

Tips and Tricks: How to get more out of Fortis

Cory Giovanella
Director of Sales

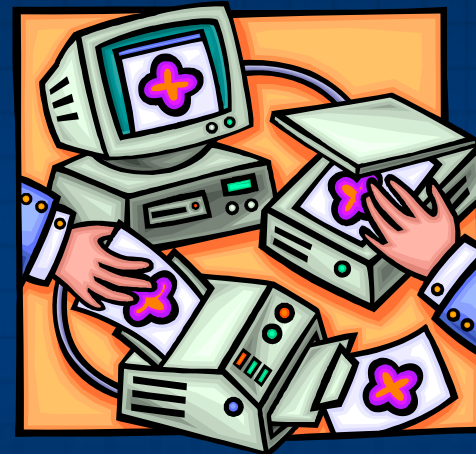
Agenda

- Capture Capabilities
- Document Retrieval Capabilities
- Data Entry Capabilities
- General Shortcuts

Capture

Methods of Capture

- Scan
- Import
- Fax-In
- Print-To-MAG
- Fortis Office
- Virtual Scanner*



Capture Destinations

- In Basket
- Database

Scan

- Utilizes an external scanner to capture documents
- Supported Scanner Drivers:
 - ISIS (Image and Scanner Interface Specifications)
 - TWAIN
- Scan to In Basket or Database
- Can be scripted

Scan Options

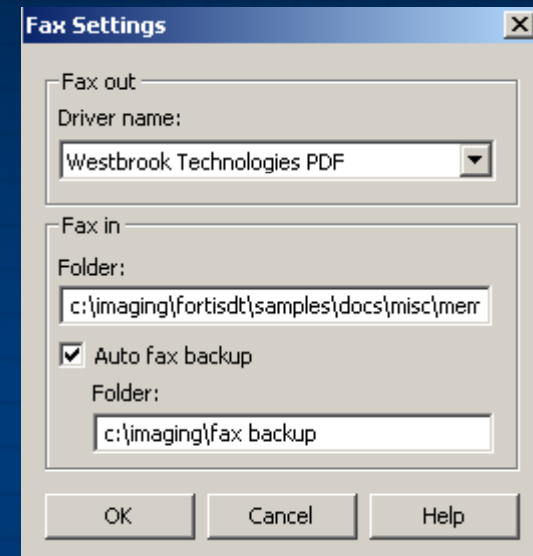
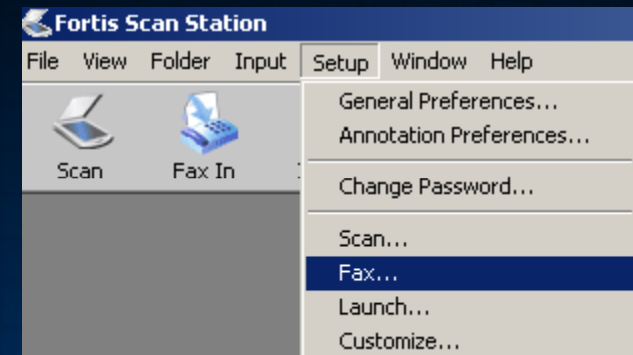
- Blank page separation (w/ threshold setting)
- Preview/ auto accept
- Read bar codes
 - Document separator
 - Populate index fields
 - Trigger Script Manager
- Image Enhancements- improve appearance and character recognition
 - Includes De-Skew, Dot shading removal, horizontal/vertical line removal, inverse text, horizontal/ vertical registration, sand & fill smoothing...

Import

- Capturing electronic files
- Import single or multiple files
- Import to In Basket or Database
- Can be scripted and optionally scheduled
- Can import documents or data & documents

