



## 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.



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