



Fortis for Legal Services

The case for document management in law offices

Legal practices have an abundance of paper and electronic documents from client files, records and correspondence to contracts, leases, wills and trusts, just to name a few. The value that a legal counsel brings to his clients is heavily dependent on how he manages all these paper and electronic documents.

The explosion of paper and electronic records has created an administrative cost and time burden on law offices. Approximately 75 percent of small and medium sized legal practices still retain all paper records. There is a major opportunity to improve the business performance of these organizations, and therefore client services, through the implementation of a document management solution.

In general, legal practices need to devote more and more administrative effort to searching, retrieving, and updating client files and records. They're also spending significant time and money on copying and transmitting legal documents for review. There are frequently times pressures limiting the extent to which legal staff can search and examine potential documentation, information and evidence in preparing legal briefs.

Westbrook **Fortis** is a document management software tool that captures, indexes, stores and retrieves paper and electronic documents. Once in **Fortis**, these documents are full-text searchable and secure. Legal firms which have put **Fortis** document management to work have realized significant productivity benefits including the amount of time needed to search through client files and discovery documents. They have also dramatically reduced storage, administrative and transmittal costs, all of which allow firms to refocus resources on revenue-producing activities.

As an added benefit, legal firms with **Fortis** have a strong disaster recovery plan in place where they can recover complete client records in minutes from backup electronic media. And because **Fortis** integrates with MS office, it is easy for lawyers and administrative staff to use. The typical payback on **Fortis** software is about six months to one year since it is easy to adopt and integrate into normal legal practices.



Fusco, Brandenstein & Rada PC – This firm, specializing in litigation and class action suits, has gone to a paperless case file to gain competitive advantage and save administrative labor. Administrative efficiency has risen 62% with a competitive advantage gained from portable, searchable case files.

Rothstein, Rosenfeldt & Adler – This small law firm has moved to an entirely paperless office with **Fortis**. The consequences have been major savings in file and archive costs as well as improved case handling through immediate availability of all case documents and powerful search of correspondence and materials.

Contracts

Corporate legal departments employ **Fortis** to archive contracts, conduct discovery to establish corporate liability, and achieve time and cost savings with client review and transmittal.

Matter Management

Fortis, which features Bates numbering, version control, flexible indexing, foldering, and full text search is a repository which offers competitive advantage in secure filing of legal matters, rapid research and retrieval, and archiving.

Client Records

Fortis provides a secure repository for capturing, archiving and retrieving records. Historical and current records are moved into an electronic archive, providing secure records, searchability, and digital backup.

Compliance

The **Fortis** repository can place documents into an unchangeable format and secure repository to monitor, access, modify and dispose of documents.

Administrative Systems

Fortis automates capturing invoices, shipping receipts, and other business documents and linking them to finance systems. Accounts payable and receivables both have very strong returns on investment.

Real Estate Transactions

Fortis provides a comprehensive approach to handling the document sources and types for real estate transactions, as well as to expedite document processing workflow, review, and transmittal of document packages.

Disaster Recovery

Fortis provides complete offline mirroring of document repositories which allows quick disaster recovery.

Fortis for Legal Services

Fortis provides one document management backbone that integrates with your administrative and business systems.

Legal Applications

Fortis is in use successfully in virtually every function and department of law firms and corporate law departments. Typical examples include:

- Contracts
- Client review and communication
- Filing, retrieval and disaster recovery
- Litigation matter management
- Corporate risk and discovery
- Courtroom portable files
- Case Research
- Transmittal

Scalable Solutions

Fortis is used by a wide range of legal practices. Representative users include:

- Fusco, Brandenstein & Rada PC, NY
- Rothstein, Rosenfeldt & Adler, FL
- Samuel Silver Esq, NJ

Integrated Document Management

Fortis provides a full range of document management capabilities including:

- Image Capture and OCR
- Versioning and archiving
- Records management and retention
- Security and management
- Viewing and annotation
- Disaster recovery