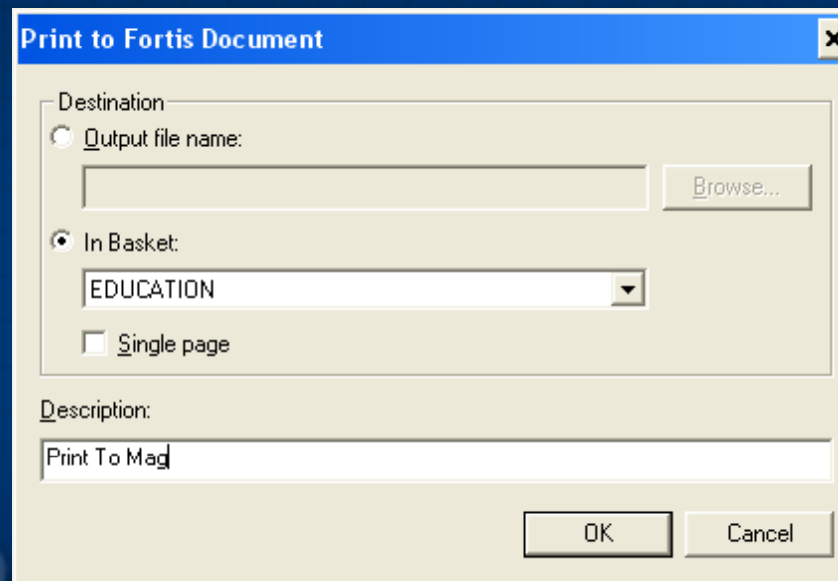
Fax-In

- Pulls fax images into Fortis
- Works with a fax server or fax software
- Can optionally store backups of faxes
- Can pull images to In Basket or Database
- Can be scripted and optionally scheduled



Print-To-MAG

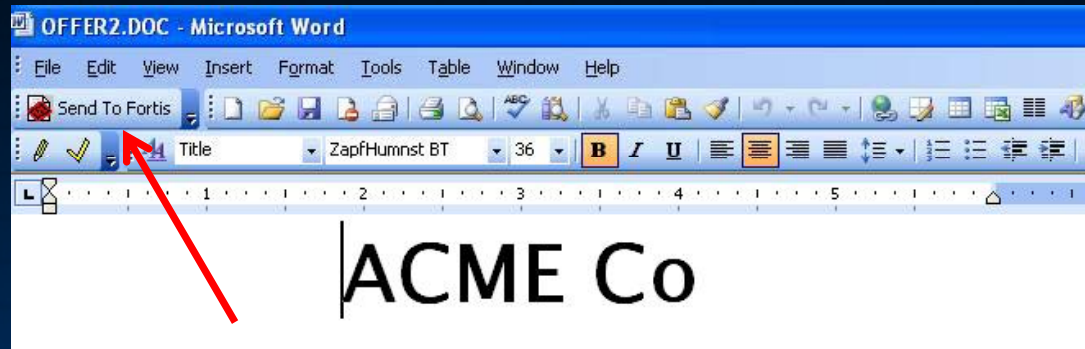
- Fortis Document printer created during Workstation Setup
- Can be used by any software that uses Windows' printer drivers
- Prints to a Windows directory or In Basket as a MAG file



Fortis Office

- Allows files to be pushed into Fortis
- Can include Microsoft Office Properties- over 70 possible fields
- Push from Word, Excel, Outlook, and PowerPoint
- Sends to Fortis in native format
- Drag-and-Drop any file type to a desktop icon
 - Desktop icons can be customized with log-on information, destination information, and/or index data
- Send to an In Basket or Database

