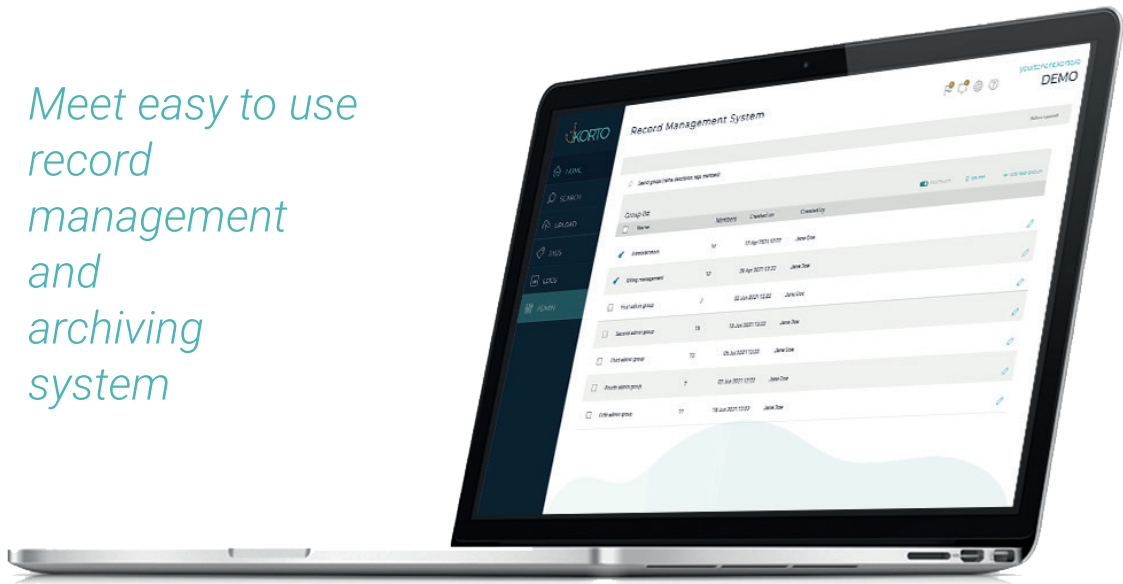


Your records need
an ↻Anchor



*Meet easy to use
record
management
and
archiving
system*



It is named after the famous sailor and dreamer, Hugo Pratt's legendary Corto Maltese, to symbolise a reliable anchor for customers' records. KORTO helps them to achieve compliance in a seamless, unintrusive, and enjoyable way.

Records Management

Records Management is difficult. Or maybe it is not, but has merely been perceived as such. It was always that thing which was needed in order meet legal requirements, but at the same time was difficult and expensive to implement, and was actively disliked by most employees, who viewed it as an unnecessary overhead and yet another chore to be added to their busy daily schedules.

This complexity has resulted in many European companies, especially SMEs, not being compliant with European Union (EU) records management regulations, which were recently further affected by the introduction of strict privacy laws.

KORTO is the result of an entirely different vision.

KORTO was born from the premise that Records Management is your friend. It stands by you when you must find that one document from a project that was archived many years ago. It helps you to destroy, at the proper time, any private records you may hold about employees, customers, and partners. It is your best aid in all litigation and audit scenarios.

How did we do it?

- ✓ We have been analysing the difficulties our customers have with current Records Management systems.
- ✓ We have been hearing about their needs and their secret wishes.
- ✓ We have been talking to the industry and to legal experts in the EU and in Switzerland, to ensure that we're not missing something.
- ✓ We have been recruiting our customers for pilot projects, to make sure that they enjoy using KORTO and find it useful and friendly.



KORTO
is your friendly
anchor and aid
during the entire
records lifecycle.

