

FortisBlue 6.11 Service Pack 1 Release Notes



What's New

New FortisBlue to DocuWare Migration Utility

The Migration utility has been enhanced to facilitate the creation of DocuWare File Cabinets with better performance and to provide a better experience by giving our partners and administrators more flexibility for how a migrated system is configured in DocuWare.

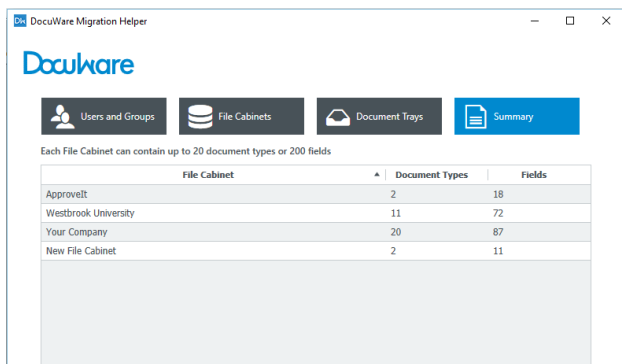
High Performance DocuWare File Cabinets:

The new Migration tools avoid creating DocuWare file cabinets that might result in poor performance.

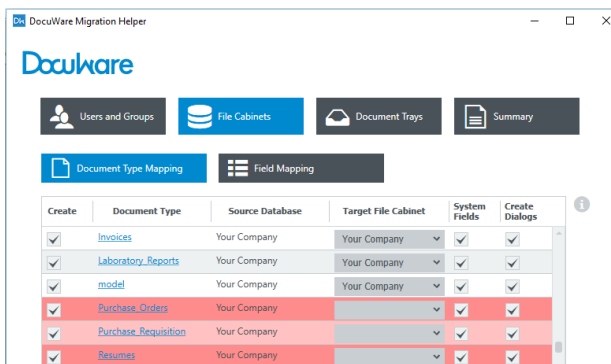
It does so by:

- Limiting the number of fields and eliminating unnecessary duplicate fields
- Letting you choose if dialogs should be created or not for a specific doc type
- Mapping fields that contain the same data together to the same field in DocuWare, improving search.

There are many major changes to the utility supporting the creation of better DocuWare systems, but the first that you will notice is that system set up has been separated from document migration. The first step is to set up DocuWare File Cabinets to accept FortisBlue Documents and index data, and the second step is to Copy your documents and data.



Limits are set to prevent file cabinets from being created that are likely to have performance problems.



Document Types are automatically mapped to a File Cabinet until a limit is met, Document Types that exceed the limit are highlighted.

Step 1: Flexible File Cabinet, Document Type, and Field Mapping

The new File Cabinet Creation part of the Migration Helper is installed and launched on your computer, and is run by a user who is a member of the administrative group in FortisBlue. The utility provides flexibility for the user to make simple choices, like what users and groups to copy to DocuWare and what document trays to create, as well as to make decisions about what File Cabinets, Document Types, and Fields should be created. Each item is mapped from FortisBlue to a corresponding File Cabinet in DocuWare.

Some key features about the mapping process are:

- Limits on total number of Fields and Document Types in a single DocuWare File Cabinet
- Choose which Document Types to create
- Split existing Databases into multiple File Cabinets
- Ability to exclude FortisBlue Fields from being created
- Rename File Cabinets & Fields
- Ability to choose if dialogs are created per document type
- Ability to exclude System-Filled Fields
- Ability to turn on/off version/full text per file cabinet

Create	Document Type	Source Database	Target File Cabinet	System Fields	Create Dialogs
<input checked="" type="checkbox"/>	AP_Purchase_Order	Westbrook University	Westbrook Univer...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	AR_Invoice	Westbrook University	Westbrook Univer...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AR_Purchase_Order	Westbrook University	New File Cabinet	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AR_Sales_Order	Westbrook University	New File Cabinet	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Audit_Log	Westbrook University	Westbrook Univer...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AutoNum_Index	Westbrook University	Westbrook Univer...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Correspondence	Westbrook University	Westbrook Univer...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

File Cabinet creation and Document Type Mapping allow the user to select exactly what will be created in the new DocuWare system.