Send To Dialog Box

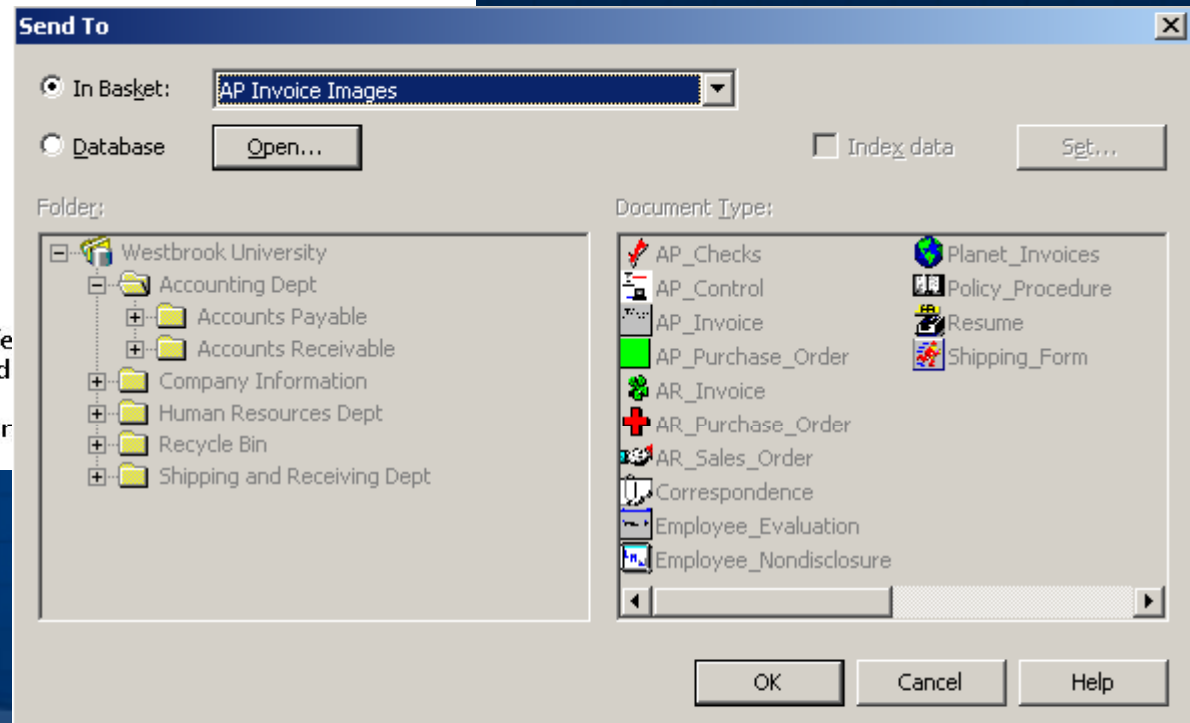


February 20, 1996

Bria Florent
77 Sunrise Blvd.
New London, CT 06320

Dear Bria:

On behalf of ACME Company, I am pleased to offer Support Specialist. This is an at-will position and 5, 1996 at a salary of \$35,500.00. You will report directly to your Super



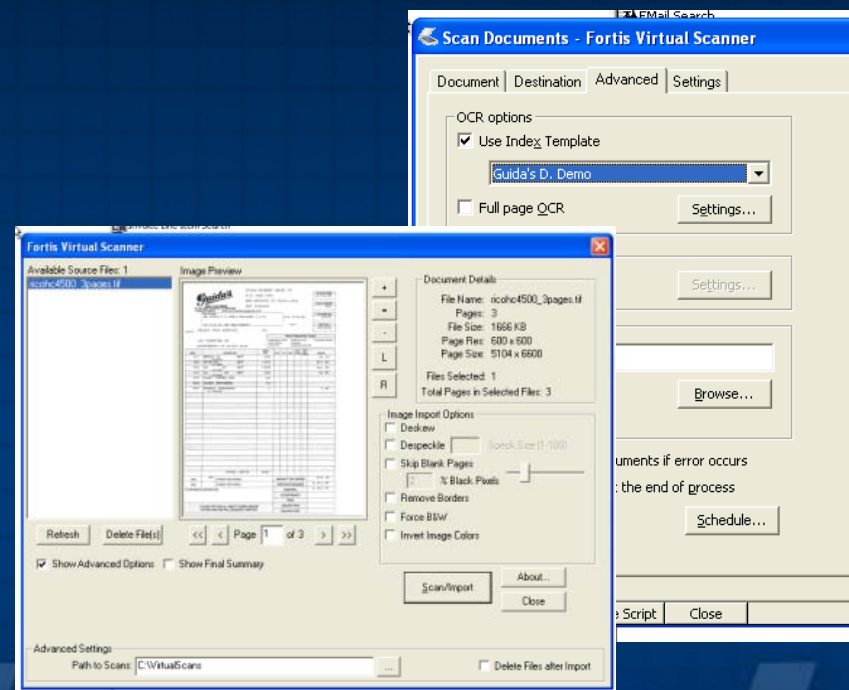
Fortis Virtual Scanner

- **Fortis Virtual Scanner** allows users to turn the MFPs they already own into an invisible scanner on every user's desktop!



Fortis Virtual Scanner

- Fortis Virtual Scanner acts like a physical scanner
- Extends Fortis Scan Station functionality to MFPs and remote users
 - Page separation
 - Image enhancements
 - OCR
- Replaces desktop scanners
- Monitors network folder



Retrieval

Queries

- Query Types
 - Static vs. Variable
 - Equal To vs. Contains
 - Simple vs. Complex
 - AND vs. OR
 - Single Document Type vs. Multiple Document Types
 - Query vs. Browse
 - Index Field Search vs. Full Text Search
 - Date Math
 - Document Association (aka “Electronic Paper Clip”)
 - Annotation (new in v2.4)

Queries

- Query Layout
 - Remove/Add/Insert Columns
 - Sort Data
 - Re-order Columns
- Quick Find Add-on
- DocAlert Add-on

Static vs. Variable

- **Static Queries**

- Static = stays the same
- Search criteria and value do not change
- No user input required to run a Static Query

- **Variable Queries**

- Variable = changing
- Search criteria stays the same
- Search value changes based on user input each time the Query is run

Equal To vs. Contains

- **Equal To**

- Value found must exactly match search value
 - Search for Fortis will not find FortisWeb
- Wildcards can be used to circumvent
 - * = zero to unlimited number of characters: a*b*c*d* will return abcd or abracadabra
 - ? = one and only one character: n??ls?n will find a seven-letter word that begins with N, followed by two characters, then an L and an S, followed by one character, and ending in N. How do you spell Nielsen?

