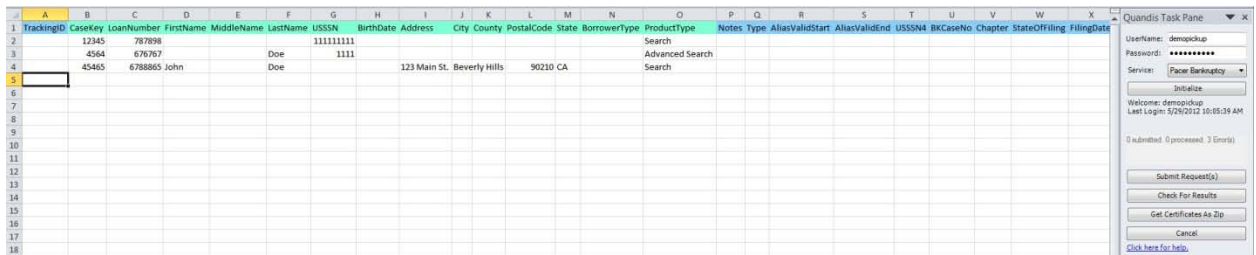
**QUANDIS EXCEL PLUG-IN USER GUIDE**

**Creating an Order**

To submit an order a CaseKey or LoanNumber, ProductType and full USSSN must be provided at a minimum.

If a full USSSN is not available, a CaseKey or LoanNumber, ProductType, LastName, FirstName, and the last 4 digits of a USSSN can be provided instead.

If a USSSN is not available a CaseKey or LoanNumber, FirstName, LastName, Address, City, State, and PostalCode must be provided. If the account is set up for alias searching an attempt will be made to obtain a corresponding USSSN for the individual and a Pacer search will be conducted with it.



TrackingID	CaseKey	LoanNumber	FirstName	MiddleName	LastName	USSSN	BirthDate	Address	City	County	PostalCode	State	BorrowerType	ProductType	Notes	AliasValidStart	AliasValidEnd	USSSN4	BKCaseNo	Chapter	StateOffiling	FilingDate	
12345		787898				111111111								Search									
4564		676767	Doe		Doe	1111		123 Main St.	Beverly Hills		90210	CA		Advanced Search									
45455		6788865	John											Search									

When the “Submit Request(s)” button is clicked a Pacer search will be conducted for each record in the spreadsheet with the required fields. If a search does not generate any errors then a TrackingID will be returned. If an error occurs then a description of the error will be returned to the notes field.

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AliasValidStart	AliasValidEnd	USSSN4	BKCaseNo	Chapter	StateOffiling	FilingDate	Court	Status	DateClosed	ClosedReason	Operation	ContactType	Contact	ContactAddress	Phone	Email	Fax	CertificateUrl	Search
		1111	1:12-bk-11457	7	NJ	01/24/2012	njke	Closed	05/04/2012	Discharge	National							1.3166628.pdf	
		4:08-bk-12345		7	MN	01/08/2008	mbk	Closed	05/01/2008	Discharge	Regional	Pacer Attorney	Derrick C Salmen		123-339-4321	dsalmen@faber.com		3.3166629.pdf	
		4:08-bk-12345										Pacer Trustee	US Trustee	Minneapolis	456-334-1750	usttrustee.mn.ecf@usdoj.gov			
		4:08-bk-12345										Pacer Trustee	John R. Smith	Minneapolis	456-368-5815	jsmith@labra.com			