KORTO is European at its core:

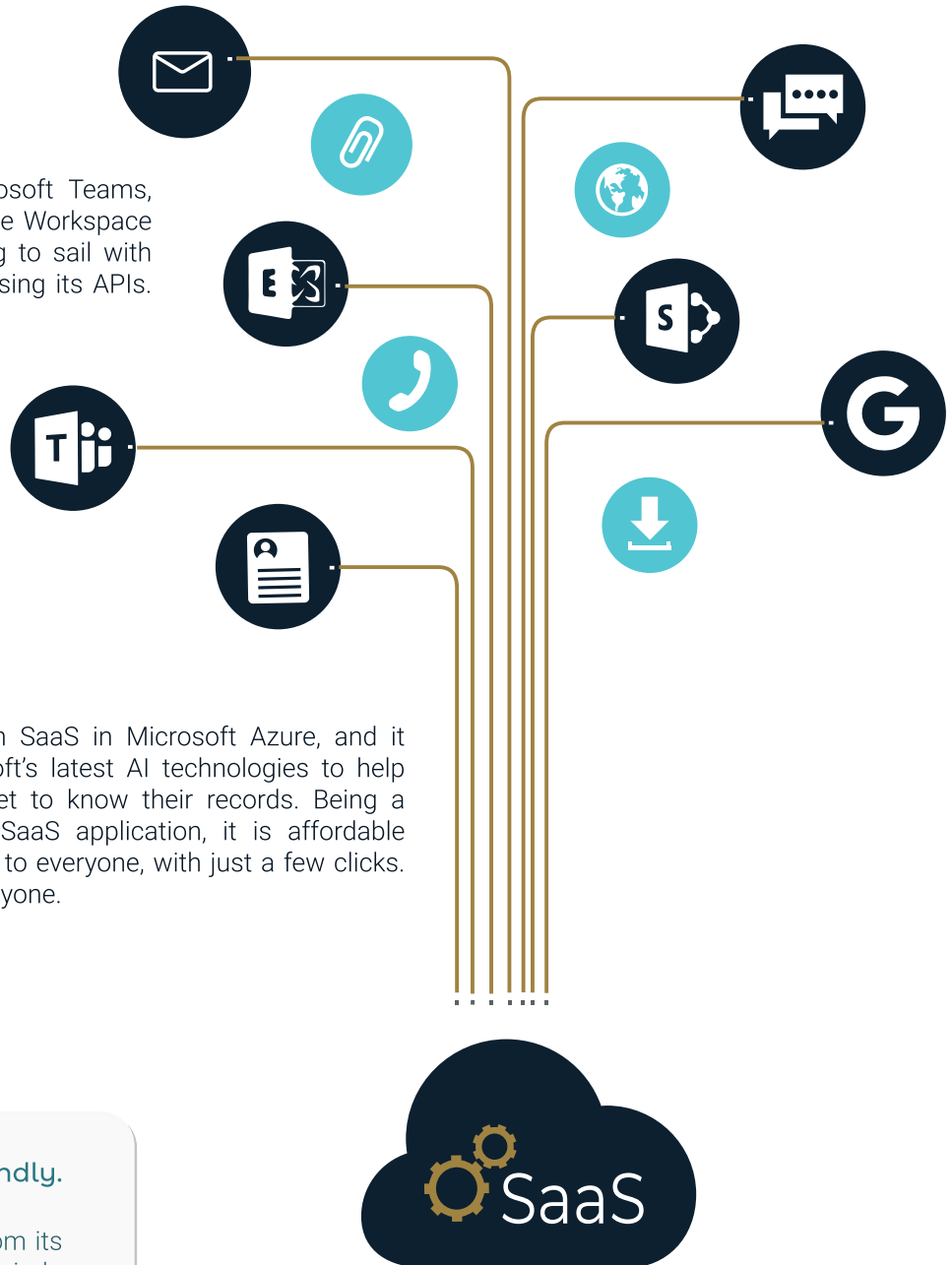
it came about through the joint efforts of people in Switzerland, Germany, Croatia, Italy, and Estonia.