- **Contains**

- Value found must match or contain the search value
 - Search for Fortis will find FortisWeb
- Wildcards can still be used, but are less likely to be needed

Simple vs. Complex

- **Simple**
 - A single search criteria is defined
- **Complex**
 - Two or more search criteria are defined
 - Continuations are used to link the criteria
 - AND and OR are the most common
 - Parenthesis, up to nine nested levels, allow control over order of operation

AND vs. OR

- **AND**

- Narrows the results
- Returns only the items that match all conditions
 - All conditions are met

- **OR**

- Broadens the results
- Returns items that match one or more conditions
 - Any condition is met

Single vs. Multiple Document Types

- **Single Document Type**

- The Query is created to target only one Document Type
 - The Document Type is a single database object, a data table in SQL

- **Multiple Document Types**

- The Query is initially created to target a single Document Type
- Additional Document Types are then added one at a time
- Usually, but not always, the multiple Document Types have a common piece of data, such as a name, date, or identifying number
 - This is useful for situations that call for “binders” or “portfolios”
 - Examples include medical records, HR records, and mortgage or loan applications
- Font in tabs will appear different color if query returns document/s

Multiple Document Query

The screenshot shows a window titled "All Documents - Query Results" with a menu bar containing "Criteria", "Layout", "Results", "Full Text", "Actions", "Refresh", "Open", "Modify", "Save Doc", "Print Doc", "Delete", and "Close". Below the menu bar are three tabs: "Invoices", "Purchase_Orders", and "Delivery_Ticket". The "Purchase_Orders" tab is selected. The main area contains a table with the following columns: "Invoice Number", "Vendor Name", "Invoice Date", "Amount", "PO Number", and "Parent Num". The table is empty, and the text "No results found on this tab." is displayed in the center. At the bottom right, a status bar indicates "0 documents found".

| Invoice Number | Vendor Name | Invoice Date | Amount | PO Number | Parent Num |
|-------------------------------|-------------|--------------|--------|-----------|------------|
| No results found on this tab. | | | | | |

The screenshot shows a window titled "All Documents - Query Results" with a menu bar containing "Criteria", "Layout", "Results", "Full Text", "Actions", "Refresh", "Open", "Modify", "Save Doc", "Print Doc", "Delete", and "Close". Below the menu bar are three tabs: "Invoices", "Purchase_Orders", and "Delivery_Ticket". The "Purchase_Orders" tab is selected. The main area contains a table with the following columns: "PO Number", "Amount", "Document Date", "Sales Executive", "Entered By", and "Entered Dal". The table contains one row of data. At the bottom right, a status bar indicates "1 document found".

| PO Number | Amount | Document Date | Sales Executive | Entered By | Entered Dal |
|-----------|---------|---------------|-----------------|------------|-------------|
| 9333 | \$75.37 | 6/17/2005 | Huy Tran | SYSADM | 08/17/2005 |

Query vs. Browse

- **Query**
 - A saved search
- **Browse**
 - An ad hoc search
 - If the necessary Query does not exist, a Browse can be run
 - A Browse prompts the user to select the Folder in which to search and the Document Type within which to search
 - A Browse prompts for user input by displaying all index fields for the selected Document Type being browsed
 - A Full Text prompt is also included if the Document Type is a Full Text Document Type
 - By default, a Browse performs an Equal To search on entered search value(s)
 - By default, a Browse performs an AND search on entered search value(s)

Index Field vs. Full Text

- **Index Field Query**

- Search criteria is defined to search within the index fields of the specified Document Type(s)

- **Full Text Query**

- Searches a database built from the text content of the documents
- Only operable if
 - The Document Type has been designated as a Full Text Document Type, and
 - There are indexed text-based Assorted Other pages in the documents
- Can be combined with an index field search
- Has several expressions to allow for complex searching

Full Text Expressions

- % - Fuzzy – each % put in the search term, up to nine, represents one letter in the result term that can be different from the search term
 - %com%puter
- ~ - Stemming – placed at the end of the search term, it tells Fortis to locate various forms of the search term where the ending is different
 - Party~ = party, parties, partier, partying
- # - Phonic – placed at the beginning of the search term, it tells Fortis to locate words that sound like the search term
 - Rain = rain, rein, reign
- w/# - Relational – placed between search terms where # is replaced with a number indicating how close the words must be to each other to meet the criteria
 - Network* w/3 direct* = Director of Corporate Networking

Full Text Expressions

- * - zero to unlimited number of characters
- ? – one and only one character
- AND/OR – Boolean searching as seen with complex Queries
- () – Parenthetical control for order of operation as seen with complex Queries

Date Math

- Accessed via the *Edit Value* dialog box in Query criteria
- When the [Date] button is used, the @SYSTEM_DATE@ variable is inserted
- Can be used alone as a static value to find items where the search value is "today"
- Can be used as part of a static equation where the search value is relative to "today", e.g., @SYSTEM_DATE@+1
- Can be used as part of a variable equation where the search value is relative to "today", e.g., @SYSTEM_DATE@+^"Invoices due within the next how many days?"
- Date math calculates days only

