

Fortis Enterprise Document Management



Why Document Management

Many organizations face the challenge of managing and accessing business information from disparate sources. For example, an organization might maintain some documents within traditional paper filing systems while other content is electronically stored but not easily accessible. Oftentimes, employees engage in manual, time-consuming searches to locate and retrieve vital documents to complete a business transaction or make a business decision.

Fortis provides tremendous efficiency gains by allowing organizations to capture, store and retrieve paper-based and electronic documents into one system. With **Fortis**, information is readily accessible and centrally located. This means employees no longer spend time routing documents from desk to desk or trying to locate a misplaced file. **Fortis** provides instant access to information and promotes an efficient use of resources.

Fortis & Fortis SE

The **Fortis** product line contains two offerings: **Fortis** and **Fortis SE**. The following provides an overview of each. For complete descriptions, visit www.westbrooktech.com.

Fortis

Fortis is our feature-rich client/server product suite that is ideal for the office, department, organization or enterprise, operating over a LAN, WAN, an intranet, the Internet or an extranet. A multi-user system, there is no limit imposed on the number of concurrent users as **Fortis** can scale enterprise wide. For database engine options, **Fortis** can work with Microsoft SQL Server and Oracle.

Fortis provides many features, including Microsoft Office integration and web-based document access via **Fortis Web**. A full suite of options is available to suit your business processing needs and enhance the **Fortis** document management solution.

Fortis SE

Fortis SE operates as a multi-user system for up to 20 concurrent users. **Fortis SE** uses Microsoft SQL Server 2005 Express as its database back end.

Fortis SE is also available with **Fortis Web** so that users can access documents via a browser interface. As with **Fortis**, additional options are available to suit your business processing needs and enhance the **Fortis SE** solution.



// We needed a solution that was easy to use, that could **integrate** with the Microsoft suite, that allowed us to **customize** how our metadata was stored **and have flexibility**. **Fortis was the answer.** //

T. Perrin, Insurance



Features and Functions of Fortis

Fortis is key to optimizing business processes, improving information retrieval and expediting the delivery of information.

Capturing Content

Fortis uses a database to organize documents that are brought in, or captured, to the document management system. Paper documents are often scanned, while electronic files are often imported directly into the system. **Fortis** makes it easy to capture documents and data into the system. With the ability to scan, fax or import documents as well as import documents and data into the system, organizations can be sure all critical information is securely stored and properly managed. **Fortis** users can capture a wide range of electronic content, including Word or Excel documents, HTML, black and white images, color images, and more.

With built-in Microsoft Office integration, users can also automatically capture Word, Excel, Outlook and PowerPoint files from within the Office application directly to **Fortis**, thus automating the capture of data and eliminating the need to switch between applications.

Fortis also provides several capture features to improve document quality, aid in data capture, and improve efficiency: **Optical Character Recognition (OCR)**, **Bar Code Recognition (BCR)** and **Image Enhance**.



Fortis Office seamlessly integrates **Fortis** with Microsoft Office. With **Fortis Office**, you can simply click the **Send To Fortis** toolbar button within Word, Excel, Outlook or PowerPoint and capture the file directly to a **Fortis** database or to an In Basket. As there's no need to switch between applications, capture efficiency is greatly increased.



// We can now **share information easily** and securely from across the globe as if we all worked in the same office. Our accounting departments **from New Jersey to Sweden** have **saved hundreds of hours** in time and can perform document-related tasks **in seconds.**

Atlantic Container Line, Transportation //

Indexing and Storing

Content that is captured to **Fortis** is identified with associated index data so that it can be easily stored, retrieved and managed. The indexing process is essential to how users search for and retrieve information.

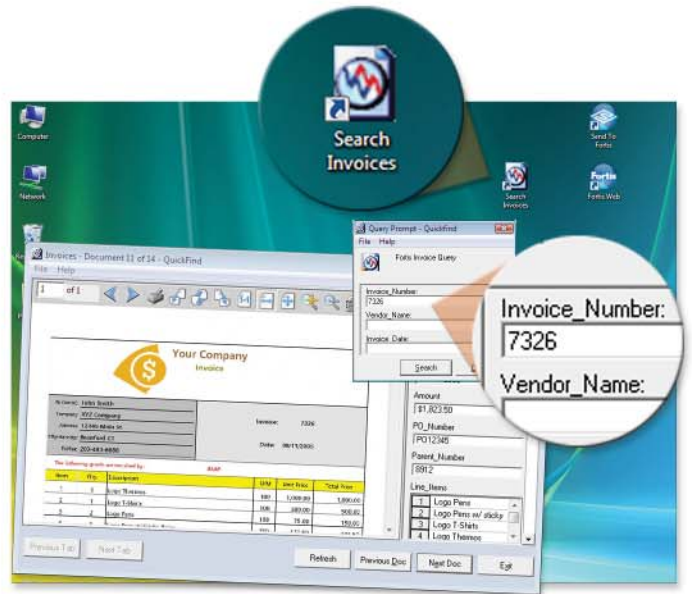
The database allows documents to be indexed, or described with keywords, for faster searching and retrieval.

