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SHAREPOINT SOLUTIONS
INTRANET ROLLOUT AT BAPTIST COMMUNITY SERVICES

AN EVOLUTIONARY APPROACH TO INFORMATION MANAGEMENT

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INVOICE PROCESSING

SHAREPOINT SOLUTIONS

EDISCOVERY INSIDER

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ASIC looks into the evidence

The Australian Securities and Investment Commission (ASIC) has issued a tender for an early case assessment (ECA) solution to support its electronic evidence processing on the Ringtail document review and evidence management system.

ASIC is facing a massive growth in the volume of data it must review inside Ringtail, and wants to "centralise and standardise the processing of electronic data and potentially, hard copy records leveraging open enterprise standard database technology."

Each case that ASIC handles can represent from a few gigabytes to multiple terabytes of data. The wide range of sources of digital evidence can include forensic images of disks from seized computers and laptops as well as removable media such as CDs, DVDs, USB drives and portable hard disks.

ASIC's Evidence Services group is currently utilising the following platforms:

- Encase Forensic - for reading electronic media, making forensic copies of the same and extracting user generated files;
- Nuix - for expanding files, such as Exchange databases, "Zip" files and extracting embedded objects, enabling searching of the same and providing options for the rendering and exporting of document groups to Ringtail;
- Ringtail - enables national teams to review and categorise documents and provides evidence management capabilities;
- Kofax – scanning of hard copy documents; and
- Coding tools for scanned and electronic documents.

The data processing and ECA application will be heavily used by approximately 30 evidence services staff in capital cities across Australia and Traralgon in Victoria, as well as 500 internal ASIC staff.

ASIC wants an ECA system with the ability to export documents for review within Ringtail Legal and reduce the need to manually handle data and exports

Christchurch seeks records relief

In the aftermath of the devastating 2011 earthquake, Chistchurch City Council is seeking to accelerate its digitisation program to deal with a spike in property enquires. The Council, New Zealand's second largest, has a typical workflow where property enquiries are retrieved from physical storage and scanned into a TRIM EDRMS.

The impact of the earthquake and subsequent rebuilding is expected to see the scanning workload bump to more than 4 million A3/A4 pages in the 2011/12 financial year (plus more than 280,000 A2 pages). Subsequent years are expected to see this settle back down to around 3 million pages per annum.

To handle this workload, Christhurch City Council is seeking an organisation that will deliver physical records management, archive storage and digitisation and scanning services as a single managed service. The Council has also noted a strong preference for the co-location of these services.

eFLOW takes South Africa Census

Top Image Systems (TIS) has announced that its eFLOW platform has been selected by the South African statistical office, STATS SA (Statistics South Africa), to process the upcoming census as well as all other surveys, starting in October 2011. The four-year contract follows other recent wins for TIS in the census market around the globe, including, Argentina, Thailand and Czech Republic.

With an estimated population of over 50 million, the chosen system had to be capable of accurately processing a large quantity of complex data in a short period of time - 220 million documents are to be processed over a 6-month period. It is the second successive census for South Africa to be processed by TIS's eFLOW.

Calvin Molongoana, Project Director for Census 2011 at STATS SA explained, "We chose a partnership of TIS and DAS as they have given us confidence that they can perform at the level that we demand.."

Why do we file email in folders asks IBM

A new study from IBM Research concludes that people who put incoming e-mails in folders are no better at finding them than those who simply use search.

The study focussed on 345 email users with a client that supports search, folders, tagging and threading. The client was specially developed for the study, Bluemail is a Web-based client that includes both traditional email management features such as folders, and modern attributes such as efficient search, tagging, and threading. The study concludes, "People who create complex folders indeed rely on these for retrieval, but these preparatory behaviours are inefficient and do not improve retrieval success. In contrast, both search and threading promote more effective finding."

The IBM study attempts to answer whether email users create folders to help them refind messages or because they need to keep their inbox manageable. The researchers concluded that people file to clean their inboxes to facilitate task management.

