

Visualfiles and Integration

As the recognised best of breed workflow and document assembly supplier across the legal and related markets Visualfiles is called upon to provide a suite of integrations to a variety of 3rd party software.



Principally these include specialist legal accounts software such as Thompson Elite, SOS, Aderant, Axxia and others but also Microsoft Office (particularly Outlook), Document Management, Records Management, Content Management, Customer Relationship Management (CRM), Digital Dictation, E-mail Systems, Telephony Systems, Credit Card Systems, Barcode Systems and many more.

Today the greatest part of Visualfiles' development resource is deployed on developing new and improved integration capability for an ever increasing list of specialist and complementary products.

However to assist our customers with the day to day integration requirements that are routinely encountered, the Visualfiles product contains a number of configurable facilities to enable administrators to provide fast and reliable integration when called upon by business needs.

Most of this integration capacity is provided through the Visual Exchange environment shown as part of the overall integration architecture (right). In many regards the Visual Exchange component acts as an application to application hub allowing the Visualfiles product to act as an application portal consolidating the data required by users into a single interface.

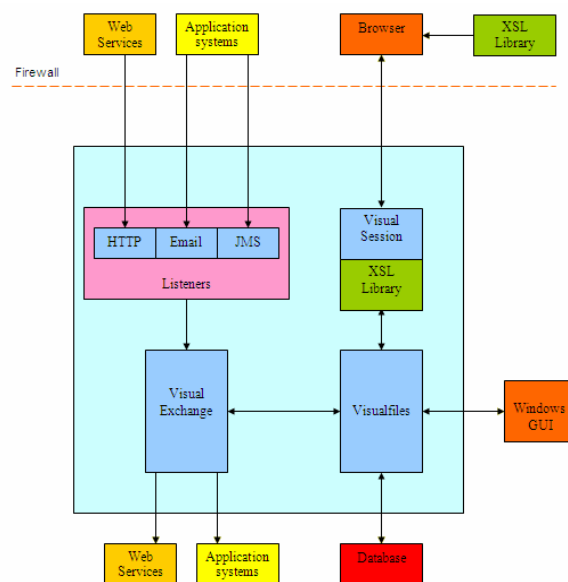


Figure 1: Integration Architecture



Web Services

Web Services represent a growing method of integration between Visualfiles and third party applications. Web services are very flexible and provide the developer with a comprehensive means of exchanging information using HTTP and XML standards.

Visualfiles supports web services through the *&Request* command available in the standard Visualfiles scripting language. This provides a modern and reliable integration mechanism to a wide range of potential applications.

In Visualfiles terms, the *&Request* command may be used to call a web service. The command takes the contents of an XML file, sends this information to the specified URL and receives the response. This functionality is achieved by packaging the XML document as a SOAP message and invoking the specified SOAP action. The format of the XML that is sent and received and the SOAP actions supported will be dependent on the web services being used and will be documented by the service provider.

The *&Request* command can be used in conjunction with database fields, including temporary fields within the normal scripting process.

Embedded Web Pages and URL's

Many clients will frequently refer to web pages to retrieve or share information and Visualfiles allows simple direct access to this type of facility triggered through scripts or buttons. Additionally many 3rd party products have browser interfaces that may be utilised for integration as these web pages may be opened in a new browser window or embedded within Visualfiles screens.

Within the standard scripting language, the *&Open* command may be used to open a document or file held on the file system but external to Visualfiles. Additionally this command may open a web page, for example, when linking to the SearchFlow website (property information searches in the UK).

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This method supports GUI level integration with the leading legal accounts software vendors Thompson Elite and Aderant (shown below) where the web view components of these products are embedded in Visualfiles and parameters are automatically passed to determine the specific view the user is shown with each new enquiry.

Of course highly developed back-end processes ensure that file opening, time recording, billing etc are fully integrated between Visualfiles and these two applications.

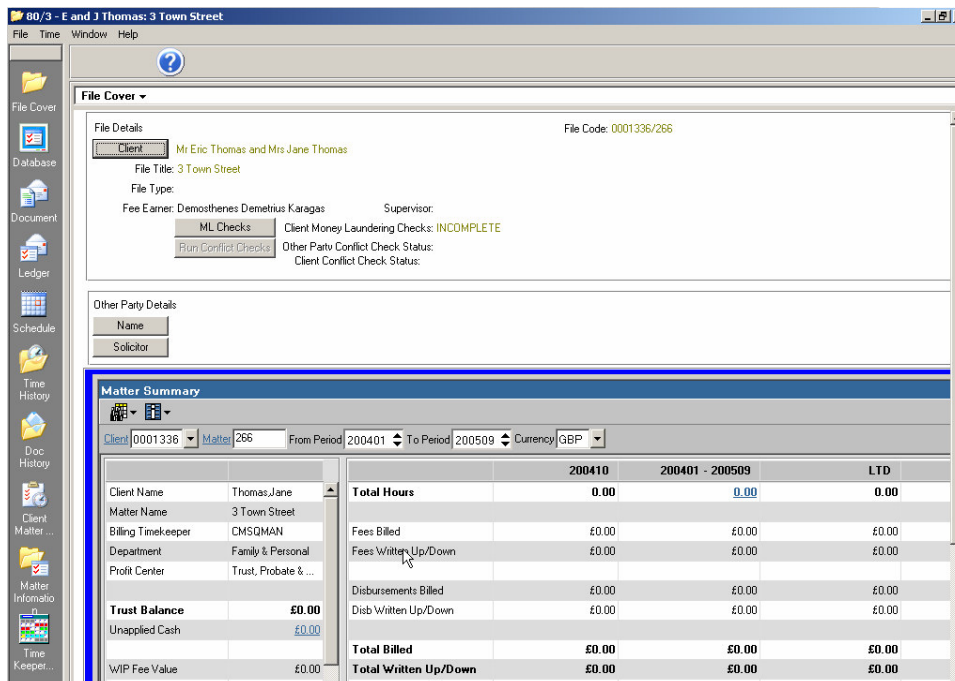


Figure 2: Visualfiles / Aderant Integration using embedded web views

Overall, there are numerous ways to integrate Visualfiles with other applications – the basic list below includes;

- Java Messaging
- Web Services
- XML transfer
- SOAP
- COM Object

File transfer between applications is also supported using the following formats;

- Comma delimited
- Pipe separated
- Excel
- Access
- ODBC
- Java
- XML

Other methods available depend entirely on the technical skills available to the client. If they have some form of programming resource then there are more integration possibilities.

For example, simple VB programs may be written that talk to almost any third party piece of software. You can then call those VB programs from scripts within Visualfiles. This can then be combined with the Visualfiles API to allow 3rd party applications to then control Visualfiles.

Basic integration with most applications is possible as long as there is the technical ability to understand the problem and figure a way to the solution given the tools we provide.

In many instances the technical competency of Visualfiles administrators among our user base results in integrations written within the toolset provided without Visualfiles assistance.

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