



Enterprise Document Management
for the Mid-Market



FORTIS DOCPACK V3.2

INSTALLATION AND USER GUIDE

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INTRODUCTION

Fortis DocPack is a utility which allows a Fortis user to export data and documents to a portable media. This enables a non Fortis user to gain access to these documents stored on any type of media, or for a Fortis user to access and view the documents offline. Fortis DocPack expands document management functionality through a portable, travel-light utility for projects, presentations, court cases, research assignments, or for simple reference.

PREREQUISITES

Fortis 2.4.1 Service Pack 4

.Net Framework 2.0

Fortis Workstation

RELEASE NOTES

VERSION 3.2

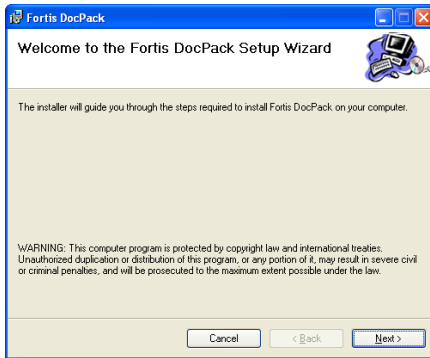
- Consolidated processes so that Fortis DocPack can process while a user continues to use their desktop.
- Added the ability to edit the Fortis DocPack Output Logo and Link to custom brand the Fortis DocPack Output (see Creating a Document Package on page 4).
- Added the ability to export in Original File Format in addition to the existing ability to export in PDF Format.
- Added a progress bar and a counter so a user can see where Fortis DocPack is in the staging process.

INSTALLATION

The installation should be performed on each workstation at which Fortis DocPack creation will be run.

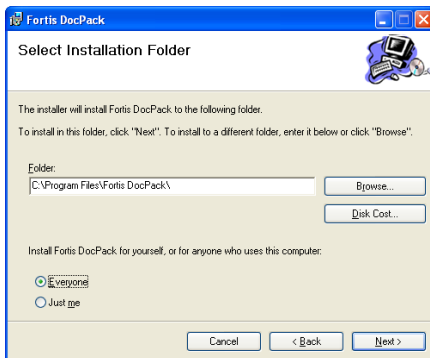
1. Double-click DOCPACKSETUP.MSI, sent when Fortis DocPack is purchased.

- The *Welcome to the Fortis DocPack Setup Wizard* dialog box displays.



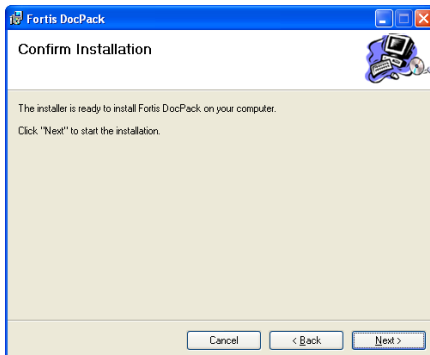
2. Click [Next].

- The *Select Installation Folder* dialog box displays.



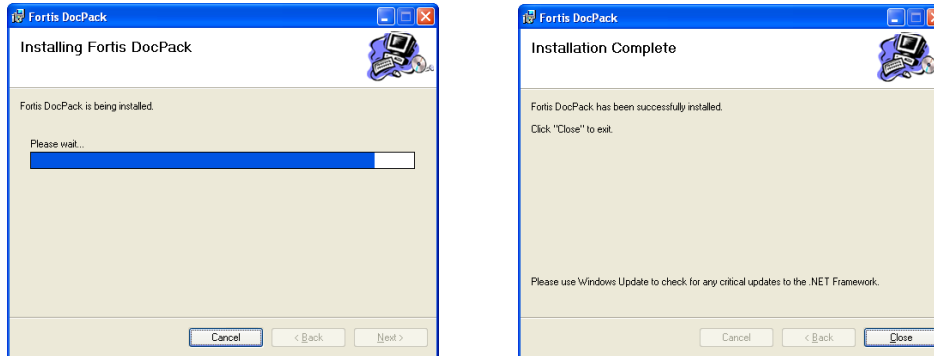
3. Click [Next] to accept the default installation path or enter or click [Browse] to locate an alternate path then click [Next].

- The *Confirm Installation* dialog box displays.



4. Click [Back] to change settings or click [Next] to begin the installation.

- The *Installing Fortis DocPack* dialog box displays during installation, followed by the *Installation Complete* dialog box when the installation has finished.



5. Click [Close].

- The program can be accessed from [Start] > *Programs* > *Fortis DocPack* > *Fortis DocPack* or from the shortcut added to the desktop.

