



Westbrook Technologies' Professional Services

Fortis Integration and Customization Workshop

Background

As technology continues to evolve, companies realize the benefits of integrating their primary business applications. To achieve greater levels of flexibility and productivity a companies Customer Relationship Management (CRM) package must talk to their Enterprise Resource Planning (ERP) system and conversely, their ERP system must communicate with their financial and accounting software packages.

As a result of this trend, and as a major piece to the puzzle, document management must also be configured into the mix. Companies realize the importance of establishing a document-centric solution to image enable and distribute data to and from their business applications. Whenever there is a need for a document, the **Fortis** document management solution can be called with the many tools and techniques discussed in this unique workshop.

Overview

Many clients have the skills in-house to develop a customized solution but without knowledge of the **Fortis** product, its various components, integration techniques and table design, it is difficult to develop a workable solution.

The concept of this workshop is a unique one, developers learning from developers. This approach offers hands-on technical instruction providing the skills necessary to integrate and customize **Fortis**-based solutions. As this is a highly technical workshop, attendees must have strong knowledge of object and web-based programming concepts.

Workshop Fee

One on-site consultant will be provided for three days to instruct up to two people. By the end of the workshop the attendees will have created a sample application and gained a detailed understanding of **Fortis** integration techniques. The course outline is presented below and can be customized to suit your needs. For details please contact Professional Services at 800 949 3453. Note: The option to hold the workshop at Westbrook Technologies University in Connecticut is available. There is a two person maximum per workshop.

Workshop Outline Day One

I. Exploring the Fortis COM API - Breakdown of available Objects and Functions

Application

- Hierarchy
- How to instantiate the object
- Login - licensing and Station types

Database

- Setting database object

Queries

- Execute Query, retrieve results and multi-dimension arrays
- What are Query tabs?
- Pass value to variable Query prompt

Document Types

- Multi-value fields - assigning and setting
- Modifying, setting field values
- Retrieving field names
- Field attributes - Formats, required, unique, size, type, etc

Documents

- Creating new document
- Add page to existing document
- Exporting page - GetData
- Types of pages
- Retrieving document by ID - GetDocument
- Retrieve Docfile path

Folders

- Add document to Folder - AddDocument

Pick Lists

- Pick Lists and Alias

II. Error Trapping and Validation

- How to catch unauthorized access?
- Trapping failed functions

III. Working with the Magview.OCX/Fortis Web ActiveX Control

- Embedding and targeting OCX within a form
- ActiveX object with parameters

IV. Configuration Modules

- Storing administrative settings
- Encrypting password
- Making registry and/or INI settings
- Workstation setup - utilizing InstallInfo registry keys to retrieve the SYSDATA directory

V. Exercise

- Develop Quick Find COM

Day Two

I. Database Utilities and Fortis Table Structure

- **Fortis** table structure - review table map and relationships
- Discuss table definitions
- Integrating with Fortis via ADO/ADOX/ODBC
- SQL Server utilities - Triggers and Data Transformation Services - validation, error checking and automation

II. Exercise

- Build sample database project
 - Create a simple Query - return a result, retrieve index data and document path
 - Place index data into text box and MAG file into OCX control

III. Fortis DDE Server

- Discuss the available commands - Request, Execute and Poke
- Initializing a DDE conversation
- Creating handles
- Passing values through text boxes

IV. Exercise

- DDE Professor

Note: The workshop curriculum can be customized to suit varying knowledge levels and time constraints.