KORTO's best friends are Microsoft Teams, SharePoint and Exchange, Google Workspace and any other application willing to sail with and shake hands with KORTO, using its APIs.

It lives as an SaaS in Microsoft Azure, and it uses Microsoft's latest AI technologies to help customers get to know their records. Being a cloud-based SaaS application, it is affordable and available to everyone, with just a few clicks. Really, to everyone.

KORTO is nice and friendly.

It inherited its personality from its parents: Insa Group and Südwind.



Records

A record is any type of information that is created or received while doing business. Records take all sorts of forms: a written or scanned document, an e-mail or voicemail, a handwritten note, a chat or a video call transcript, a record in a database.

We shouldn't leave records lying around. They contain important and often confidential information, and we don't want that information to fall into the wrong hands. Besides all the business reasons for managing company records in a proper and regulated way, there are also legal requirements in the EU, Switzerland, the UK, USA, and many other countries, on how records should be managed, how long they should be retained, and when they should be destroyed. Failure to comply with those regulations can have heavy consequences for your organisation.

Many books have been written on Records Management and records' lifecycles, but it all comes down to their creation, retention, and destruction.

Records can be **created** in many different ways. They can be received by e-mail or they can be scanned. A handwritten note can be a record. A transcript of a video call where certain decisions were made is certainly a record, as are chat protocols if they contain record-worthy information.

Once created, records must be managed and **retained** to meet legal, administrative, operational, or other requirements. Different records can have different legal and business requirements and retention periods, and we must ensure that records are never changed during the retention time.

The last phase of the records lifecycle is **destruction**. This must be done securely, and according to the retention schedules. A record of the destruction must be retained.

With its advanced and seamless integration capabilities, KORTO can automatically detect and archive records from your current document management and line of business systems, such as Microsoft 365, Google Workspace, or any other system willing to talk to KORTO by using its APIs.

Using simple but extremely powerful classification and tagging features, KORTO will help you to easily create retention schedules for your records, in this way fulfilling business and legal requirements, and helping you to easily find and act on your records whenever you wish.

Using its powerful **Chronos workflow engine**, KORTO will execute actions associated with your retention schedules, such as record destruction. But you can also create retention extension procedures and destruction delays.



Looking into the shoebox

Classifications

Sure, you can consider your Records store as a huge shoebox. You throw all your records into the box and hope you never have to look for any of them ever again. If you can prove that they have not been tampered with, and if you can demonstrate that you will destroy them at the end of the retention period, you will be OK. But that strategy contradicts itself. In order to know what must be destroyed, you have to know what is in that shoebox.

Most of the Records Management systems on the market replaced the shoebox with a cabinet containing many, many small drawers (a “folder structure”). Each drawer contained numerous little boxes. People would be given keys for the drawers they needed to access, and everyone was promised a nice tidy cabinet.

But this approach has proven to have many flaws.

Here are three of the most obvious.

- Each individual record can be in only one drawer (or you would have to make copies, which introduces an entirely new level of management complexity). Hunting for that record in “wrong” drawers can and will waste a lot of time.
- The keychains that everyone is given in order to manage “their” drawers become large. People borrow and share keys, and it all becomes very difficult to manage.
- But most of all, people don’t like drawers. They have to think about which drawer to put every new record in, who’s got the keys, whether a duplicate should be put in another drawer, and so on. The whole process becomes cumbersome.

As a result, people often just leave things lying around.

Retention and destruction.

We mentioned tags and labels a moment ago. They are the groundwork for all retention and destruction workflows in KORTO.

Let’s say we are obliged to keep all the documents from our Zurich office for six years, and then to destroy them, after first informing the head of the Zurich office. We will use that “Zurich” label to design a Chronos workflow in a quick and easy way (Chronos is a proprietary KORTO workflow technology). We thus fulfil all legal and regulatory requirements, simply and easily.





People like shoeboxes – it is as simple as that.

That's why KORTO has adopted the "shoebox methodology", and then taken it to a completely different level.

