

Fortis™

Document Management Software



Speed	Find what you need fast
Power	Break through organizational barriers
Control	Work from wherever you want, whenever you want

Why Document Management Is Important

Nearly every organization in every industry faces the challenge of managing and accessing business information from disparate sources. A company, for example, might maintain some documents in traditional paper filing systems, while other content is stored electronically, but is not easy to access. Often employees conduct manual, time-consuming searches to locate and retrieve important information to complete a transaction or make a business decision.

Westbrook's **Fortis** document management software helps organizations gain enormous efficiencies by allowing users to capture, index and store paper and electronic documents and images into one centrally located system. You can then easily retrieve documents, edit, annotate and distribute them as necessary. This means no more time-consuming searches through filing cabinets or trying to find a misplaced folder, and no longer spending time routing documents from desk to desk or department to department. Add optional workflow functionality to automate processes with electronic routing and notifications.

By deploying **Fortis** document management software, you have instant access to information, maximized use of all resources, and a return on your investment measured in months, not years.

Fortis and Fortis SE

Fortis Document Management Software is available in two versions:

Fortis is the enterprise-scalable version with no limit on concurrent users. It is based on the enterprise version of Microsoft SQL Server 2008 and includes **Fortis Web**, which allows viewing and editing Fortis documents over the Web. Fortis operates over a LAN, WAN, intranet, the Internet, or an extranet. It works with Microsoft SQL Server and Oracle.

Fortis SE serves up to 20 concurrent users and is sold in 3, 5, 10, 15 and 20 seat configurations. It is based on Microsoft SQL Server 2008 Express. **Fortis Web** is available as an option so that users can access documents via a browser interface.

Fortis and **Fortis SE** have optional modules to support complex workflow – **Fortis Webflow**, and to exchange data and documents with line-of-business software – **Fortis Imagent** and **Fortis EnableIt**.

Fortis Web Services provide a development platform that enables Westbrook to create new options that more easily integrate **Fortis** with other application suites and take advantage of Services Oriented Architecture (SOA) methodologies.

Fortis also easily integrates with copiers, printers, scanners and MFP technologies. It offers connectors that integrate with front-end capture solutions including eCopy, Kofax, AnyDoc, Paratec and Plustek, as well as document creation software such as PlanetPress and MS Office.

How Fortis Works for You

Fortis optimizes business processes – from speeding capture and retrieval of information to its delivery. Employees reach their peak productivity – all the time. Here's how:

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. With the ability to scan, fax or import documents into the system, **Fortis** makes it easy for organizations to securely store and properly manage all critical information. **Fortis** users can capture a wide range of electronic content, including MS Word or Excel documents, HTML, black and white or color images, to name a few.

With built-in Microsoft Office integration, you can also automatically capture Word, Excel, Outlook and PowerPoint files from within the MS Office application directly to **Fortis**, automating data capture 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.



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With **Fortis**, excelleRx captures data more consistently. When it was entered manually, information was typically incomplete. Now that the process is electronic, all the fields – name, date of birth, SS number, doctor's name, fax, hospice name – are available so we can search for documents by any criteria we choose.

excelleRx
Healthcare

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*Fortis integrates seamlessly with Microsoft Office. 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.*

Indexing and Storing

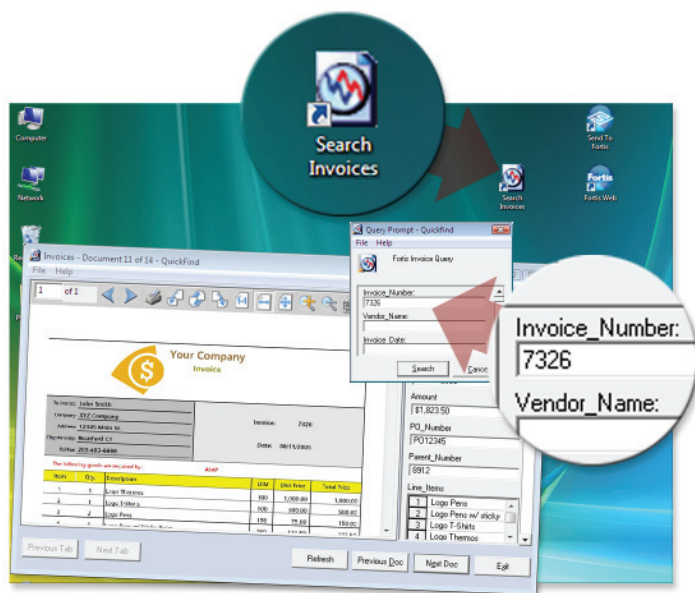
Fortis users can identify content captured into Fortis with associated index data so you can easily store, retrieve and manage it. Simply index, or describe, documents in the database with keywords to search and retrieve them quickly.