Create	Type	Fortis Index Field	DocuWare Index Field
<input checked="" type="checkbox"/>	Text	Tracking_Number	Tracking_Number
<input checked="" type="checkbox"/>	Text	Invoice_Number	Invoice_Number
<input checked="" type="checkbox"/>	Text	new_field	new_field
<input checked="" type="checkbox"/>	Text	Carrier	Carrier
<input checked="" type="checkbox"/>	Text	PO_Number	PO_Number
<input checked="" type="checkbox"/>	Date	Document_Date	Document_Date

The user can choose what Fields are to be created and how they will be mapped to the new DocuWare system. Fields can be added and renamed.

Step 2: Migrate Documents

After the DocuWare system has been configured, documents can be migrated. Simply run a query while logged in as a user who is a member of the administrative group in FortisBlue and click Copy to DocuWare. A window will open where you can download the migration file. Opening that file will start the Document Migration Utility. The Copy to DocuWare button is no longer available to users who are not members of the administrative group.

Before the documents are copied, users will have the option to:

- Import only current version or all versions of versioned documents
- Perform full-text server side

These options are intended to help reduce the amount of time it takes for documents to transfer from FortisBlue to DocuWare.

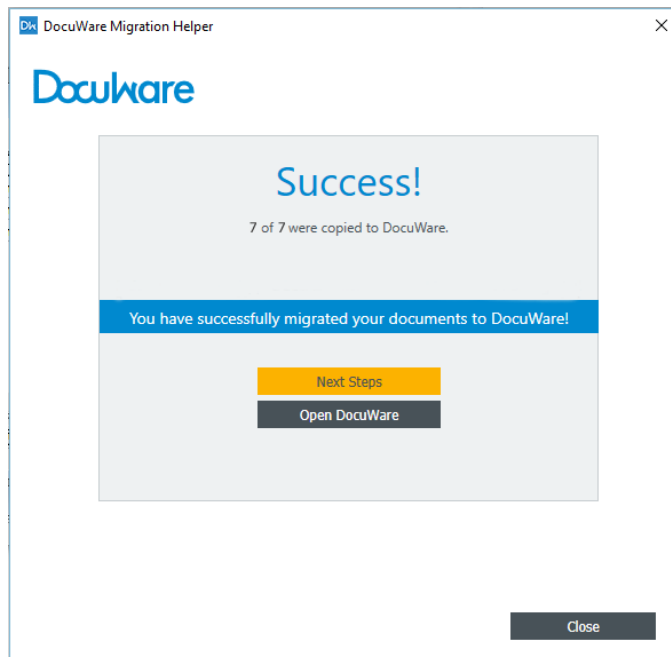
Copy to DocuWare Export to Excel Refresh Open

AP Invoice (50)

	Vendo...	Vendo...	Invoic...	Amou...	Purch...	Check...	Date E...	Date L...	Entere...	Last M...	Name	Page...	Check...
<input type="checkbox"/>	194	Waylo...	08/24/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	294	Lou Cop	08/14/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Maggi...	08/10/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	194	C.M. B...	08/16/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Homer...	08/01/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Lisa Si...	08/07/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	294	Eddie...	08/14/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Maggi...	08/05/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Marge...	08/04/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	194	Waylo...	08/24/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Bart Si...	08/05/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	394	Dr. Nic...	08/28/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Maggi...	08/10/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	94	Homer...	08/01/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	194	C.M. B...	08/16/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	594	Abe Si...	05/10/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	494	Lenny...	03/17/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	194	Waylo...	08/24/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	
<input type="checkbox"/>	294	Chief...	08/14/...				03/03/...	03/03/...	admin-1	admin-1	Emp E...	1	

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Click the Copy to DocuWare button and the Documents and their index data will be copied to the new DocuWare system.



**Support
Contact**

**Monday- Friday
8:30am - 8:00pm
(EST)**

Email:

fortissupport@docuware.com

Support Portal:

<https://www.docuware.com/document-management-training-and-support/support-portal>

Support Forum:

<https://www.docuware.com/forum>