"Electronic Paper Clip"

- Allows for quick retrieval of records associated with open document
- User is able to seamlessly get from one doc type to another
- Same security permissions are applied

Fortis Edit Station - [Document in Folder Student Records of Type Transcript]

File Edit View Template OCR Link Input Setup Window Help

Open DB Queries In Baskets Import Fax In BatchIndex ImportData Prefs Annotate Help

1 of 1

Student Name: Sue Ellen Mishky
Student ID: 613000466
Grade: 12
Gender: F
Birth Place: Goshen, IN 46526
Date Of Birth: 04/03/66

Parent/Guardian: Lillian Mishky
1241 Bryen Place
Goshen, IN 46526
555-831-2242

Franklin Jr/Sr High School
Transcript
Enter Date: 08/24/99
Leave Date: 2005
Class Of: 2005

School Name/Address: Franklin Jr/Sr High School
215 Main Street
Goshen, IN 46526
Tel: 555-831-2184 Fax: 831-2187

| Crse ID | Course Title | Mk | Ab | Credit | Crse ID | Course Title | Mk | Ab | Credit | GPA Summary |
|---|--------------|----|----|--------|---------|--------------|----|----|--------|-------------|
| Fairfield Jr. Sr. High School Grd 09 02001 Term: 2 0401 SUMMER P.E. E 0.600 Crd Act: 0.900 Cmp: 0.900 Academic GPA: 2.700 | | | | | | | | | | |
| Fairfield Jr. Sr. High School Grd 09 12201 Term: 1 0500 HONORIC ART C+ 1.000 0751 CHILD DEV I C+ 1.000 1003 RES. EVG 9 E- 1.000 1206 RES HS MATH C+ 1.000 1210 RES HS SC D- 1.000 Crd Act: 6.000 Cmp: 6.000 Academic GPA: 2.990 | | | | | | | | | | |
| Fairfield Jr. Sr. High School Grd 09 02002 Term: 2 0500 HONORIC ART C+ 1.000 0751 HONORIC PHYS A 1.000 0751 FAM RELATION T+ 1.000 1003 RES. EVG 9 B- 1.000 1206 RES HS MATH C+ 1.000 1210 RES HS SC D 1.000 Crd Act: 6.000 Cmp: 6.000 Academic GPA: 2.500 | | | | | | | | | | |
| Fairfield Jr. Sr. High School Grd 11 12094 Term: 1 0126 REG. ENG 3 D+ 1.000 0551 CON BAND/DIX A 1.000 0862 US PROCESS C 1.000 1108 RES HS MATH 1 B 1.000 1201 RES ENG 11 C 1.000 | | | | | | | | | | |
| Fairfield Jr. Sr. High School Grd 12 02004 Term: 1 0111 LAV/JSC 1051 A- 1.000 0754 ADV. FOODS C- 1.000 1108 RES HS MATH 1 D- 1.000 1201 RES ENG 11 B- 1.000 Crd Act: 7.000 Cmp: 7.000 Academic GPA: 2.843 | | | | | | | | | | |
| Fairfield Jr. Sr. High School Grd 12 12065 Term: 1 0100 ECON/CARDS C 1.000 0603 ICE REL INST C 1.000 | | | | | | | | | | |

Academic GPA: 2.405
Credits earned: 147
Total Credits Attempted: 44.900
Total Credits Earned: 44.900

Testing Information
Prerequisite Tests
STEP/QUE MATH Failed
STEP/QUE ENG Failed

Imported from - Student Transcript2.bmp

Color

Press F1 for Help. SYSADM

start Fortis Edit Station - L... 8:25 AM

Annotations

- Query annotations by type
- Query annotations by text
- TIP- to stay in annotation mode, hold Shift key when selecting annotation

1 of 1

Westbrook Technologies Univ
Invoice

To (name): Smiley Margins
Company: Cisco Networks Inc.
Address: 11 Ten Base T Circle
City/state/zip: Costa Mesa CA 45894
Tel/Fax: 800-CONNECT

Invoice: 215448
Date: 04/02/2001

Please process

The following goods are required by :

| Item | Qty | Description | U/M | Unit Price | Total Price |
|------|-----|--------------------------------|-----|------------|-------------|
| 1 | 12 | Master Network Interface Cards | EA | 235.00 | 2,820.00 |
| 2 | 12 | Ten Base T Hubs | EA | 151.00 | 1,812.00 |
| 3 | 34 | Cables | EA | 8.75 | 297.50 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Student Records Purchase_Requisition

