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Data Entry Assistant Q&A

Make indexing and updating Fortis or File Magic 5 Series documents easier with Data Entry Assistant! Most likely, customers have information stored in a database that they'd like to import into a Fortis or File Magic database. The thought of retyping all that data is overwhelming! With Data Entry Assistant, indexing or updating documents can be done with a few clicks or keystrokes.

This document provides the most commonly asked questions about Data Entry Assistant and their answers. For additional information, contact your Regional Sales Manager.

Q: What is Data Entry Assistant?

A: Data Entry Assistant is a Fortis and File Magic option that lets customers add or update index data in a Fortis or File Magic database from an ODBC-compliant data source. With Data Entry Assistant, businesses can "reuse" data without manually retyping it.

Q: What are the benefits of Data Entry Assistant?

A: Data Entry Assistant increases the speed and efficiency of indexing documents, reduces data entry errors and eliminates the need to retype data, thus saving businesses time, money and resources.

Q: Who should use Data Entry Assistant?

A: Any business with data stored in an ODBC-compliant data source can take advantage of Data Entry Assistant's time-saving capabilities. Data Entry Assistant is great for businesses performing large volume indexing, back-file conversions and for businesses who frequently update their index data.

Q: How does Data Entry Assistant work in Fortis and File Magic?

A: During indexing of a document, a Fortis or File Magic user enters a key piece of information, such as a shipment tracking number, into an index field or enters data into several index fields. Data Entry Assistant works by matching the data entered into the index field(s) with data from an external source.

When the user starts Data Entry Assistant through a menu command or through shortcut keys, Fortis or File Magic connects to the external data source, searches the a table or view for the value(s) entered, and copies the remaining data for the document to the Fortis or File Magic index fields.

If Data Entry Assistant finds multiple records in the data source that match the value(s) entered, the user can select the correct record from which to copy the data.

Q: What's needed for Data Entry Assistant to work?

A: Businesses need an ODBC-compliant data source that can respond to the ODBC commands issued by Fortis or File Magic, and each workstation with Data Entry Assistant installed must have the proper ODBC drivers needed to communicate with the data source. A Data Source Name (DSN) must also be created to call information from the data source.

Q: What does a DSN do and what does ODBC mean?

A: A DSN uses an ODBC driver to provide connectivity to a database. The DSN contains the information needed, such as database name, database location, and database driver, to connect to a database. Once you create the DSN for a database, you use the DSN to call information from the database. ODBC (Open Database Connectivity) is a standard database access method that makes it possible to access data from an application regardless of the database management system (DBMS)



handling the data. ODBC inserts a middle layer, called a database driver, between an application and the DBMS. The database driver translates queries from the application into commands that the DBMS understands. This translation can only occur if both the application and the DBMS are ODBC compliant.

Q: What should I know when setting up Data Entry Assistant?

A: Index data entered in Fortis or File Magic is used to locate the matching record in the data source. Therefore, the data entered by the user in Fortis or File Magic must match the data in the external source and depending on the database engine, may be case-sensitive. In addition, the index field names in your Fortis or File Magic Document Type must exactly match the field names in your data source. This means that case and character must match.

Q: How does Fortis or File Magic know which data source to connect to?

A: Once a DSN is created for the data source, you specify in the Forthook.ini file the DSN and the table or view Fortis or File Magic should search. The Forthook.ini file is located in the \FortisDT\Sysdata or \FM5DT\Sysdata folder.

Q: Can Data Entry Assistant be used with more than one DSN?

A: You can assign multiple DSNs to a Fortis or File Magic database so that you can use several external data sources for multiple Document Types. However, you can only use one data source per Document Type. To set up Data Entry Assistant for multiple DSNs, you copy the Forthook.ini file to the Related folder for the Fortis or File Magic database that will use multiple DSNs and rename it Database.ini. Then you edit the Database.ini file to specify the DSN to use for each Document Type in the Fortis database. For information on editing the Database.ini file, consult the InfoBase document titled *Setting Up Data Entry Assistant*.