Store all your records in a shoebox. Put as many labels, tags, and stickers on them as you want; you are not restricted to only one.

For example, if a record is a contract, related to our Zurich office and to a specific customer, we need not choose between the "Contracts" and "Zurich" and "Customer's name" drawers.

Just put all three labels on the contract. Even better, for any records which we didn't feel like labelling, KORTO uses AI to label them for us. It is your record, you know where it should be, and KORTO will be happy to help you find it.

Integration

Yes, you can upload your records to KORTO through an easy-to-use KORTO Management Portal. But we all know that people forget to do such things. They have their own jobs to do, and Records Management (uploading, tagging, and classifying), is just an added burden.

Let's speak frankly: according to the EU's legal requirements, we should be saving each e-mail attachment, and even each e-mail (if the body text contains records-relevant information) to some Records Management system. But in reality, how many of us do that? It is hard enough to handle all the work that arrives in our e-mail inboxes, without adding records declaration and classification chores. And that is only e-mail. We haven't even started talking about the other records-relevant systems.

This is where KORTO's friendliness and integration capabilities come to the fore. An admin can set rules to determine when e-mails should be classed as records. KORTO will follow those rules, select e-mails accordingly, extract attachments and save them separately, classify them with metadata taken from the e-mail (sender, receiver, date, subject), and use AI to extract even more useful metadata. They will then be securely stored in KORTO, where they can readily be found and used.

If you dock KORTO to a professional document management system such as Microsoft SharePoint, KORTO will take over and understand all the metadata which those documents have in SharePoint, and will convert them to record classifications in KORTO. It will then use AI to find even more classifications within the documents.

For now, KORTO works well with standard file shares, and with Microsoft 365 products Exchange Online (e-mails), SharePoint Online (documents), and Teams (chat messages). Google Mail and Workspace integration will be added soon.

It doesn't stop there. Through its extensive, open, and secure APIs, KORTO can easily be integrated with any document management or line of business system. If your system produces documents, and if those documents must automatically be declared as records, KORTO APIs will make that a piece of cake. Really.

KORTO is proudly a cloud-native app

but we understand that there were songs before radio, and there was software before the cloud. One of the nuggets that we provide is the KORTO printer driver. Yes, a printer driver. You print your documents directly to KORTO, where they are immediately declared as records. There is no software on this planet which cannot do that!

Permissions and Security

Security, audits, and burden of proof

It's not so unusual: you are undergoing an external audit, and the auditors want access to a precisely defined subset of your records. For example, they want to see all the contracts signed at your Zurich office, between your company and one of your partners, in the past three years. The old method would be to hunt for those documents, copy them to a USB stick or some other medium (creating yet another copy, and yet another risk to your records), and deliver it to the auditors. Permissions in KORTO are defined through group memberships: your users can create, access, and modify metadata only of those records with classifications and labels that are available to the groups of which they are members. For example, we can easily enable all or some employees at our Zurich office to access only those records in KORTO which are classified "Zurich".

Let's think again about that audit described above. In KORTO it is easy to create a temporary group (e.g., "External Auditors"), and to assign it read-only rights to all the documents tagged with "Zurich" and "Contracts", and for which the "Created at" date is within the past three years. That way, your records do not leave KORTO. Rather, you let the auditors inside to look at the precisely defined subset of records they asked for, which will be provided to them for a precisely defined time period. This is easy to do in KORTO, and far more secure than copying the data from a Records Management system.

Advanced Audit Logs

Each operation that your users or any external system performs in KORTO is logged, and those logs can be searched as well. If you want to know who changed the tags or classifications for certain records, it is easy to find out. If you want to know to which records a particular tag or classification has been applied, that is easy as well. KORTO considers audit logs to be as sacred as the records themselves. Those logs are the proof of the lifecycle of every one of your records.