Submitted_By
Submitted_Date
Last_Modified_By
Last_Modified_Date
Document_ID

Annotation_Texts

| | |
|---|------------------|
| 1 | 1-PAID |
| 2 | 1-Please process |
| * | |

Annotation_Types

| | |
|---|------------------------|
| 1 | 1-HIGHLIGHT,NOTE,STAMP |
| * | |

Scanned Document #4 Black and White EDIT

Query Layout

- Remove/Add/Insert Columns
 - *Define Query > Remove* removes a column of data from the Query results
 - *Define Query > Add* adds a currently-not-included column into the Query Results at the last position on the right
 - *Define Query > Insert* adds a currently-not-included column into the Query Results to the left of the selected column
- Sort Data
 - Data can be sorted in Ascending or Descending order
 - Results can not be sorted on Multi-value fields
 - The left-most sorted column is the primary sort key, the next sorted column to the right is the secondary sort key, and so on
- Re-order Columns
 - Columns can be removed then inserted in a new position,
 - Or, select the column heading, hold SHIFT, and drag the column heading to a new position

Query Preferences

- *Preferences* dialog box
 - *Query* tab

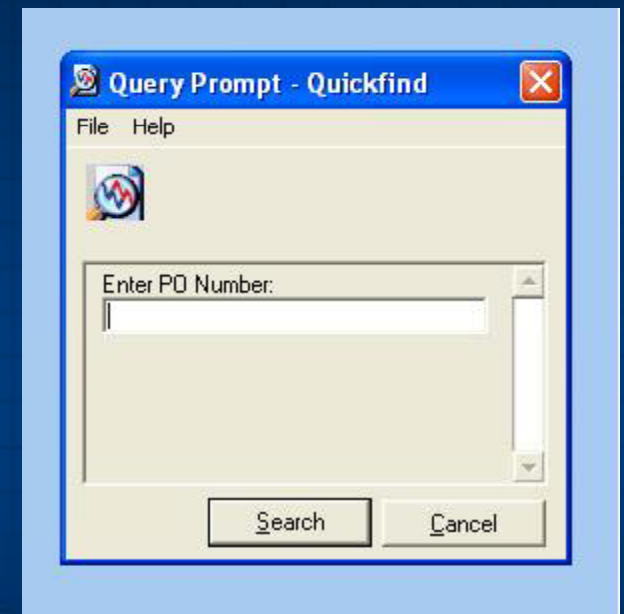
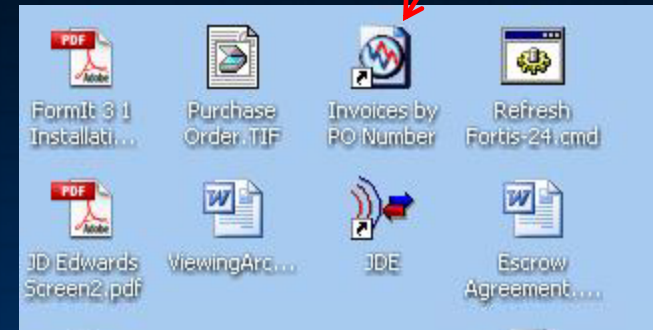
The screenshot shows a 'Preferences' dialog box with a 'Query' tab selected. The dialog box has a title bar with a close button (X) and a menu bar with tabs: Interface, Edit, View, Query, Print, Scan, OCR, and Mail. The 'Query' tab is active, showing the following settings:

- All Queries**
 - Show advanced Query features
 - Auto-refresh modified Query
 - Allow multiple values in variable Query
 - Count number of documents returned
 - Search all Document Type tabs at once
 - Limit number of documents returned:
 - Limit search time: seconds
- Browse**
 - Match whole field
 - Match all values entered
- Full Text Queries**
 - Display number of hits
 - Highlight hits
 - Print hits when printing data

At the bottom of the dialog box are three buttons: OK, Cancel, and Help.