"This result contradicts prior work arguing that people who receive many messages do not have the time to create folders. We also found that the intrinsic structure afforded by threads affected folder-access. People who received more threaded messages were less likely to rely on folders for access. Threads impose order on the mailbox, reducing the need for preparatory strategies. In part, this validates our design.

"Threading in Bluemail draws messages out of folders and into relevant inbox threads, making people less reliant on folders for access. Threads also serve to compress the inbox, reducing the amount that users need to scroll.

"As a result, people who received more threaded emails were more successful in their retrievals. There are direct technical implications of our results. Search was both efficient and led to more successful retrieval, in part supporting the search-based approach of clients like Gmail. However in our study, other behaviours, especially scrolling, were prevalent.

"Gmail, which mainly supports search at the expense of scrolling, foldering, and sorting may be suboptimal. Even with a threaded client, scrolling was by far the most common access mechanism.

"However, scrolling is not well supported in Gmail, which breaks the mailbox into multiple pages, each of which has to be accessed and viewed separately. Gmail also does not support sorting, although this was a less frequent access behaviour. Finally, folder-access was a preference for a minority of users, accounting for 12% of accesses (compared with 18% that were searches).

"Recent versions of Gmail attempt to combine folders and search. However our data argue for the opposite: users employ either preparatory or opportunistic approaches, suggesting we need to design different features or mailbox views that optimise for each population tendency."

Mortgage Choice secures with CloudLock for Google Apps

Australia's Mortgage Choice is a flagship customer for a new cloud data security application for Google Docs, the CloudLock Vault. "As a financial services organisation, we take the security and safety of our customer and corporate data very seriously," said Neil Rose-Innes, CIO at Mortgage Choice.

"The Google Apps security features are solid, but we needed to extend those services to include document retention so we could ensure compliance with The National Consumer Credit Protection Act of 2009 and other regulations.

"CloudLock Vault is an excellent application for Mortgage Choice because it not only secures our most critical data but gives us the piece of mind needed to leverage Google Apps and its cost and productivity savings."

Now available within CloudLock's flagship solution, CloudLock for Google Apps, the new solution provides a secure, tamper-proof location natively within enterprises' Google Docs domain so critical information is never misused or deleted.

CloudLock's new CloudLock Vault application adds centralised data retention policy management by offering a secure storage area in Google Docs where files cannot be deleted or modified.

Users create or upload files into their CloudLock Deposit Box and CloudLock Vault automatically sweeps them into a special account where they are protected from modification or deletion.

Organisations also have the ability to more easily facilitate business processes and workflows to streamline data retention policies, preserve and retain data for specific projects and departments, collect and retain documents from multiple locations on Google Docs into a single repository. In areas where a repeatable process is necessary, such as vendor bidding, this functionality represents a strategic capability.

"CloudLock Vault is critical component of our offerings," said CloudLock Co-Founder and CEO Gil Zimmermann.

"As enterprises move their data to the cloud, they need to extend the same data retention policies and systems they have on-premise to their data in Google Docs. CloudLock Vault allows organizations to stay ahead of the regulatory curve and ensure critical information is safe from unauthorized use, malicious tampering or accidental deletion."

NAA points the way in the cloud

The National Archives of Australia has published a set of recommendations for government agencies considering outsourcing data storage to external hosts and the cloud.

It says while outsourcing digital data storage can relieve pressure on storage capacity and ICT resources while reducing costs, there are potential risks to the viability, access and use of the records.

The guidelines have been published at http://www.naa.gov.au/records-management/secure-and-store/NAA-storage/outsourcing-digital-data-storage/index.aspx They include a records management risk assessment template that can be used as a starting point to evaluate digital storage options. There is also a General Disposal Authority for Outsourcing that authorises Australian Government agencies to transfer custody of Commonwealth records to contractors and sets out the terms and conditions that apply. The guide highlights important aspects to consider, such as relevant Commonwealth legislation, the maintenance of required metadata and security frameworks..

