

## The Key Component to Optimizing Your Business Processes

### Benefits of Fortis

- Increase productivity and optimize your work effort.
- Enable timely and informative decision making.
- Promote quick and accurate service to customers or partners.
- Reduce operating and administrative costs.
- Accelerate project completion and shorten business cycles.

### An introduction to Fortis document management

Many organizations face the challenge of managing and accessing business information from disparate sources. For example, an organization might maintain some documents within traditional paper filing systems while other content is electronically stored but not easily accessible. Oftentimes, employees engage in manual, time-consuming searches to locate and retrieve vital documents to complete a business transaction or make a business decision.

These disjointed and often frustrating searches, combined with an overwhelming increase in the amount of information an organization must manage, result in costly delays, decreases in productivity, skyrocketing operating costs and general inefficiencies. To establish or maintain a competitive advantage, organizations must find a solution to streamline their processes and make productive use of the content on which their business success depends. Document management applications are often the key to optimizing business processes, improving information retrieval and

document access and expediting the delivery of information.

Document management solutions provide tremendous efficiency gains by allowing organizations to capture, store and retrieve paper-based and electronic documents into one system. With a document management system, information is readily accessible and centrally located - meaning employees no longer spend time routing documents from desk to desk or trying to locate a misplaced file. A document management system provides instant access to information and promotes an efficient use of resources.

Offering significant time-savings, document management systems help organizations improve the quality and effectiveness of business activities. As tedious manual searches are eliminated, employees can refocus their time and efforts to extend customer relationships, discover new business opportunities and focus on revenue growth - activities that are fundamental to success.

### Fortis provides organizations with business point solutions in:

Accounts Payable, Accounts Receivable, Compliance, Credentialing, Customer Service, Human Resources, Order Entry, Purchasing, Work Eligibility and more!

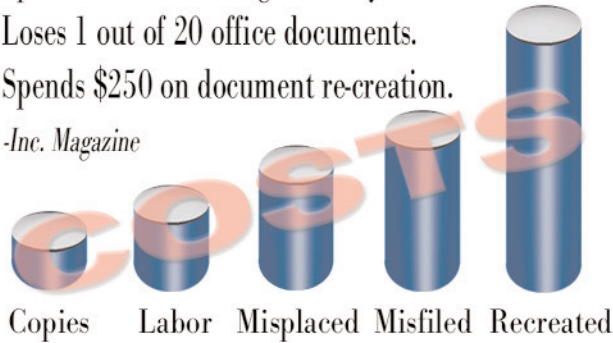
Visit [www.stewartind.com](http://www.stewartind.com) or call 1 800-322-5584 to find out how your organization can streamline business processes, comply with federal and industry regulations and benefit from improved operational efficiency.



## A Coopers & Lybrand study shows that the average office:

- Makes 19 copies of each document.
- Spends \$20 on labor for filing each document.
- Spends \$120 searching for every mis-filed document.
- Loses 1 out of 20 office documents.
- Spends \$250 on document re-creation.

-Inc. Magazine



### Benefits of Fortis document management

Westbrook Technologies, a leader in document management software, provides solutions to businesses of all sizes that need to maintain their competitive edge. Our Fortis solution assists thousands of users throughout the world capture, index, store and retrieve their critical decision-making information from anywhere - instantly and securely.

A comprehensive software suite with powerful capabilities, Fortis allows organizations to:

#### Increase productivity and optimize their work efforts

With immediate and reliable access to content, users can efficiently retrieve the information they need to complete their business tasks. Making productive use of information enhances performance and empowers users to identify and pursue other business opportunities or beneficial activities.

*A successful healthcare practice increased their productivity by 270% with Fortis, as nurses no longer spend several hours a day searching for patient charts. This efficiency gain lets nurses devote more time to patient consultation and care.*

#### Enable timely and informed decision making

As content is centrally located, users can be assured that they have all the necessary information to make a decision. A single access point ensures critical information can be produced on demand - all the facts, figures and supporting data are readily available.

*Attorneys in one infamous legal firm can be sure their legal strategies are sound. With Fortis helping them manage*

*millions of documents - witness testimonies, reports, briefs, correspondence, etc. - a simple search lets them access pertinent documents needed to plan their next legal move.*

**Promote quick and accurate service to customers or partners**, resulting in increased customer satisfaction and revenue growth.

