Intelligent Management
in businesses and e-Administration

athento
understanding documents

Athento versus the problems and needs

of document and content management faced

daily by businesses and

government e-administration

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Problems, needs and values

Document management has traditionally been understood as the development of **techniques** based on physically working with paper, or with classical ECM platform for business, such as Microsoft's Sharepoint, IBM's FileNet, Oracle's UCM, OpenText or Documentum by EMC, all of which were meant **to classify, archive, search, create versions of and share documents.**

Recently, a number of new companies have appeared on the tech market. The main objective of these companies has been to bring document management solutions to other companies, offering more competitive pricing, without sacrificing quality, as is the case with Documentum, Knowledgetree or Nuxeo. These solutions, however, are still based on classic document management techniques: they all require human intervention for certain activities, such as classifying documents, or starting the process of working with a document.

Some 60% of organizations that decide to implement a document management system do so mostly to find a solution to the chaos of information management, more than for any other important reason, such as cost reduction. This is because, these days, the information overload that exists inside organizations is one of the gravest problems detected in the information society.

The excess of information coming into an entity, as a consequence of the massive increase in sources of information (among other aspects) causes the growth of the volume of information to be well above the development capacity that the human resources of any organization can usually count on.

In effect, although many organizations are already using some sort of management solution that allows them to share and organize documentation, more than 40% of them think that their electronic information (with the exception of e-mails) is not totally accessible, correct or trustworthy. This is so true that **60% of organizations say that it's easier to find useful information on the internet than in their own systems.**

It's obvious that this type of problematic situation can't just be solved with the implementation of document management software alone. It also requires the design of specific (and costly) strategies for the management of information at the business level. That means including tasks such as the design of metadata within a taxonomy, establishing a classification table, designing and creating a prototype for the intelligence of the business, or the design of an architecture oriented towards services, for example.

Athento is an ECM solution which is built starting from experience gained from classical management, and which adds a fundamental factor for success: a system of intelligent management.

Such a system allows us to make use of classifications and distributions of documentation automatically. That means that tasks like initiating procedures or the classification of them does not require human intervention.

CATEGORIZE AND STORE YOUR DOCUMENTS AUTOMATICALLY.

INFORMATION IS AVAILABLE 24 HOURS A DAY, EVERY DAY.

Is the Athento platform for me?

In a recent study conducted by AIIM, where organizations of all size (from eleven employees to well over 10,000) and from all sectors of government (local, regional and national), business (finance, telecommunications, manufacturing, education, engineering, health, IT, transport, construction, etc.) and different areas (the Americas, Europe and Australasia, among others), it was shown that only 5% of organizations confirmed that they had no future intentions to incorporate a document management system in their business.

This means that:

More than 90% of organizations, developed within the information society, consider it indispensible to have an ECM platform, complete with practical applications which improve access to content, in a collaborative environment.

In this context, Athento presents itself as an ECM platform which offers users a purely collaborative focus.

This type of environment has the capacity to give organizations a significant number of advantages towards document management. The numbers prove it:

- In a recent study related to this topic, some 60% of people polled declared that **working together with their co-workers helped them to better develop their work-related functions.**

- **Cost reductions**, which any organization that adopts a collective focus in the development of their functions (whether it be for human resources, travel or infrastructre), can reach 80%

For all of this, a collaborative document management platform such as Athento can offer any organization the following opportunities for the way they treat their documents:

- **Cataloguing documents.**

- **Processing document content, independent of what the document origin is.**

- **Carrying out activities beginning with processing** and cataloguing. This could include initializing accounting procedures from a new invoice, sending a notification regarding the finalization of a project with a specific client (when a certification arrives or when the final part of a project has been finalized) or creating work spaces for collaborators (for collaboration documents between partners.)

- **Archiving documents automatically** and according to the requirements of what the business needs, as well as any legal criteria for document retention.

- **Recovering archived or stored documents easily**, using different navigation models through document repositories as well as different search modes.

There are many videos that show how automatic data capture works with invoices, automatic labeling of documents, creating automated workflows that are based on types of documents (which Athento can do automatically.) [23]

What does Intelligent ECM software bring to my organization?

Athento is more than an ECM platform, it is an intelligent ECM platform. This is because:

- It's designed to **construct applications** that have been specifically adapted to the client's needs.

- It's based on an architecture of components that has been designed to grow as your organization does.

- It's the basis of intelligent document management that your business needs because it works on its own and is able to learn from its own mistakes and **to work with user feedback**.

- In conclusion, it's an intelligent platform because it has behaviors that are capable **of working with your organization to make your document management more efficient.**

In the next few pages, we'll bring you case studies that will help to illustrate the capabilities that a system of this caliber has.

- **E-mails or inquiries sent by clients can be automatically understood and filtered** (either from the web or from any other application) so that they go to the right people to answer them.

- **Getting a relevant, acceptable answer every time carry out a search**, even if the terminology that you used might have different meanings – and allowing those results to come from multiple sources, like on-line advertising, comments, Twitter posts, reports and other unstructured data.

- **Document analysis**, categorization and auditing,   etc.

- **Identification of competitive information**, the areas for potential crises and strategic information that comes from both internal documentation and from the Internet.

Athento, the intelligent ECM platform, currently provides all of these functionalities, and that makes it the leader in the ECM market.

When we talk about an intelligent document management solution, we are talking about those semantic technologies which don't just extract information from a document: they also add additional information without the need for human intervention. This way, we can bring complete document management procedures together, from the moment the documents are created to the time they're archived or destroyed, with a minimum of human involvement.