Aussie startup launches hosted SharePoint DM

Seeing a gap in the Australian market, Nathan Harman and Steve Nelson have teamed up to offer a new hosted, document management solution for the Architecture, Engineering and Construction industries. The new joint venture, AEC Docuflow, will offer the Cadac Organice suite of engineering document management solutions hosted by Harman's company Zettaserve.

AEC Docuflow has signed a partnership agreement to resell the Cadac Organice suite of products with Cadac Organice APAC, distributor of Cadac Organice BV.

Steve Nelson, Sales Director of AEC Docuflow, said: "Having evaluated several Electronic Document Management and SharePoint based solutions, we believe that the Cadac Organice suite offers clients an industry leading feature set. Cadac Organice has over 25 years experience in the engineering document management field, and this plainly shows through in the depth of functionality they have developed.

"The solution integrates with all of the leading CAD systems, providing reference file management and seamless title block integration. Users can view, redline and compare document versions through the integrated viewer without the need for the originating CAD software licenses. It handles time consuming industry specific tasks such as transmittals with ease. In addition, being based on SharePoint allows our company to further build on the solution in areas such as company intranets and client portals."

The solution incorporates industry templates and workflows and a pre-established SharePoint environment. When combined with the hosting service, they offer rapid implementation whilst also reducing upfront establishment costs.

It can be coupled with on-premise scanning or this can also be outsourced to a scanning bureau.

For enquiries contact steve.nelson@aecdocuflow.com.au - Web http://www.aecdocuflow.com.au

Meanwhile, Cadac Organice has just introduced a SharePoint framework for the mining industry. Over the years, it has been implemented worldwide by several mining companies, mining projects and suppliers to the mining industry. Examples are Exxarro, Koniambo Nickel SAS (a joint venture between the government of New Caledonia and Xstrata Nickel and executed by Hatch and Technip), and Sinclair Knight Merz, providing engineering consulting services to the mining industry.

Based on its experience with these companies, Cadac Organice has developed a SharePoint framework to manage all operational documents in mining projects, such as engineering (CAD), quality, regulatory, specifications, and vendor documents, procedures, policies and external communications.

The SharePoint document and content structure, as well as predefined libraries and lists, content and document types, metadata fields and values are aligned with policies and working methods in the mining industry. The framework gives mining companies a head start in using SharePoint and Cadac Organice for the engineering document management and document control needs.

Expand the Value of Microsoft **SharePoint** with **Kofax Enterprise Capture**

With its improved capabilities for document management, records management and workflow, Microsoft SharePoint® 2010 is creating a growing demand for solutions that can automatically capture, transform and deliver documents and data into SharePoint.

Kofax offers the broadest suite of SharePoint enabled capture products on the market, supporting business processes and archives from the enterprise level all the way down to the individual desktop.

Fill the Gaps

Create a complete environment for document based business processes and archives at the enterprise, departmental and desktop level.

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Automatically capture content in any format, from any device or location, and deliver it to a variety of Microsoft applications.

Extract & Classify Data

Extract the appropriate information from varied content sources and deliver it to ERP, CRM and line of business systems.

Automate Processes

Automate the straight-through processing of data and business decisions based on new information as it is received and captured.

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KOFAX

Customers come first for Australian Business 2.0

Using social media for employee engagement is well down the list of priorities for Australian business, according to a new study run by research company Nielsen which found that more than half (54 percent) of businesses use their social media investment for marketing, followed by customer relationship marketing, customer service/support and public relations (30 percent each). The least used activity was employee engagement at 12 percent.

The Nielsen-Community Engine 2011 Social Media Business Benchmarking Study found that business' social media budgets were most commonly allocated to display advertising or maintaining a presence on Facebook (21 percent each). This was followed by social media monitoring (17 percent) and using a corporate blog (15 percent).

It found that businesses are embracing and formalising their social media activities with 17 percent of businesses having a formal social media strategy and 24% have social media guidelines in place.

The research was commissioned by Community Engine and conducted by Nielsen in April 2011 among a sample of 417 respondents, of which 83 were businesses in the private sector employing 100 or more staff.