With targeted searches, users can instantly access documents to provide technical support, answer inquiries, resolve a complaint, check the status of an order, claim, or information request - activities that improve service levels and garner customer loyalty.

*An international jet manufacturer is hitting the mark with customer service. With blueprints and illustrations available from the desktop (compared to the weeklong wait to receive information from headquarters), the technical help desk is finding it much easier to provide critical and precise information to their clients.*

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**Fortis saves one medical clinic close to \$1.3 million per year in records maintenance costs and about \$300,000 in liability insurance costs.**

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### Reduce operating and administrative costs

Printers, copies, microfilm, storage space, retrieval efforts, shipping charges, maintenance costs, etc. - expenses that can greatly impact an organization's profit - not to mention the costs associated with misplaced or incorrectly filed documents. Fortis allows organizations to reduce the expenses associated with paper-based processes and realize savings in other areas.

*Fortis saves one medical clinic close to \$1.3 million per year in records maintenance costs and with nearly 60 years of paper medical records securely stored in Fortis, this clinic also benefits from a liability insurance savings of about \$300,000.*

### Accelerate project completion and shorten business process cycles

With manual processes, reviewing, routing and processing documents can take days, weeks and sometimes even months. Fortis improves business processes to enable the timely completion of business tasks.

*For a vehicle financing company, Fortis has streamlined the review and processing of loan applications. More loans can be serviced and funded within a shorter timeframe, resulting in a better bottom line and satisfied car buyers.*

## Features and Functions of Fortis

Delivering a rich feature set, Fortis allows users to electronically capture, store, organize and retrieve documents and business content. Once users retrieve documents, they can easily view, edit, annotate and distribute documents for quick and easy information exchange.

### 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.

Fortis makes it easy to capture documents and data into the system. With the ability to scan, fax or import documents as well as import documents and data into the system, organizations can be sure all critical information is securely stored and properly managed. Fortis users can capture a wide range of electronic content, including Word or Excel documents, HTML, black and white images, color images, etc.

With Microsoft Office integration options, users can also automatically capture Word, Excel and Outlook files from within the Office application directly to Fortis, thus automating the capture of data and eliminating the need to switch between applications.

Fortis also provides several capture options to improve document quality, aid in data capture, and improve efficiency: Optical Character Recognition (OCR), Bar Code Recognition (BCR) and Image Enhance.

### Indexing and Storing

Content that is captured to Fortis is identified with associated index data so that it can be easily stored, retrieved and managed. The indexing process is essential to how users search for and retrieve information.

The database allows documents to be indexed, or described with keywords, for faster searching and retrieval.

The descriptive information about documents is entered into fields defined by an administrator. Fortis provides numerous methods for indexing documents. Users can index documents manually or automatically, and documents can be indexed in batches (or groups) to speed up the indexing process. Using templates and processing scripts can further increase the indexing process speed.

### Retrieving

Targeted searching is the most efficient way to gather needed information. Fortis lets users define and perform queries to retrieve documents by searching the index data, by searching the text contents of documents, or by performing a combined search.

Advanced search options let users quickly search different types of documents at once and easily narrow the search



results. Users can also retrieve related documents from the document viewing window. With a multitude of search options, users can be sure to quickly find the documents they need to complete a task.

### Viewing and Editing

The Fortis Document Viewer provides complete functionality for accessing and viewing all types of documents. With an intuitive interface, users 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, users 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. Of course, an administrator specifies permissions to safeguard documents from unauthorized edits.

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

### Sharing

The exchange of information is vital to business processes. That's why documents stored in Fortis can be easily shared with colleagues, partners and customers.

Documents can be shared with others by printing, faxing, sending via e-mail, sharing on a network and embedding them as OLE objects. Users can also export documents in a variety of formats, including the Fortis document format, Adobe PDFs or the document's original file format, such as Word, Excel, HTML, etc. Users can also export index data along with the document for use in other applications.