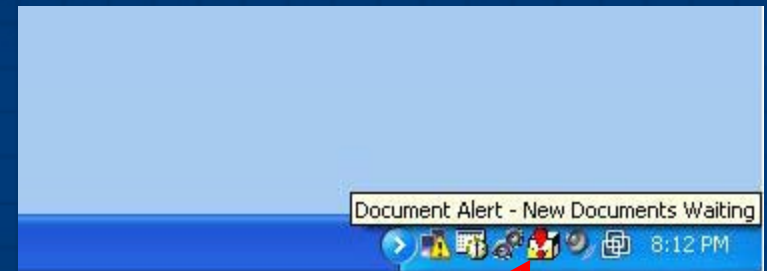
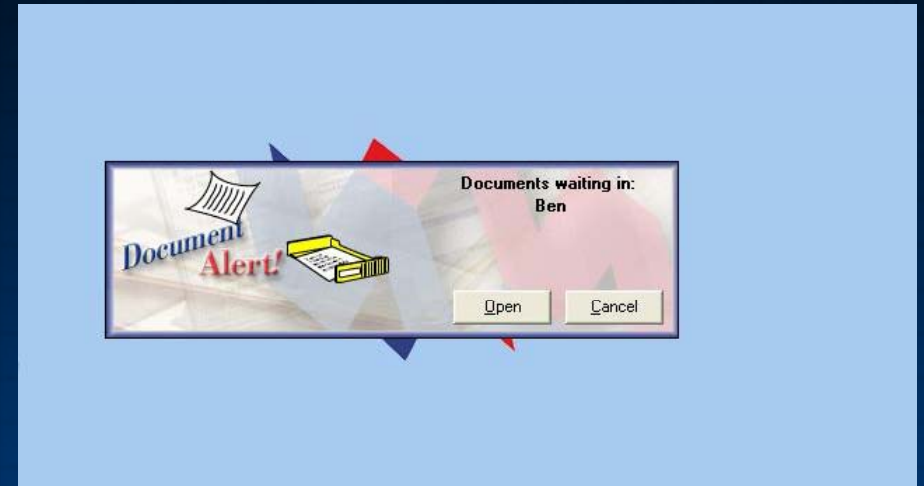
Quick Find Add-on

- Allows Queries to be run from the desktop
- One desktop shortcut can access a single or multiple Queries
- Multiple desktop shortcuts can be created
- Each Query available via Quick Find is configured in a profile
- Profiles can prompt the user to log on or can automatically log on
- Quick Find uses a View Station license that is made available as soon as the user closes the Quick Find viewer
- Saves untold amounts of training time



DocAlert

- Allows user to be notified when new document enters InBasket
- User can receive a visual and/or audio notification and icon in system tray
- One or more InBaskets can be monitored on a workstation
- Customizable notifications
 - Scanned, Imported, Faxed/ Forwarded
 - Check for new doc interval
 - Length of display notification
- Free download



Shortcuts/ Tips & Tricks

- Shift key & select annotation- keeps annotation on
- Ctrl + T- Go to xx document
- Ctrl + G- Go to xx page
- Shift + Left Arrow- Goes to Previous Document
- Shift + Right Arrow- Goes to Next Document
- Ctrl + R- Related Document
- Ctrl + E- Previous Version (version controlled documents)
- Ctrl + U- Pin-Up. Opens next document in separate window

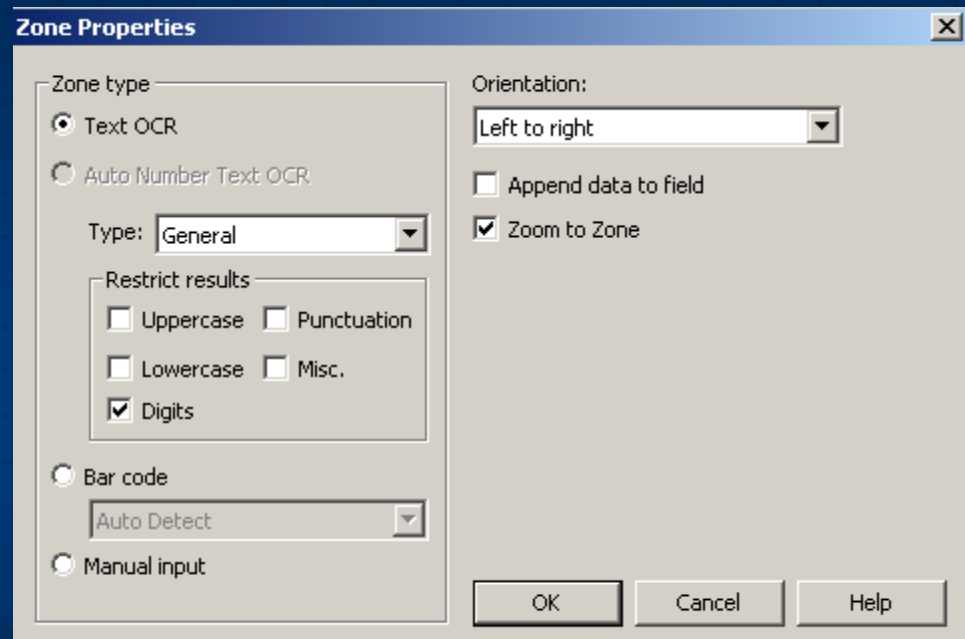
Data Entry

Methods of Data Entry

- Manual
- Manual with Zoom-to-Zone Template
- OCR Template
- BCR Template
- Copy to Field
- File Name Properties
- Microsoft Office Properties
- Data Entry Assistant (DEA)
- Update Assistant (UA)

