



## Fortis Webflow

### Define processes with a Web-based workflow tool

#### Fortis Webflow Features:

**User-defined Rules** – Creates rules in an intuitive, step-by-step progression. Customize an action so that, for example, approve or reject requires that comments be entered into a specific field to complete the step.

**Thin-client Architecture** – Built on **Fortis Web Services** and fully accessible over the Internet or an intranet.

**Out-of-Office Delegation** – enables users to designate a substitute when they are not available to perform their tasks.

**Work Queues** – A user-friendly view of documents that require action.

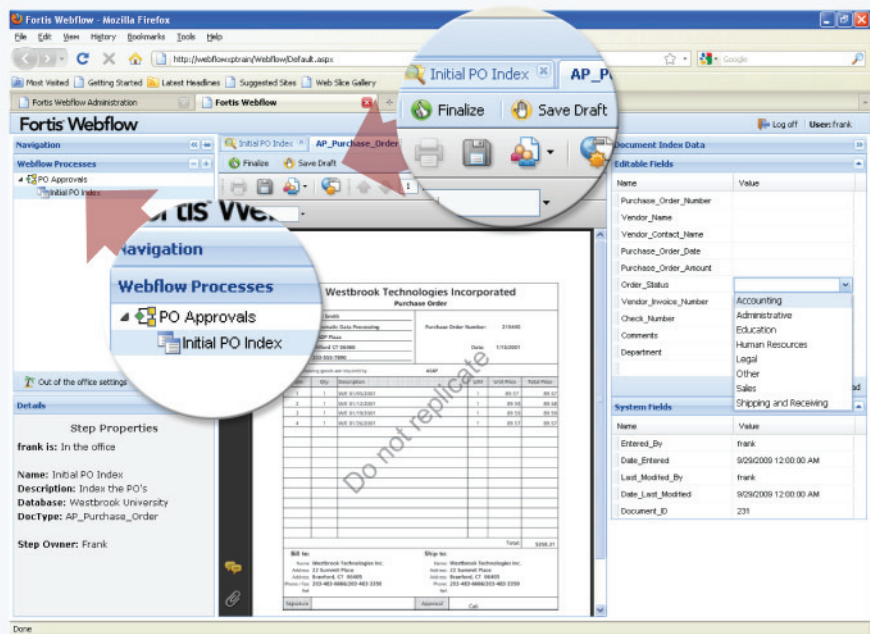
**Document-level Security** – Enforces security policies on who can edit, print and make copies of documents.

**Email with Attachments** – Provides ability to send the notification with an attached document that can be viewed for reference outside the **Fortis Webflow** interface.

**Watermarking** – Superimposes notifications such as “Do not replicate.” Watermarks can be applied or removed at any step in the process.

**Step-level Permission** – Simplifies administration when users change roles by assigning permission to each step, rather than to a specific user.

With **Fortis Webflow**, anyone who manages a manual, document-intensive process can replace it with a dynamic electronic workflow. You can eliminate bottlenecks and speed up common processes such as insurance claim resolution, purchase order approval, time off requests, performance reviews and engineering change orders with **Fortis Webflow's** built-in notifications and electronic routing. By implementing **Fortis Webflow**, organizations can dramatically reduce operating costs by eliminating faxing or mailing paper copies, automating escalation and out-of-office delegation, and shortening cycle times.



An invoice awaiting the first step of the approval process

#### Step-by-step simplicity

**Fortis Webflow** has a Rich Internet Application (RIA) user interface where users and administrators can create workflow processes to link steps together in a logical sequence. Workflow participants only see the steps they are responsible for completing. Permission is assigned to a step, not an individual. If a person changes jobs, that step is then assigned to their replacement.

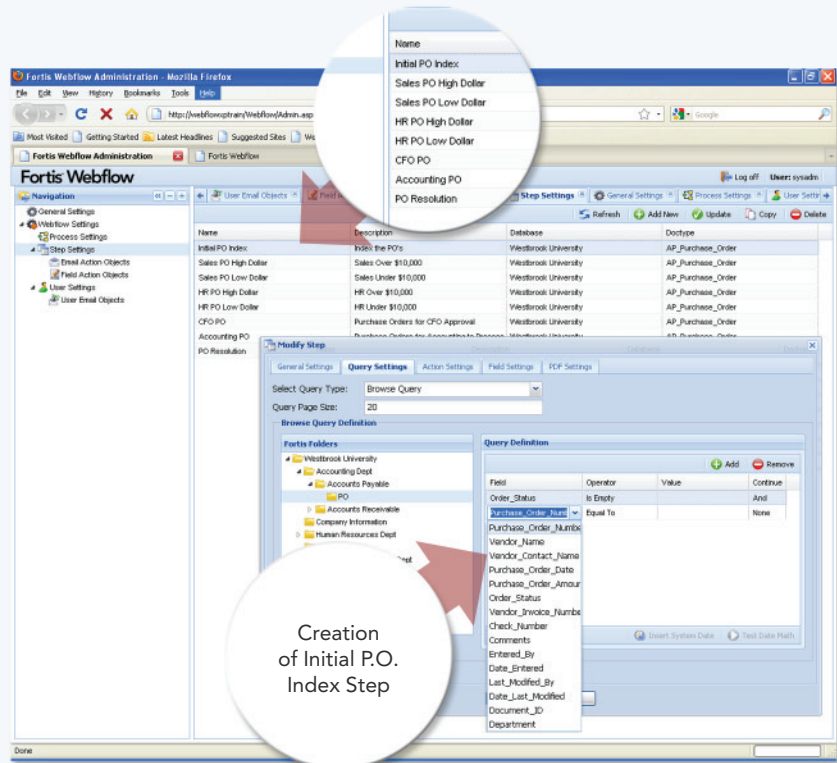
All documents are rendered to a PDF for viewing. Administrators can assign specific security policies to a document at each process level. For example, a clerk might see a watermark that says “do not replicate” since he only has permission to index the document without printing or editing capability. In the next step, an “approver” may be able to print and edit the document.

### With Fortis Webflow you can:

- Accelerate and ensure completion of critical tasks.
- Easily define decisions and actions with step-by-step flow.
- Monitor **Fortis** databases to route documents according to predefined business rules.
- Use workflow to send documents to specific folders, send email notifications, and run external programs.
- Automate data exchange with line-of-business software.

### Manage Common Business Processes with Fortis Webflow

- Purchase orders
- Sales lead management
- Custom quote requests
- Expense reports
- Return authorizations
- Engineering change orders
- Travel requests
- Benefits enrollment
- Proposal preparation
- Performance reviews
- Order processing
- Quality Control reports
- Recruitment evaluations
- Internal surveys
- Time sheets
- Product improvement forms
- Capital appropriation requests
- Time off requests and approvals



Invoice approval process steps

### Set your processes in motion

The **Fortis Webflow** workflow engine runs in the background on a predetermined schedule. When a document meets the query criteria, workflow kicks off automatically. With the workflow engine, an experienced administrator can create complex processes using simple rules that are initiated without user interaction. Based on data in **Fortis**, the workflow engine modifies index data in the document and/or moves the document into another folder.

### The workflow engine can be used for:

- Escalations and notifications
- Enforcing retention schedules
- Distribution