An administrator defines the fields for entering descriptive information about documents. **Fortis** provides a number of ways to index documents – manually or automatically; also in batches to speed up the process. Using templates and processing scripts increases the speed of indexing even more.

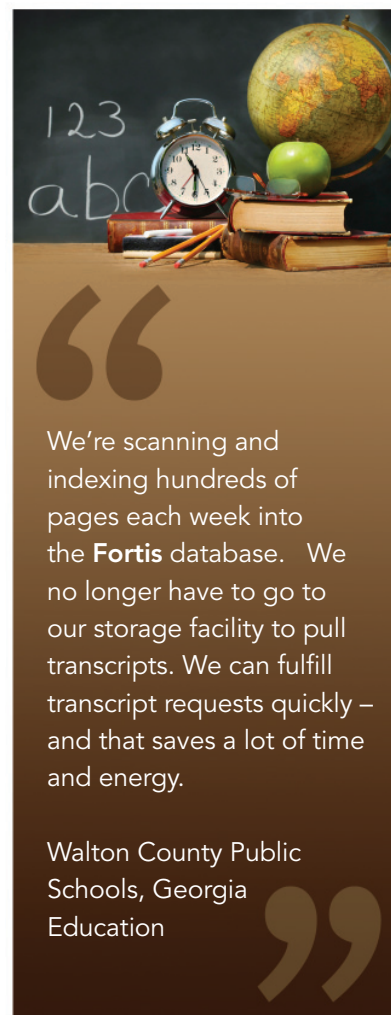
Retrieving

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, the text contents of documents (with Full Text Search), the text content of annotations, or by performing a combination search.

Advanced search lets you quickly look for different types of documents all at once and easily narrow the search results. You can also retrieve related documents from the document viewing window. With **Fortis QuickFind**, you can search for documents right from your desktop. With so many search options, you can be sure to quickly find what you need to complete most tasks.



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, you 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, you 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.

The **Fortis versioning** feature protects a document from simultaneous revisions, and you can maintain multiple versions of a document. **Check out** and **check in** procedures control document modifications to a document.

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

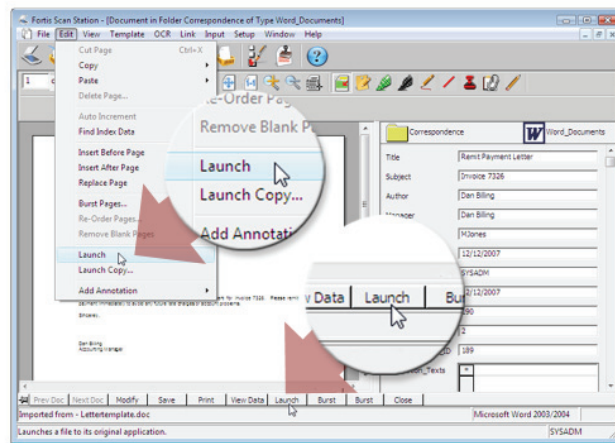


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The big plus is everyone can go to one place and look at the same information from any location. **Fortis** is integrated with LaForce's bid management application and by hitting a hot key, users can access all the paperwork associated with a particular job.

LaForce, Inc.
Manufacturing

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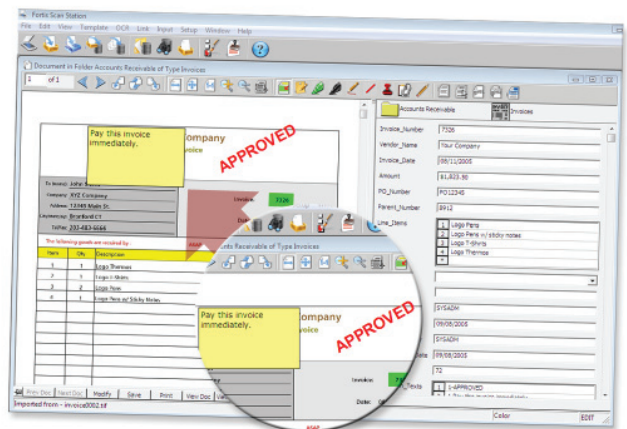


Easily modify documents with the Launch feature

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.