Templates

- Three types of Templates
 - Zoom-to-Zone for manual use
 - Optical Character Recognition (OCR)
 - Bar Code Recognition (BCR)
- Used on two of the three Fortis page types
 - Black & White Image
 - Color Image



Templates – Zoom-to-Zone

- Speeds up manual data entry by zooming into the areas (or “zones”) of the form associated with each index field
- Helpful on forms that do not lend themselves to OCR
 - Forms filled in by hand, like a W-2
 - Forms that are multiple-generation fax and/or photocopy

Templates – OCR

- Performs OCR on specified zones and places the text into designated associated index fields
- Allows for automated data capture when used...
 - With the Batch Index function
 - On multiple documents opened from an In Basket
 - In conjunction with Scan, Import, or Fax-In
 - As part of a Scan, Import, or Fax-In Script

Templates – BCR

- Performs BCR on specified zones and places the text into designated associated index fields
- Allows for automated data capture when used...
 - With the Batch Index function
 - On multiple documents opened from an In Basket
 - In conjunction with Scan, Import, or Fax-In
 - As part of a Scan, Import, or Fax-In Script
- Bar code zones must include not only the bar code but enough space before and after the bar code
- Bar code zones can include only a strip through the middle of the bar code or can extend to cover the whole page
 - All text will be ignored
- Generally considered faster and more accurate than OCR

Templates – BCR

- Can auto-detect
 - Codabar
 - Code 39
 - Code 128
 - Code 39 EXT
 - Code 93
 - Code 2 of 5
 - Interleaved 2 of 5
 - UPC – A
 - UPC – E
 - EAN – 8
 - EAN – 13
- Can also recognize
 - POSTNET

Copy to Field

- Used on one of the three Fortis page types
 - Assorted Other (only text-based)
- Both the document and index fields must be viewable
- To use Copy to Field
 - Hold CTRL while highlighting the text to copy to a field,
 - Or highlight the text to copy to a field and select *Edit > Copy > To Field*
 - Position the mouse pointer over the destination index field
 - Click

File Name Properties

- Used on one of the three Fortis page types
 - Assorted Other (only text-based)
- Functional only when importing directly to the database
- Fortis Document Type fields must be named appropriately to capture specified file name information

- Based on a file called C:\FOLDER\TEST.DOC the following holds

| <u>Index_Field_Name</u> | <u>Index_Value</u> |
|-------------------------|--------------------|
| File_Full_Name | c:\folder\test.doc |
| File_Name | test.doc |
| File_Location | c:\folder |
| File_Base_Name | test |
| File_Extension | doc |

Microsoft Office Properties

- Used on one of the three Fortis page types
 - Assorted Other (Microsoft Word, Excel, Outlook, and PowerPoint only)
- Must have installed Fortis Office during Workstation Setup
- Functional only when importing directly to the database or using Fortis Office to push directly to a database
- Examples of properties include
 - Outlook Word, Excel, PowerPoint
 - To Title
 - From Subject
 - Subject Author
 - CC Comment

DEA & UA

- Data Entry Assistant
 - Allows connection to an external ODBC data source for automatic population of index fields
 - Requires one or more pieces of data be entered in Fortis - key field(s)
 - Invoked manually, one document at a time, during "data entry"
 - Used on new or existing Fortis documents
- Update Assistant
 - Populates index fields with data from an ASCII file
 - Requires a Fortis Query with layout to match data order to the ASCII file
 - Can be scripted and optionally scheduled
 - Used on existing Fortis documents

Shortcuts/ Tips & Tricks

- Select first document to index, then hold Shift and select last document- allows you to open all documents at once to index.
- Select "Use Enter to save on last field" if indexing multiple documents
- Ctrl + L- Custom launch. Opens another application from Fortis.
- Move Window buttons to the top
- Select "Retain index data after save" if applying the same metadata to multiple documents

General Shortcuts

| Shortcut Key | Function |
|--------------|-------------------------|
| Ctrl + S | Save |
| Ctrl + F4 | Close |
| Ctrl + P | Print |
| Ctrl + F | Fax |
| Alt + F4 | Exit |
| Shift + F5 | Cascade Windows |
| Shift + F4 | Tile Windows Vertically |
| F1 | Help Contents |
| Ctrl + C | Copy Page |
| Ctrl + V | Paste Page |
| Ctrl + B | Burst Page |
| Ctrl + X | Cut Page |

| Shortcut | Function |
|--------------|------------------------|
| Ctrl-A | Select all records |
| Ctrl-D | Opens selected records |
| F5 | Refreshes the query |
| Shift-End | Jumps to last page |
| Shift-Home | Jumps to first page |
| Shift-PageDn | Jumps to next page |
| Shift-PageUp | Jumps to previous page |

Questions?