Community Engine Director of Social Stephen Johnson said, "Attitudes are changing towards social media with more businesses embracing it and becoming more knowledgeable about online platforms. A shift from last year now shows only 35 percent of businesses lack knowledge and expertise to implement social media activities, down from 53 percent in 2009. A significant proportion of businesses want control control of the online platforms with one in five saying they would much prefer to create their own social network than to utilise external social networks."

With Australian businesses the most popular social media activities included:

- Presence in social media networks: 28 percent.
- Tracking/monitoring what is said about your brand/organisation/staff: 26 percent.
- Responding to/acting on comments: 25 percent.

Private companies have more confidence when it comes to a social media strategy and 51 percent of public sector feels their organisation lacks the knowledge and expertise to implement social media activities. But the public sector have come out on top as more active in facilitating discussion and interaction with 56 percent giving the audience the opportunity to ask questions within a social networking platform.

Malaysian firm automates HR with ReadSoft solution

ReadSoft is to deliver an automated solution to a major Malaysian Conglomerate to centralise and optimise its Human Resource processes in a shared service centre environment. The $US650,000 solution will cover the processing of HR service request, and will be integrated into its existing SAP system.

The solution involves the implementation of the ReadSoft Document Capture Suite and its SAP-certified PROCESS DIRECTOR to automate processes such as leave application, recruitment and internal transfer.

By implementing this solution, the HR shared services centre will have gained significant control and visibility into its HR processes. This both strengthens quality control over involved processes as well as efficiency in request handling.

"We are very happy to chosen to be part of this automation project. ReadSoft once again brings a major breakthrough in refining customer's core processes and making them even more efficient in a competitive market", comments Jan Andersson, President and CEO at ReadSoft.

DR survey reveals APac challenge

In a recent survey across the Asia/Pacific markets, analyst firm IDC claims less than one third of organisations interviewed would be able to restore more than 50% of their applications in real-time should a disaster strike. This means most organisations would have less than half of their systems running in the event of a disaster.

"In light of recent catastrophic events in the region, the question we are left with is: With information technology being such a critical part of our day-to-day lives, is this level of availability sufficient, not just for those organisations that responded to our survey, but for the rest of us as well, to sustain normal daily operation?"

"Take the examples of the two major outages that occurred in 2010 across the region. DBS Bank Singapore had their systems offline for 7 hours in July 2010 and Virgin Blue was out for even longer in September 2010.

"Whilst there was clearly an impact to each of these business as a result of these outages, more important was the impact to the thousands of customers that each of these businesses had," said Matt Oostveen, Associate Director, Infrastructure at IDC.

Further analysis of the survey showed that only 11% of respondents would be able to restore any of their systems in real-time. With the respondents drawn from many industries, it is possible that for some of them, their IT systems are needed as critically as others. And obviously there would be some financial impacts to these organisations, even if the systems were offline for a short time, especially if the point-in time is a critical one for these systems to operate.

To counter such issues, many governments across the region have issued some sort of guidelines to ensure these types if outages occur less and less frequently. The Monetary Authority of Singapore, for example, has mandated that 4 hours is the maximum window that IT servers can be offline. Unfortunately for DBS they exceeded this window and were penalised accordingly. IDC suggests governments to do more in these areas where access to IT systems are critical, not just for the organisations who own and manage them, but also considering those customers that are impacted by these systems.

Nuance to acquire Equitrac

Nuance has announced the $US157 million purchase of Equitrac, the provider of intelligent print management and cost recovery software. Equitrac solutions have been adopted by more than 25,000 organisations worldwide.

The acquisition expands Nuance's document imaging portfolio, adding Equitrac's print management products to eCopy ShareScan scanning and workflow solutions, and to Nuance OmniPage, PaperPort and PDF Converter Professional desktop applications.

The addition of Equitrac also strengthens Nuance's global channel partnerships with multifunction printer (MFP) vendors, including Canon, Xerox, Konica Minolta, Ricoh and HP – each of whom currently sell both Equitrac print management and Nuance eCopy scanning solutions through their dealers or as part of their Managed Print Services (MPS) portfolios.