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.



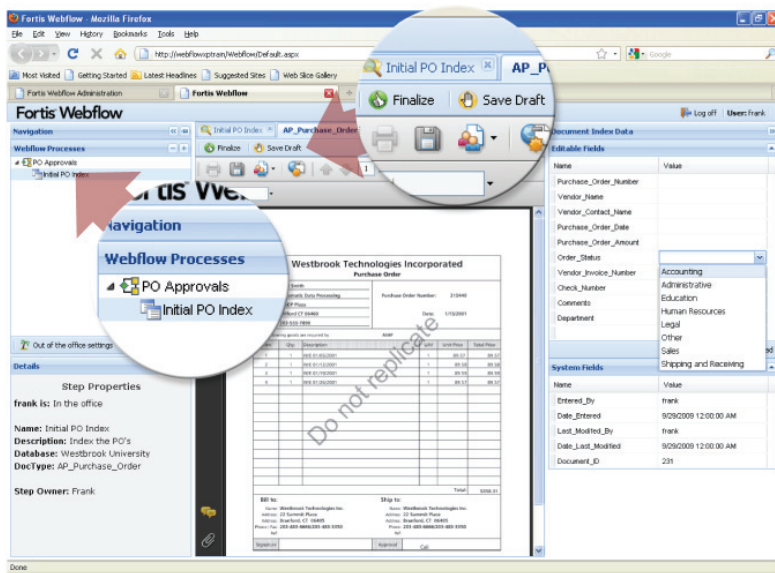
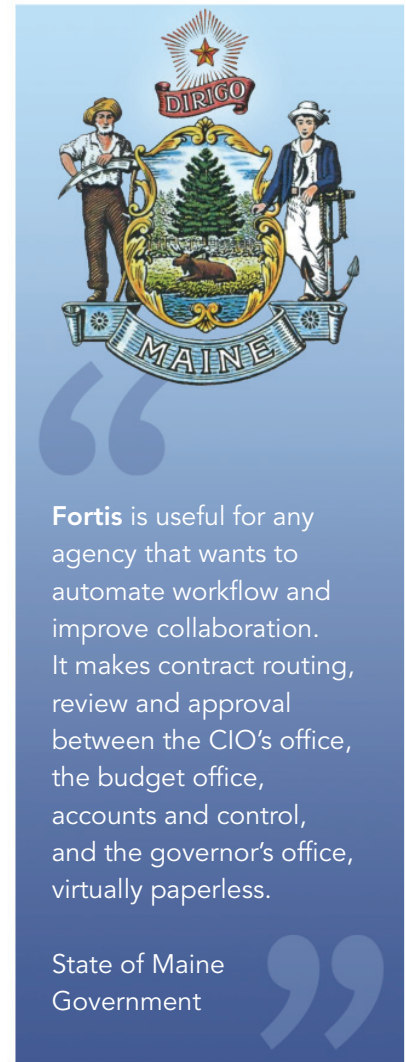
Sharing and Collaborating

You can easily share information in **Fortis** with colleagues, partners and customers on a LAN, WAN or across the Internet with **Fortis Web**. Other ways to share documents is to print, fax or send them via email, sharing on a network and embedding them as OLE objects. You can also export documents, along with their index data, in a variety of formats including PDFs and TIFFs. **Fortis Portal** provides view-only access for geographically distributed environments, mobile access, and customer-facing organizations, such as state and local government agencies and utility companies, that need to provide secure, public access to documents.

Fortis Webflow is a workflow option that speeds business processes by eliminating bottlenecks. With built-in notifications and electronic routing, workflow participants see the steps they are responsible for completing for such activities as insurance claim resolution, purchase order approvals, time off requests, performance reviews, expense reports and engineering change orders, to name a few. This automated collaboration on document processing dramatically reduces operating costs by eliminating faxing or mailing paper copies, automating escalation and out-of-office delegation, and shortening cycle times.

By using **Fortis ImageIt** to seamlessly integrate with line-of-business (LOB) applications, such as accounts payable/receivable, customer relationship management (CRM) and case management systems, you can instantly retrieve **Fortis** documents without leaving that application. You can also send index data back to **Fortis** from the primary business application to eliminate duplicate data entry.