### Securing Content

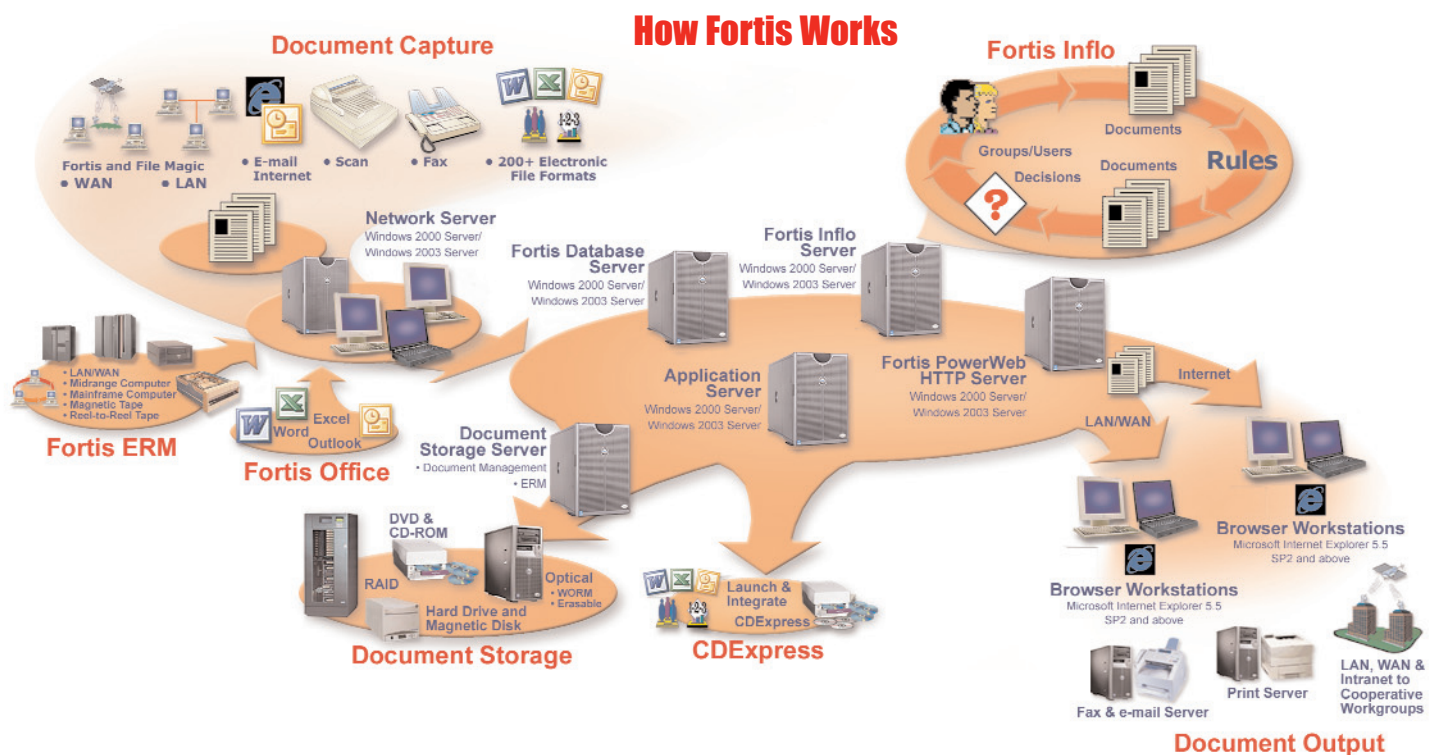
The Fortis system's security capabilities provide a powerful yet flexible blend of user access management and control for any Fortis installation. This security is provided by assigning Fortis users a password and database access and by varying their functional and feature access permissions.

With multiple levels of permissions, you can be assured your documents are securely stored in Fortis. A Fortis administrator

customizes the level of access for individuals or groups of users so that content is protected from unauthorized users and confidential content is never compromised.

Fortis eliminates time-consuming paper chases and electronic directory searches in favor of immediate search and retrieval, thereby producing higher levels of productivity and a rapid return on investment. Working in real time with documents, users can make more timely and precise business decisions.

With options for Microsoft Office integration, ERM (Electronic Report Management), CD/DVD publishing, a Web-based version – Fortis PowerWeb, a workflow feature – Fortis Inflo, and an electronic authorization process – Fortis ApproveIt, Fortis can help organizations solve any document or information challenge.



Enterprise Document Management for the Mid-Market



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