

JULY 2011

Westbrook Technologies FortisBlue 1.4



Features and Benefits

- Browser-based content management for anytime, anywhere access to documents
- Approval workflow and electronic forms modules included
- Enforce retention policies with automated document archiving/deletion
- Check-in/check-out feature locks document for editing
- Document versioning feature tracks changes and who made them
- Scan to a network folder monitored by FortisBlue or use software connectors for popular MFPs and scanners

Selling Propositions

FortisBlue offers users a host of benefits, chief among them being...

- **Cost effective:** FortisBlue streamlines content management and workflow processes within an organization, which helps to make knowledge workers more productive. Thanks to such efficiencies, the company estimates ROI within 12 months of deployment.
- **Complete control:** Gives complete life cycle management for paper and electronic documents from capture, indexing and archiving, to retrieval and automated purging.
- **Advanced features included:** FortisBlue includes advanced content management features—such as workflow, electronic business forms, check-in/check-out control and versioning, and OCR and barcode recognition modules—that many other platforms charge extra for.
- **Browser-based access:** Since the solution is deployed on a Web server at the customer location, organizations get the anytime, anywhere access benefits of a Web-based solution with the control and peace-of-mind of an on-premise solution.

This Solutions Brief has been reproduced with the written permission of Buyers Laboratory Inc. Any duplication without the written permission of BLI is unlawful and violators will be prosecuted. ©2011 Buyers Laboratory Inc. To purchase reprints, contact BLI at (201) 488-0404 (x17) or at info@buyerslab.com.

Business Challenge

Organizations of all sizes generate paper and electronic documents in vast quantities. Their challenge is to find a particular document or piece of information precisely when needed—to respond to a customer inquiry, to kick off a business process, for collaboration, an audit, compliance, or even for discovery in a lawsuit. FortisBlue content management software captures, indexes, and stores documents, data and images in one centrally located system. Authorized individuals can then easily retrieve, edit, annotate and distribute any or all information as needed. With FortisBlue being accessible from an Internet browser, users can work from anywhere, anytime. They have fully searchable documents and images, automated workflow and easy integration with other line-of-business applications.

Target Market

FortisBlue supports up to 25 concurrent users. It is ideal for small to mid-size organizations (or departments within larger enterprises) that need an intuitive, affordable content management system. FortisBlue is also useful in most vertical markets such as local government and education, as well as within accounting and HR departments in general businesses where there is an influx of forms and other paperwork.

Features

FortisBlue, from Westbrook Technologies, Inc., is a content management platform that helps organizations capture, index, and store documents in one centrally located system. Deployed on a Web server, FortisBlue allows users to work with the system from any Web browser, enabling anytime/anywhere access that is ideal for organizations with a mix of on-site,

Continued on page 2

remote and mobile employees. Repositories can incorporate scans, faxes, and imported electronic documents into the system. FortisBlue includes OCR (optical character recognition), BCR, (bar code recognition) and Image Enhance to increase capture efficiency and accuracy.

Other advanced features included in FortisBlue are flexible electronic forms, workflow for automating approval processes, and bulk document uploads and indexing. Users integrate an e-form into a FortisBlue workflow, such as for time-off approvals. Then the completed form is archived into FortisBlue automatically. Form data can also be shared with other business applications.

Administrators define and set up the index fields, which users will populate appropriately for quick storage, and later, retrieval, of documents. There are a number of ways to index documents, depending on an organization's or department's needs, including batch processing, template, and processing scripts. Searching for stored documents is efficient through targeted searching. FortisBlue lets users define and perform queries to retrieve documents by searching the index data or via a Full Text search.

FortisBlue enables users to view and edit stored documents. Depending on the document, a user can edit, cut, copy, paste, or delete a page or text within the document. Users can also insert, replace, or reorder pages, remove blank pages, and rotate entire documents. There are many annotation options as well: Users can attach notes and freehand drawings, and highlight and redact sections of a page.

Security features are customizable by the administrator and include passwords and multiple levels of permissions. The Audit Log lets administrators set up a log that follows all activities performed on a document, including viewing, forwarding, e-mailing, and printing. In addition to automatically routing, tracking and managing processes, the built-in workflow module allows users to enforce retention schedules by automating document deletion. With permission, administrators can design a workflow where the security policy changes at certain points in the process, making it easier to manage security on the document. These features support records management and compliance initiatives that affect all organizations.

In addition to the built-in workflow, features new to the latest version of FortisBlue include automatic document versioning, which tracks changes to a document (and who made them) and makes available any previous version of a document to an authorized user. The product's check-in/check-out collaboration abilities gives user exclusive rights to edit a document until they check it back in, and shows other users who has the document locked for editing. FortisBlue also now allows users to bulk-index groups of similar documents, providing a one-step process for indexing and archiving documents of a certain type (such as invoices) and speeding data entry. The new Import Wizard lets users select and upload several files at once, making it faster and easier to bring multiple documents into the system. There's also an improved Query designer that includes calendars and date logic and the ability to search on multiple folders across repositories.

Pricing and Compatibility

FortisBlue pricing starts at approximately \$3,000 for two users and ranges to the mid-twenties for 25 users depending on the number of seats and functionality selected. Standard support and maintenance contracts are available based on a percentage (typically 20 percent) of the product cost.

FortisBlue is compatible with TWAIN- and ISIS-compliant scanners and scan-enabled networked MFPs.

System Requirements

SERVER

2.5-GHz dual-core processor
4-GB RAM
200-GB hard drive space
Microsoft Windows Server 2003, Server 2008, Server 2008 R2
Internet Information Server (IIS) 6.0 or later
Microsoft SQL Server 2005 and 2008 (Express and Standard Editions)

CLIENT PC

1.8-GHz Pentium 4 processor
1-GB RAM
Microsoft Internet Explorer 8 and 9, Firefox 3.6 and 4