

# C A S E S T U D Y

*Eurolife ERB Insurance* plans, features and promotes insurance products and services covering all the needs of modern man. It already has over 10 years of successful business presence and has created innovative and flexible products, which shaped a new reality in the insurance product market.

## PROBLEM

The document management needs of a company specialising in insurance are complex and numerous. In fact, the production, search, retrieval processing, and the archival of the documents are some of its most vital functions

It is therefore obvious the the degree of difficulty for the management of such a vast volume of documents is quite high. The aforementioned Document Management applications present a solution for such highly complicated systems.



## APPROACH

EUROLIFE ERB's needs for document management and filing have been covered with OpenText eDOCS DM, whose customisation & support services have been undertaken by Your Ideas, OpenText's reseller in Greece.

The solution covers two large fronts:

- ◇ the complete automation of registering incoming and outgoing documents of ERB INSURANCE SERVICES S.A.
- ◇ the automatic filing and indexing of the insurance contracts and other client documents of the customers of Eurolife ERB A.E.A.Z. (life insurance class) - Eurolife ERB A.E.Γ.A. (general insurance class)

## SOLUTION

### I. DOCUMENT REGISTRATION OF ERB INSURANCE SERVICES S.A.

According to the procedures the company followed, the incoming and generated documents were to be registered and filed by the secretariat. In the same vein, document searches also went through the secretariat, after an employee petition.

This clearly caused filing issues with were mainly focused on search methods, production (and reproduction) of paper as well as its physical storage. With the introduction of OpenText eDOCS DM and its integration with the already existing Fax software, this procedure was completely automated which resulted in:

- ◇ The incoming documents were filed automatically in OpenText eDOCS DM in any form necessary: printed, e-mail or fax

- ◇ The classification of each document is suitably carried out from the users as to facilitate effortless searching.
- ◇ The various client documents that are generated through a third party application(i.e. letters) are filed automatically into the DM without the need for user intervention. Accordingly, the outgoing ones are filed from the users prior to being sent, either through e-mail or through fax, or even through a postal service.

## II. AUTOMATIC FILING OF INSURANCE CONTRACTS & CLIENT DOCUMENTS OF EUROLIFE ERB A.E.A.Z (life insurance class) - EUROLIFE ERB A.E.Γ.A. (general insurance class).

Eurolife ERB A.E.A.Z. (life insurance class) - Eurolife ERB A.E.Γ.A. (general insurance class) uses an application for the generation of the contracts and general documentation of the insured. The number of important documents is great (to a magnitude of millions), and the need for a fast and reliable search functionality based on the characteristics and contents of each document is even greater. Up to this point these documents were stored in some folders in a workstation, without any extended search capabilities and bereft of easy access from any networked user.

The solution provided the following:

- ◇ The contracts are filed automatically during their creation from the already existing application, without any kind of user intervention.
- ◇ Already existing documents were imported en massé in the OpenText eDOCS DM through a special assistive application that was developed.
- ◇ The document classification form was created here to cover the various needs of this specific application.
- ◇ The large volume of documents that have been imported into the system does not, in any way, affect its productivity.
- ◇ The users, be they local or remote, have access to search functionality utilising multiple criteria as well as words or phrases included in the documents, with a minimal response time(a few milliseconds).

## RESULTS

After the implementation of the above solutions in ERB Insurance Services S.A., there was a substantial and direct utilisation of the information processed as well as:

- ◇ Minimisation of the use of paper in Insurance services, since all the documents are generated or converted upon their entry to the system to a digital medium.
- ◇ Filing of documents upon their creation, in a central digital archive, which resulted in the abolition of local folders & the capability of information sharing/utilisation by all (authorised) users of ERB INSURANCE SERVICES S.A.
- ◇ The users don't need to know in which physical or digital space the sought after file lies; it is enough to know some identifying characteristic of the document.
- ◇ Swift searches via multiple means such as combined search or raw text search.
- ◇ Maximal document security and protection.
- ◇ Registering process automation without the need of intervention from the secretariat.
- ◇ Integration with email & Fax Server so that all documents are treated in the exact same manner without the need for further record keeping in the aforementioned systems.
- ◇ Document processing from users that reside in differing locations. The solution can even be utilised by users outside the local network, through a browser.



**Solution for  
 Registration, Filing / Management  
 & Automated Filing of Insurance  
 Documents.**



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*Your Ideas founded in Athens in 2002 by experienced members of the Greek IT community with the objective of offering technologically advanced solutions in the design, automation & management of vital business processes as well as in collecting, organising, archiving and managing corporate data, in tandem with reliable service and comprehensive support.*

*The executive workforce is made up of field specialists who enjoy long term experience in their chosen field. The employees possess high technical training and experience in the spheres of realization, application, modification, localisation and maintenance of such systems.*

***We emphasize the importance of innovation and diffusion of knowledge.***

***We work closely with our customers in order to develop and deliver the best solutions for them.***

*Your Ideas has implemented and delivered turn key solutions in more than 60 organisations and 2500 users, in various business sectors as, Financial Services, Public sector, International Institutes, Government, Shipping, Nonprofit organisations, Municipalities, Commercial companies, Pharmaceutical Industry, I.T. companies, Healthcare, Construction, Education & Research, Advertising, e.t.c.*

*Your Ideas' solutions enable clients to reduce the mediation period from the decision of investment up till realization, active exploitation of existing information, reduction of running expenses complemented with simultaneous improvement in internal operation and quality provision. The above all lead to the expansion in competitiveness.*

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