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Update Assistant Q&A

Many organizations have data stored in an application or database that can easily be exported to an ASCII file. With the Update Assistant option, Fortis and File Magic customers can use this ASCII file to reduce time and labor when indexing documents or when they need to update index data that has already been saved. With a few quick steps, customers can update or add index data and/or add and replace pages in their existing documents.

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

Q: What is Update Assistant?

A: Update Assistant is a Fortis and File Magic option that lets you add or update index data and/or add and replace pages in existing documents. Update Assistant uses an ASCII file that contains delimited data along with a predefined Query in Fortis or File Magic to add index data to or update index data for existing documents.

Q: What are the benefits of Update Assistant?

A: Update Assistant is especially beneficial for adding or updating index data for large quantities of documents. Since Update Assistant automatically adds or updates index data, businesses enjoy significant savings in time, money and resources. The Update Assistant option can also be run during off-hours so as not to impede network and database performance.

Q: Who should use Update Assistant?

A: Businesses that can export data to a delimited-ASCII file can make use of Update Assistant. The Update Assistant option is great for using data from applications that are not ODBC compliant.

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

A: Update Assistant uses a delimited-ASCII file and a predefined variable Query in Fortis or File Magic. Update Assistant uses the Query to locate existing documents whose index data will be added or updated. In order to find the documents, at least one index field must be populated. The data in this field must match the first delimited field in the line of the ASCII file. Update Assistant inserts this value in the Query to locate the document. When it finds the document, it copies the remaining data from the ASCII file to the document's index fields. The order in which the data appears in the line is the order in which it is imported into the index fields. Therefore, the number of delimited fields in the ASCII line must match the number of index fields in the Document Type. Update Assistant performs this search and updating for each document. You can also include document paths in the ASCII file so that you can insert and replace pages.

Q: How do I access the Update Assistant option?

A: You access the Update Assistant option through the *Import Data and Documents* dialog box in a Fortis Scan or Edit Station or a File Magic Input & Retrieve Station. Click the Import Data button on the toolbar or from the Input menu, select Import Data and Documents. The Document tab of the *Import Data and Documents* dialog box lets you specify the Query to use, while the Advanced tab is where you specify how your ASCII file is delimited and if you'd like to replace or add pages to the existing documents.



Q: What’s needed for Update Assistant to work?

A: The Update Assistant option needs to be purchased. The buttons and options on the *Import Data and Documents* dialog box will be unavailable when the option is not purchased. To perform the updating and/or adding of index data, you need a properly-delimited ASCII file and a predefined Query in Fortis or File Magic. That’s it!

Q: What should I know when setting up Update Assistant?

A: The index field value Update Assistant uses to search for each document needs to be unique. This ensures that the correct document is found and the correct index data is added or updated. A unique value might be a purchase order number, a patient ID, a claim number or a case number.

For example, a purchase order is most likely identified by a unique combination of letters and numbers, such as PO-1029. The Document Type for purchase orders would include an index field for this value, and the purchase order would already be indexed with this value entered prior to using Update Assistant. The purchase order number would be the first delimited field in the ASCII line, such as “PO-1029”, “Acme Company”, “113.”

If the value is not unique, Update Assistant may find multiple documents. On the *Import Data and Documents* dialog box, you can specify that if multiple documents are found, Update Assistant should update all occurrences or specify that Update Assistant notify you that multiple documents were found.

Q: How should I construct the Query in Fortis or File Magic?

A: The Query in Fortis or File Magic must be a variable Query. The index field the Query should search on is the index field that contains the unique identifier for each document. The Operator (or condition) used in the Query should be set to *Equals To* so that the correct document is located.

Q: How should the ASCII file be set up?

A: A properly delimited-ASCII file is essential to achieving the results you want. Your ASCII file must contain the index data you want to enter into the fields for each existing document. The data must be defined in a line in your file using a field delimiter character - typically a comma (,) - to separate the information for each field. The order in which the data appears in the line is the order in which it is imported into the available fields. The first field is used to find the document and each field thereafter is imported in order. Once the last available field is filled, any remaining data is ignored. Fields in Fortis and File Magic are left blank if no data appears for them on the line. Therefore, the number of delimited fields in the ASCII line must match the number of index fields in the Document Type, even if you want to leave an index field blank in Fortis or File Magic.

You can also use a string delimiter, typically double quotes ("), to separate character strings in your data. Each line of the ASCII file must end with a carriage return/line feed combination. This ensures that each line of your ASCII file corresponds to each existing document.

For example, the ASCII line for updating the index data for a purchase order would appear as follows:

"PO-1029","Acme Company","113"

Update Assistant would run the Query for Purchase Order PO-1029 and update the index fields as follows:

Index Field	Data from ASCII Line
Company	Acme Company
Item Number	113

The lines of your ASCII file can contain the full path and name of the document file used to replace or add pages to your existing documents. The file name must be the last field on the line.