The benefits provided by this new document management paradigm **can produce reductions of up to 90% in the time it takes to process, scan and digitalize documents.** [14]

A case study carried out by the Minnesota Department of Revenue (MDOR) [15], which provides information on taxation, returns and paid services, has revealed that implementing an intelligent capture solution produced extraordinary results for asset performance, including the following facts which stood out:

- A reduction in tax return processing time, going from thirty to forty days, to under ten.

- A reduction in the processing time of tax returns, from ten days to three.

This allowed the MDOR to process 95% of tax returns within five days of submission, improving services to taxpayers.

There are many other examples of companies and organizations who have satisfactorily implemented intelligent ECM in their businesses and become more productive as a result. [See references 5, 6, 7, 8, 9 and 10.]

The Spanish General Traffic Directorate and the Ilustre Colegio de Gestores Administrativos de Madrid, recently implemented a finished project with excellent results. [21, 22]

I already have document management procedures and an information system in place...

The Athento ECM platform integrates into any computer system as if it were a piece of Lego. The experiences of integration into existing systems in organizations and businesses of varying sizes has resulted in implementations carried out in record time. One particularly interesting case is that of integrating of Athento with the MOAD (Modelo Objectivo de Ayuntamento Digital, Spanish for Digital Town Hall Model Objective), whose objective is to offer solutions for carrying out electronic processes at town halls that have limited resources. This integration was also carried out in the regional government in the Málaga region in under a month, which meant substantial savings of resources.

The existence of procedures also provides the integration of these within the document manager. The existing procedures can be implemented on the platform, automated inside the document processing process, and connected with the data capture activities of information and distribution of documentation to all interested parties.

The platform architecture allows the integration of the processes to also be resolved in unbelievably fast times, which means **that procedures are available to be used and executed in under two weeks.** [8]

Making Productivity More Powerful with Digital Signatures

In any government agency, whether it be local, regional or national, one basic element is necessary to manage any document: a signature. Signing a document gives the document a series of legal aspects that makes it a very powerful mechanism to move administrative procedures ahead, in any kind of entity:

- **Authenticity**: signatures usually have to be witnessed by a trustworthy third party, who verifies that the process has been carried out correctly and that subsequent steps can be taken.

- **Integrity**: the physical signature can be created in such a way that, if it's altered in the document, it can be detected immediately.

- **Privacy**: the digital signature is usually personal and difficult for third parties to copy, which means it is completely private.

- **Legal requirements**: Signatures signed on paper are easily verified by the participating parties.

- **Ownership**: One of the most important features of the signature is that none of the parties involved is able to deny the signature in the future, or any of the terms or conditions contained in the document.

All of these qualities must be equally valid if the document is signed digitally.

What usually happens is that people sometimes refer to two potentially confusing terms, electronic signatures and digital signatures. Only the second type is able to offer the qualities described above.

- **The electronic signature is based on the digitalization or scanning of the original**, hand-made signature created by the parties (or a photo of said signature.)

- **A digital signature adds extra information to a document**. This allows for the certification of both the person/entity who emitted the document, as well as the data of the document, using a public key.

It's possible to combine both options, but the second is mandatory so that the document has the same validity as a document signed by hand.

So why should people change the classic model, which seems to be working, and move to the new model? Put plainly, it's because, in reality, **the classical model doesn't work**. Public entities are more aware than anyone of the problems that a physical signature can cause. It's known that **up to 40% of users who don't have a digital signature suffer from administrative bottlenecks because of the need for that physical signatures**, which means that up to 23% of those users suffer delays of more than a week for this reason. [16]

However, even making the process of approval easier, while saving processing time are the most valued benefits for those who have already implemented such a system, there are also other, more important reasons to think about: **the cost savings are considerable.**

We only have to keep in mind that, for 63% of organizations that do not currently have digital signature systems, **on more than half of the documents printed, they're only produced in order to add a signature.** In fact, an average of 3.5 additional photocopies or fax copies of a document are produced, for that reason alone.

The cost are significant enough that **63% of organizations that implement document management with digital signatures get their original investment back in the first year – or before.** [16]

Athento certainly cannot leave this important need to resolve aside. That's why Athento contains two characteristics which makes it unique among document management platforms:

- It implements a digital signature solution.

- It provides an incredible capacity to adapt itself to third-party signature tools.

As an example, it's worth pointing out a recent integration with the platform of the well-known @firma tool, available in the free software repository that is open to government agencies of the *Junta de Andalucía* (the Andalusian regional government in Spain.) Integrations with other products, such as Víafirma (a digital signature and authentication platform) have also been carried out. [19]

The Free Software Model

The choice to use free software for this platform was not made arbitrarily. Some 64% percent of organizations which implement an ECM software do so with free software solutions in mind, mostly for reasons such as cost savings, security or the ease of use.

Additionally, free software is continually being improved, especially in terms of ease of use and performance. More than anything, this is due to the experience that communities of developers have invested, with the objective of offering the highest levels of quality and satisfaction to the businesses and organizations which use this kind of software.

These communities also provide organizations and businesses with the possibility of accessing a wide variety of potential providers, thereby avoiding vendor lock-in – blockades between clients and providers. [20]

How long does it take to implant the Athento platform?

Implementation of the Athento platform is carried out following agile methodologies for development and implementation. This guarantees that, in shorter periods of time (between two and three weeks), the system can be up and running and producing a document management application.

The work methodology used by Yerbabuena Software, based on agile methodologies like SCRUM, allows for adaptations to be made to the functioning of the organization needed, and can, in turn, make any adjustments needed to the budget at any moment. This guarantees a perfect relationship between the organization and its document manager.

Yerbabuena Software also provides your organization with measurement and evaluation strategies for the current state of your document management system, so that it's possible to carry out periodic objective evaluations on the improvements with respect to previous measurements, especially with critical metrics such as carrying out document work flows, searching for internal information or the digital signatures of files composed of documents.

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