Fortis EnableIt takes you one step further. You can pass data from core business applications to and from **Fortis** and other software applications. You can scan, index and import documents; update index data from within a core business applications; and facilitate many other integration activities.

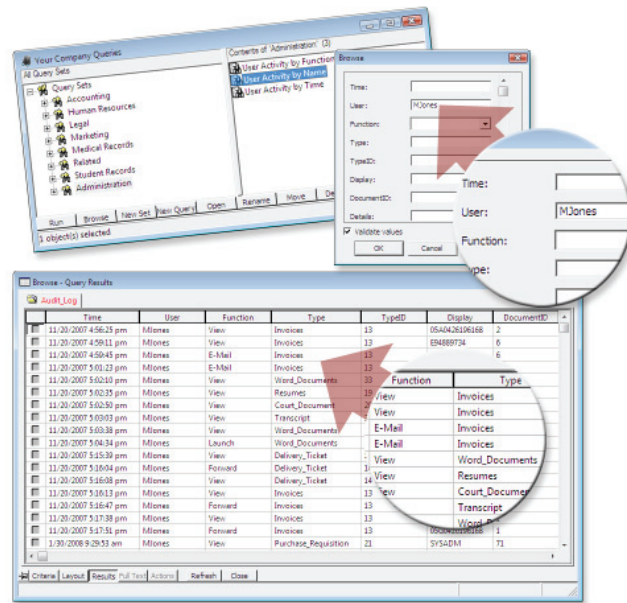
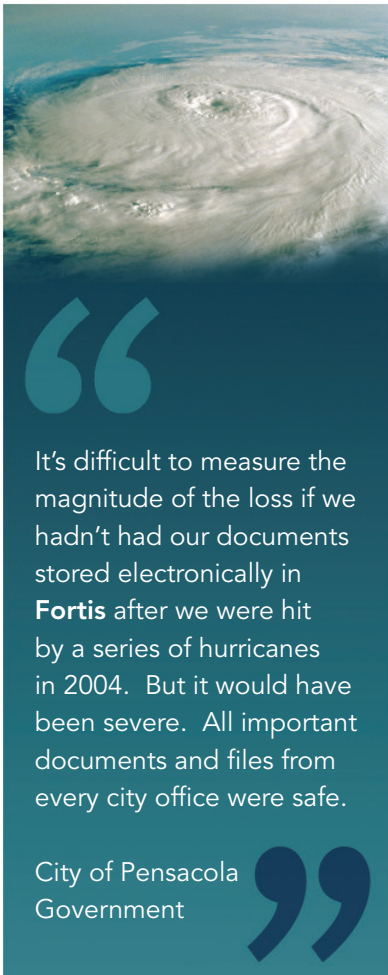


*Accelerate and ensure completion of critical tasks with **Fortis Webflow**, which enables a user to easily create a step-by-step workflow with a user-friendly view of documents that require action.*

Securing Content

Fortis provides powerful yet flexible security. **Fortis** administrators assign a password to **Fortis** users and database access, varying functional and feature access permission. With multiple levels of permission, you can be assured that your documents are protected from unauthorized access and alteration.

Fortis Audit Trail lets administrators 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.

About Westbrook Technologies and Fortis Document Management Software

Westbrook Technologies, founded in 1991, develops enterprise document management software for organizations of all sizes, across every vertical market. Its **Fortis** product line captures, indexes and stores paper and electronic documents and images into one centrally located system.

Fortis users can easily retrieve documents, edit, annotate and distribute them. Organizations get fully searchable documents and images, automated workflow and effortless integration with other business applications. This means no more time-consuming searches through filing cabinets or looking for misplaced folders, and easily routing documents from desk to desk or department to department. With **Fortis**, you have instant access to information and an efficient use of resources. **Fortis** also easily integrates with copiers, printers, scanners and MFP technologies.

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 Webflow

Web-based workflow with user-defined, scheduled rules

Fortis EnableIt

Bi-directional data exchange between **Fortis** and line-of-business applications

Fortis ImageIt

Link documents in **Fortis** with line-of-business applications



Westbrook Technologies, Inc.
22 Summit Place, Branford, CT 06405 U.S.A.
Tel: +1 203 483 6666 · Fax: +1 203 483 3350

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