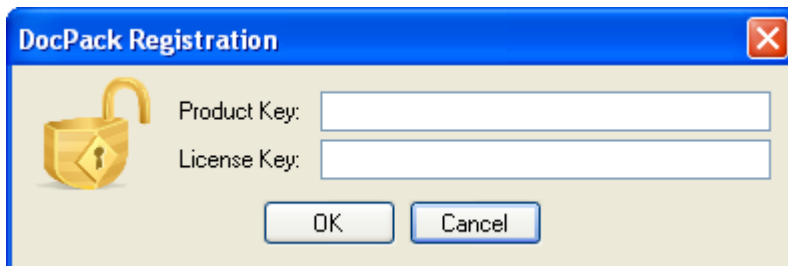


CONFIGURING A WORKSTATION

1. In a Scan Station, Edit Station, or View Station, click the [Prefs] button to access General Preferences.
2. Enable *Count number of documents returned*.
 - This feature is a requirement for the Fortis DocPack product.
3. Click [OK].
4. Execute Fortis DocPack from the desktop shortcut



5. When Fortis DocPack is run for the first time you will be prompted for the Product Key and License Key.



- On Windows Vista, the program should be run under the Administrator account the first time in order for the license keys to be saved. If it is not run under the Administrator account, you will be prompted for the registration information each time the application

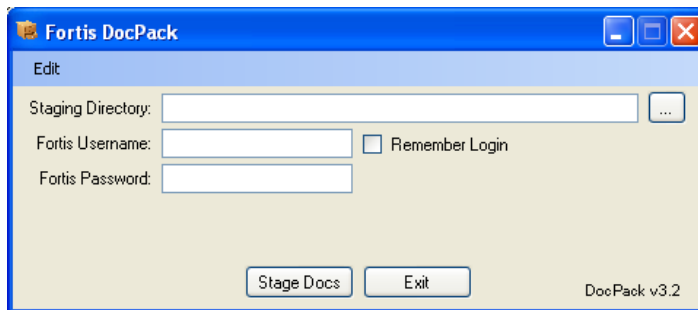
is started. As an alternative, disabling User Access Control (UAC) in Vista will also give correct permissions to the user.

CREATING A DOCUMENT PACKAGE

1. In a Scan Station, Edit Station, or View Station, run a Query to locate the documents to be packaged.
 - This can be a static or variable Query, a simple or complex Query, a single or multiple Document Type Query.
 - Note there is no need to select documents in the Query Result; all documents in the Query Result are packaged.
2. From the desktop icon created during installation, run Fortis DocPack.

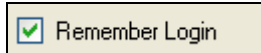


- The *Fortis DocPack* dialog box displays.

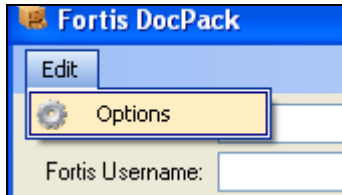


3. In the *Staging Directory* edit box, enter or browse to a local path into which Fortis DocPack will stage the Query Result's documents.
 - If the staging directory does not exist Fortis DocPack will create it when the documents are staged.
 - The staging directory must be empty.
4. Enter a username and password for the Fortis DocPack operation.
 - This User Account must have appropriate permissions set for the Document Type(s) and Folder(s) relevant to the Query, and must have the Documents: Export Database User Feature Access.
 - Fortis DocPack briefly uses a license when performing the export. Use of an Edit license is attempted initially. If no Edit license is available, Fortis DocPack will attempt to use a View license. If no View license is available, Fortis DocPack can not perform the export and the operation is aborted.

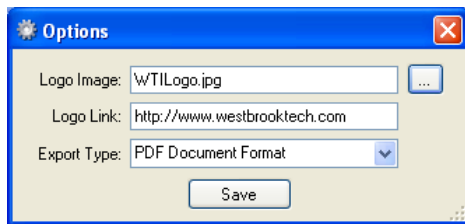
5. Check *Remember Login* if you wish to save the Fortis username and password for the next time Fortis DocPack is executed on this workstation.



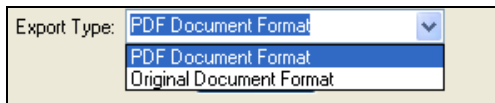
6. To access more advanced Fortis DocPack features, click the *Edit* menu and select the *Options* command.



- The *Options* dialog box displays.