The descriptive information about documents is entered into fields defined by an administrator. **Fortis** provides numerous methods for indexing documents. Users can index documents manually or automatically, and documents can be indexed in batches to speed up the indexing process. Using templates and processing scripts can further increase the indexing process speed.

Retrieving

Targeted searching is the most efficient way to gather information. **Fortis** lets users define and perform queries to retrieve documents by searching the index data, by searching the text contents (with Full Text Search) of documents, by searching the text content of annotations or by performing a combined search.

Advanced search lets users quickly search different types of documents at once and easily narrow the search results. Users can also retrieve related documents from the document viewing window. With **Fortis QuickFind**, users can search for documents right from their desktops. With a multitude of search options, users can be sure to quickly find the documents they need to complete a task.



*Find business critical information in seconds from your desktop. Targeted searching lets you efficiently find the information you need. Using **Fortis QuickFind**, query a **Fortis** database right from your desktop. Click the desktop icon, type in the key information you are looking for and within seconds, the documents display for you to review.*



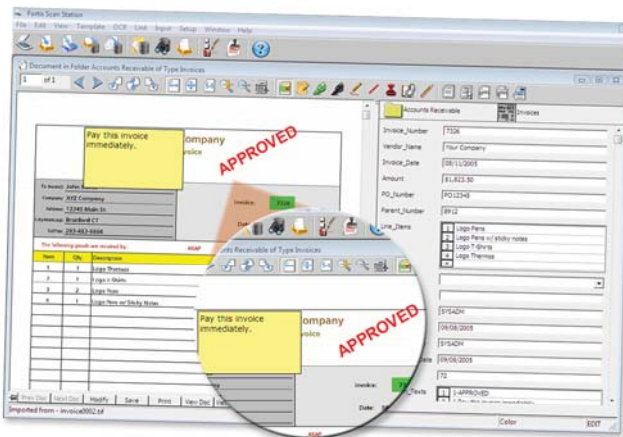
Viewing and Editing

The **Fortis Document Viewer** provides complete functionality for accessing and viewing all types of documents. With an intuitive interface, users can easily view, annotate, edit and index documents. And more than one person can access and view the same documents at the same time.

Depending on the page type, users can cut, copy, paste, delete, or enhance pages within a document. Users can also insert, replace, burst or reorder pages, remove blank pages, and rotate an entire document.

Easily modify documents with the Launch feature

With this feature, you launch an application, such as Microsoft Word or Excel, to edit the document and save your changes. Your changes are then automatically saved to Fortis. There's no need to re-import the file.



Fortis' versioning feature protects a document from simultaneous revisions. With versioning, users can maintain multiple versions of a document. Modifications to a document are controlled by **check out** and **check in** procedures.

The Document Viewer also lets users add a variety of annotations to documents. Users can attach notes, freehand drawings, lines, and stamps to a page, and highlight or redact sections of pages. Users can also include OLE objects from other applications as annotations. Security features for annotations include an Always Visible attribute, so a user cannot hide an annotation, and a Protected attribute, so that only the author of the annotation or the administrator can modify or delete it.

Collaborate with a wide variety of annotation tools

Add notes, stamps, or highlight a specific area of your document so that others know what's been done with the document or the next steps needed in the process.



// **Fortis** has also helped with our **Sarbanes-Oxley compliance** requirements...our entire archival process has been **made simpler**.

State Bank of Long Island, Finance //



Sharing and Collaborating

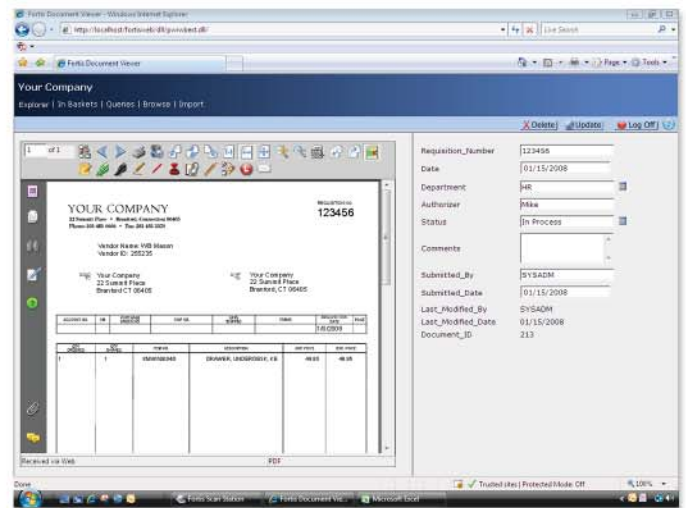
Information in **Fortis** can be easily shared with colleagues, partners and customers on a LAN, WAN or across the Internet with **Fortis Web**.

Documents can be shared with others by printing, faxing, sending via e-mail, sharing on a network and embedding them as OLE objects. Users can also export documents in a variety of formats, including PDFs and TIFFs, and can export index data along with the document.

Fortis Inflo is a workflow solution that can route, manage and collaborate information within a business process. An organization can diagram the business processes so that users can digitally work together on projects. Automatically move documents, change index data, send e-mail notifications and perform other processes.

