

## Westbrook Fortis 2.4.2



### Features and Benefits

- Seamless integration with Microsoft Office
- Enables remote access to documents
- Shares documents and data with line-of-business systems without custom programming
- Increases productivity with batch indexing and full-text search
- Compatible with any network-connected MFP or scanner
- Cost-efficient document management solution

### Selling Propositions

- **Cost effective:** Fortis streamlines the document management workflow process, increasing productivity and saving money. The company estimates ROI within 12 months of deployment.
- **Complete control:** Gives complete lifecycle management for paper and electronic documents from capture, indexing and archiving, to retrieval and automated purging.
- **Automated workflow:** Lets organizations implement new business processes quickly, in the software, without having to re-train end users.
- **Remote collaboration:** Staff can access documents remotely and collaborate with one another.

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### Business Challenge

Businesses of all sizes are experiencing information overload: the barrage of papers, e-mails, electronic documents and other forms of content that circulates on a daily basis. From small to enterprise-sized businesses, being able to store and then retrieve a needed document manually can be a time-consuming and expensive task. Westbrook Technologies' Fortis document management software can help automate the process, by capturing and centrally storing paper and electronic documents that can be archived, searched, accessed remotely and collaborated upon.

### Target Market

Fortis is designed for any number of users, and is scalable from three users to a full enterprise implementation. It is suited for virtually all markets, including government, legal, and agricultural organizations. According to the company, it is experiencing the greatest growth among healthcare, manufacturing, education, service industries, distribution and logistics markets.

### Features

Fortis document management software helps organizations capture, index, and store documents in one centrally located system. Fortis can incorporate scans, faxes, and imported electronic documents into the system. Electronic documents that can be captured include HTML files, images (color and black-and-white) as well as Word, Excel, Outlook, and PowerPoint files. Built-in Microsoft Office integration enables users to capture information right from within Office, eliminating the need to toggle between the two applications. Fortis includes OCR (optical character recognition), BCR, (bar code recognition) and Image Enhance to increase capture efficiency.

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.

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Searching for stored documents is efficient through targeted searching. Fortis lets users define and perform queries to retrieve documents by searching the index data either via a Full Text search, which searches all the text in a document; via annotations text, which as it sounds, searches the text written in the notes; or a combination of both.

Fortis enables users to view and edit stored documents. The Launch feature allows users to launch a Microsoft Office application, such as Word, from within Fortis to make the edit. Depending on the document, a user can edit, cut, copy, paste, or delete a page or text within the document. (The changes are automatically saved to Fortis, with no need to re-import 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.

There are several ways to share and collaborate with colleagues, clients, and staff. Fortis Web works over the Internet, and allows users to search and view documents remotely. Fortis Webflow enables users to set up a step-by-step workflow to route information quickly and efficiently.

Security features are customizable by the administrator and include passwords and multiple levels of permissions. The Audit Trail lets administrators set up a log that follows all activities performed on a document, including viewing, faxing, forwarding, e-mailing, and printing.

New features to the latest version include Fortis Web Services, which allows Fortis partners to take advantage of Services Oriented Architecture methodologies to more easily integrate Fortis with other application suites. Fortis Webflow is an optional Web-based workflow module that users can install to manage processes that are driven by decisions made by end users such as invoice processing, time-off requests, and purchase order approvals.

## **Pricing and Compatibility**

Fortis SE, which is appropriate for smaller businesses and has a cap of 20 users, ranges in price from \$5,000 for 3 users up to \$25,000 for 20 users. Customers can add more seats by upgrading to Fortis Enterprise system (including Fortis Web for Web access) with additional licenses and modules added incrementally.

Fortis is available in the U.S., Canada, Latin America, Europe and Africa.

## **System Requirements**

### **SERVER**

1.5-GHz Intel Pentium 4 or 1.3-GHz AMD Athlon processor  
1-GB RAM  
Ultra ATA 100 EIDE / Ultra160 SCSI with Adaptec SCSI Controller, WHQL Certified RAID  
Microsoft Windows Server 2003 (SP2) or Server 2008

### **CLIENT PC**

1.5-GHz Intel Pentium 4 or 1.3-GHz AMD Athlon processor  
1-GB RAM  
Ultra ATA 100 EIDE (SCSI hard drive recommended)  
Microsoft Windows XP Professional (SP3), Vista (Ultimate, Enterprise or Business), Windows 7 (Enterprise or Business)