KORTO, Electronic Signatures, Electronic Time Stamps, eIDAS, ESIGN and UETA Regulations

In a context of security and traceability within Records Management, it is essential that all security requirements are met, and adjusted with the major legislations. The European Union has created a legal framework and clear set of requirements when it comes to this: the eIDAS Regulation. In the USA, this has been regulated with the ESIGN and UETA regulations.

KORTO is fully compliant both with EU (eIDAS) and US (ESIGN, UETA) regulations, and it supports signing records with the electronic signatures and electronic time stamps.

Record managers and compliance officers can set up the way and the rules how this signing should work, and on which records should these procedures be applied.

Protected by the blockchain.

The immutability of KORTO storage, and tracking the records lifecycle through the extensive and searchable audit log, proves that your records have not been tampered with. But what about the audit log itself? How do you prove that it has not been changed, and that there have been no covered changes of records actions?

KORTO offers integration with the blockchain, which can absolutely prove and ensure the immutability of those audit logs, and the integrity of your records lifecycle and Records Management process as a whole.

Intelligence

natural and artificial

The world of Record Management depends on the record managers: people with a deep and profound understanding of internal procedures and legal regulatory requirements, and of how record classifications work; people who ensure that all compliance procedures are followed.

KORTO will be a great aid to them. It will recommend tags and classifications; it will help them to set required and predefined tags; it will take over system tags from the source system (if there is one); and it will offer to create label tags (with no value) and field tags (with keys and values). These and many other cool and friendly features make the working lives of records managers, if not a joy, then at least bearable.

But KORTO doesn't stop there.

KORTO will analyse and understand your records. If they are scanned, it will carry out OCR recognition and understand the context. It will extract the names of people and places and entities (such as companies) from your records, and declare those as "auto-tags". If there are images in your records, such as schemas and drawings, it will understand them and let you search on them. In the background it will translate your records into your primary language (if you have one), so that your record managers can search KORTO records in that language, regardless of the original language of the record. It will use AI and cognitive services to do all of that.

The result is classification that goes far beyond what record managers can do manually. It is the synergy of the manual, logical work of records classification staff with AI-powered context understanding which makes KORTO so powerful.

Sticking to our example, human records managers will, for contracts concluded in the Zurich office with partner company "X", create the classifications "Zurich" and "Contract" and "Partner X". That will be enough to easily find and manage records based on those criteria. But, AI will add context. It will understand that the contract is about providing consulting services, and which people were involved and are named in the contract, and much more. Now, besides searching for "Zurich" and "Contract", you can search for "Consulting Services" and "John Smith", and KORTO will know what you are looking for, and will show you the results.





Marvees

Marvees specialises in recognising your typical records. Every passport looks similar; so does every bank statement. You get the idea. What you do is to tell KORTO, once only, "This is the passport, this is the name, and this is the expiry date." Or, "This is the bank statement, here are the numbers, and here is everything else you need."

You can then forget about it. Marvees will forever know that document type, and recognize it each time it sees it.

Each time, tirelessly, it will recognize that stored document is a passport, or a bank statement, and then extract data from those documents and promote them to tags and record classifications.

Even better, since it lives in the cloud, Marvees is capable of swarm learning. Maybe another KORTO user has already told Marvees what the statements issued by your bank look like. In that case, Marvees will automatically recognize your bank statements, without you having to explain it again. Within months, the swarm intelligence of Marvees will be able to help you with various types of documents.

The amount of time and money saved with Marvees, as an integral part of KORTO, is immense.

"Developed with the latest state of the art technology, based on secure cloud systems and blockchain, our software is the future of record management systems"

Bernardin Katic
CEO



"We make a living from being passionate, nice, and friendly, and we passed those traits to KORTO. As nice friendly software, KORTO loves having friends. Therefore, it will have a strong partner ecosystem to support those customers who don't have the time or resources to implement it on their own. We invite you to get to know KORTO. We are sure it will become your best friend, if you give it a chance."

Adis Jugo
deputy CEO



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