Integrate line-of-business (LOB) applications, such as accounts payable/receivable, customer relationship management (CRM) and case management systems, with **Fortis** using the seamless image integration capabilities of **Fortis EnableIt** without requiring custom or costly integration work. Users can instantly retrieve Fortis documents while working in their business critical applications. EnableIt also provides the ability to pass data from the core business application to **Fortis** and vice versa, scan and index documents into **Fortis**, import documents, update data and many other integration techniques.

EnableIt can be used to unify disparate desktop applications into a cohesive system, automate redundant tasks, increase workflow efficiency, decrease data integrity errors and allow data to be re-purposed.



Securely share information down the hall or around the world
Today's business climate calls for instant access to key information at anytime from anywhere. **Fortis Web** lets you view and edit documents securely from an Internet browser.



“ We've had such success with Fortis that we will be **expanding its use** with **PowerWeb** so patients can view documents as well.

The Hospice of Palm Beach County, Healthcare ”



“ It’s difficult to measure the magnitude of the loss from the hurricanes, if we hadn’t had our documents stored electronically in Fortis. **All important documents** and files from every city office **are safe** and business can proceed as usual for us. ”

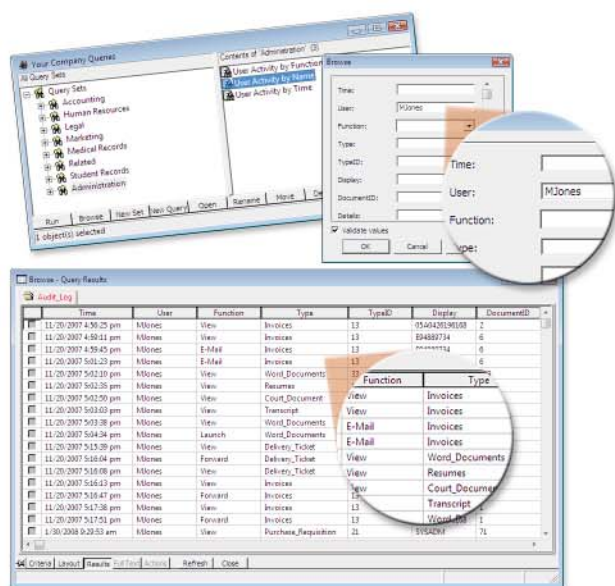
Pensacola City Clerk, Government



Securing Content

The **Fortis** system’s security capabilities provide a powerful yet flexible blend of user access management and control for any **Fortis** installation. This security is provided by assigning **Fortis** users a password and database access and by varying their functional and feature access permissions. With multiple levels of permissions, you can be assured your documents are protected from unauthorized access and alteration.

Audit Trail enables administrators to set up an audit log so that **Fortis** tracks a variety of user activities performed on documents, such as indexing, modifying, deleting, viewing, faxing, forwarding, emailing and printing.



Track activities with Audit Trail

With Audit Trail, you can track when a user indexes a new document to a database, modifies a document’s index data, deletes a document from a database, views a document, prints a document and many other related activities.



Benefits of Fortis Enterprise Document Management

Westbrook Technologies, a leader in document management software, provides solutions to businesses of all sizes that need to maintain their competitive edge. Our **Fortis** solution assists thousands of users throughout the world capture, index, store and retrieve their critical information from anywhere - instantly and securely.

Increase productivity and optimize work efforts

With immediate and reliable access to content, users can efficiently retrieve the information they need to complete their business tasks. Making productive use of information enhances performance and empowers users to identify and pursue other business opportunities or beneficial activities.

Enable timely and informed decision making

As content is centrally located, users can be assured that they have all the necessary information to make a decision. A single access point ensures critical information can be produced on demand. All the facts, figures and supporting data are readily available.

Promote quick and accurate service to customers or partners

With targeted searches, users can instantly access documents to provide technical support, answer inquiries, resolve a

complaint, check the status of an order, claim, or information request – activities that improve service levels and garner customer loyalty.

Reduce operating and administrative costs

Printers, copies, microfilm, storage space, retrieval efforts, shipping charges, maintenance costs, etc. These are expenses that can greatly impact an organization's profit, not to mention the costs associated with misplaced or incorrectly filed documents. **Fortis** allows organizations to reduce the expenses associated with paper-based processes and realize savings in other areas.

Accelerate project completion and shorten business process cycles

With manual processes, reviewing, routing and processing documents can take days, weeks and sometimes even months. **Fortis** improves business processes to enable the timely completion of business tasks.

Westbrook Fortis – A Complete Document Management Solution

Store documents safely and securely

Integrates with **Microsoft Office** and advanced capture solutions

Fortis FormIt

Creates, processes documents from Web-based forms

Fortis Virtual Scanner

Brings scanning functionality to any workstation without hardware

PlanetPress

Design and create variable forms with data from LOB applications



Fortis Email Management

Archive and index messages and attachments

Fortis Imagent

Link documents in Fortis with line-of-business applications

Fortis Inflo

Automates workflow within a business process

Fortis Approvel

Automate authorization processes with Web-based workflow



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