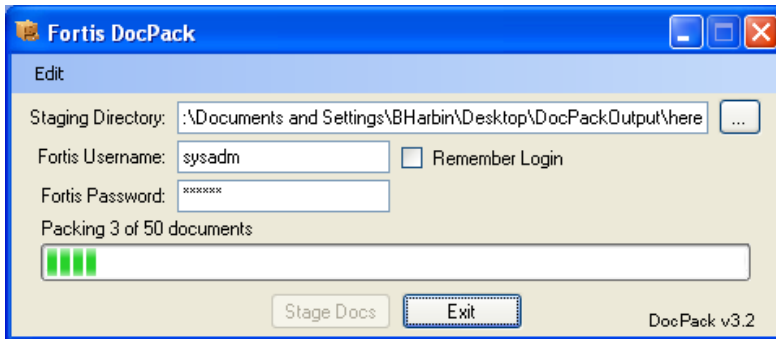


7. In the *Logo Image* field browse to and select a file to custom brand the Fortis DocPack Output.
 - Supported formats include GIF, JPG, PNG.
8. In the *Logo Link* field, specify the Web link associated with the logo image at the top of the Fortis DocPack Output.
9. In the *Export Type* field, select the output format for Fortis DocPack documents.



- Fortis DocPack can convert the documents to PDF or output the documents in their original format.
10. Click [Save] to save all advanced options settings.
 - You are returned to the *Fortis DocPack* dialog box.
 11. Click [Stage Docs].
 - At this time, all settings from the *Fortis DocPack* dialog box are saved locally to be used for the next session.
 - On Windows Vista, the program should be run under the Administrator account in order for settings to be saved. If it is not run under the Administrator account, the dialog box will be empty each time Fortis DocPack is run. As an alternative, disabling User Access Control (UAC) in Vista will also give correct permissions to the user.

- While in progress, Fortis minimizes and the progress bar increments as the documents are packed.



- When Fortis DocPack completes its export, the *Complete* dialog box displays.



12. Access the Fortis DocPack package in the staging directory specified above and, if desired, copy the content of the staging directory to a portable media.

- The file containing the exported index data references the associated output document(s) with a path relative to the data file, so where ever the Fortis DocPack package is copied, the reference to the documents is still accurate.

STAGING DIRECTORY FOR SINGLE DOCUMENT TYPE QUERY

\DOCPACK – contains graphics used on the HTML data page seen during usage of the document package.

\IMAGES – contains

- NOIMAGE.PDF – a placeholder image if no MAG file was available to export.
- *.PDF or *.* – the exported Fortis document in either PDF or original format.
- *.HTM – one for each exported document; it is the window in which the document is displayed.

\DOCPACK.HTA – the data export of the Query Result data with Open links for each record used to open the associated document.

AUTORUN.INF – for use with portable media, to allow Fortis DocPack to automatically run when the media is inserted into a PC.

STAGING DIRECTORY FOR MULTIPLE DOCUMENT TYPE QUERY

\DOCPACK – contains graphics used on the HTML data page seen during usage of the document package.

\IMAGES – contains

- NOIMAGE.PDF – a placeholder image if no MAG file was available to export.
- *.PDF or *.*** – the exported Fortis document in either PDF or original format.
- *.HTM – one for each exported document; it is the window in which the document is displayed.

DOCTYPE_NAME.HTM – one for each Document Type in the multiple Document Type Query; the data export of the Query Result data with Open links for each record used to open the associated document.

DOCPACK.HTA – the starting file that allows access to the multiple HTM data files from a single page.

AUTORUN.INF – for use with portable media, to allow Fortis DocPack to automatically run when the media is inserted into a PC.

USING A DOCUMENT PACKAGE

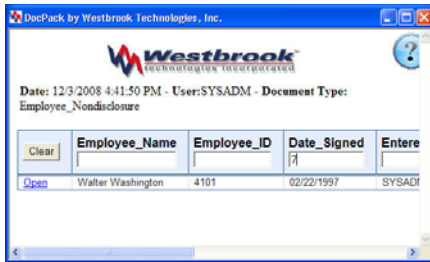
1. In the staging directory, or on the portable media to which the staging contents were copied or moved, double-click *DOCPACK.HTA*.
 - The exported data displays.



	Employee_Name	Employee_ID	Date_Signed	Entere
Open	Wilma Levin	4089	12/12/1995	SYSADI
Open	Walter Washington	4101	02/22/1997	SYSADI
Open	Bria Florent	4052	03/05/1996	SYSADI

2. To filter the documents, enter data into one or more edit boxes below the field names/column headings.

- Note the entered data acts as “contains” criteria.



- Click [Clear] to the left of the column headings to remove the filtering text from the edit boxes.
- Click the Open link to the left of any record to open the associate document.



- If the Fortis DocPack Output is in the PDF format then all documents are viewed in Adobe Reader. Depending on the version of Adobe Reader installed, the Adobe toolbar will vary.
 - Adobe 8.0 or higher is required.
- Click the Adobe Reader button if you need to download the Adobe Reader.



- Click the [Help] button to get help for the current screen.



- Click the [Back] button to close the document and return to the document list.