"Equitrac expands our ability to provide our customers and MFP partners with solutions that deliver even higher levels of cost savings and office productivity," said Robert Weideman, senior vice president and general manager of the Nuance Document Imaging Division.

Equitrac's Follow-You printing lets users print documents from their desktop as usual, then use card-swipe or log-in identification at a networked MFP to view and select their documents for on-demand printing.

Acrobat X keeps Parsons Brinkerhoff on the plan

The array of enterprise communication formats available today has expanded, ranging from instant messages to blogs and wikis, as well as more traditional means such as email and internal web pages. But documents, including proposals, requirements, plans, agreements, and reports, remain the primary currency of business, and document collaboration continues to be a core activity of knowledge workers in their day-to-day work.

As a result, knowledge workers are demanding and need more efficient and effective tools for document collaboration and exchange. As IT organisations look to enhance or expand their enterprise collaboration capabilities, they should consider three important trends and their implications:

- Project teams that span multiple third-parties are becoming the norm, and the need to maintain security outside the firewall is increasing.
- The need for dynamic documents that enable more effective and engaging communications is growing.
- Reducing costs via better efficiency remains at the top of the executive agenda.

Global collaborators are distributed—inside and outside the enterprise.

Increasingly, enterprises are made up of teams that are scattered far and wide. Based on a Forrester Consulting study commissioned on behalf of Adobe, "Building the Future of Collaboration," 73% of knowledge workers collaborate with people in different time zones and regions at least monthly.

But these diverse teams aren't just inside the enterprise: 67% of employees report working with people in other companies at least monthly.

"As collaboration grows in importance for knowledge work, the tools must embrace and refine current work habits, while also enabling a transition to more efficient and effective communication and collaboration," Forrester Consulting reports.

Distributed teams are no doubt driving the need for better collaboration tools—especially when it comes to document exchange. Workers frequently collaborate and exchange documents with people outside the company, such as suppliers, partners, agencies, and customers.

For Parsons Brinkerhoff (PB) Australia–Pacific, Acrobat X is providing a way to standardise document output and improving collaborative workflow on the major planning, environment and infrastructure projects it is involved with.

Part of a 14,000-strong global team working in 150 offices across six continents, (PB) Australia–Pacific has standardised on Adobe's new release of Acrobat X professional for its design and drafting teams that generate thousands of critical drawing and project documents each year.

Enterprise Group IT Consultant Rob Pek said the rollout of Acrobat X had helped overcome a major challenge in ensuring individuals working on different versions of AutoCAD design packages on different workstations worked to a common output standard.

"One of our big hurdles has been getting a consistent output throughout the entire team without spending a huge amount of time configuring each PC as it gets rolled out," said Pek.

"We had a lot of problems in the past where schematics were printed out for jobs we are pitching on with missing information. Getting onto a standard platform for everyone has been great."

One of the major new features introduced in Acrobat X is the ability to record and export "Actions", workflow steps in the production of a document. This feature is familiar to users of Adobe's Creative Suite of products, and highly valued as a way to ensure repeatable workflow.

PB AUSTRALIA–PACIFIC HAS STANDARDISED ON ADOBE'S NEW RELEASE OF ACROBAT X PROFESSIONAL FOR ITS DESIGN AND DRAFTING TEAMS THAT GENERATE THOUSANDS OF CRITICAL DRAWING AND PROJECT DOCUMENTS EACH YEAR.

"It's definitely been a great help for us," said Pek.

When CAD documents are created at PB Australia-Pacific, the typical workflow sees them distributed via shared drives on the local network. Corrections are applied to the PDF internally and also through project partners, then the marked up PDF is returned to the CAD designers for final modifications.

One of the key new features in Acrobat X - one that has removed the need to interrupt this workflow when non-design elements need to be changed - is the ability to export data into a rage of different Microsoft Office document formats.

There is a great advantage to being able to take a table that's published in a PDF, export it out into Excel, make modifications there and then publish that back into the PDF.

"In the past we have a lot of financial data included with the design drawings , and once these were published to PDF they were treated as an image. Whenever there was a revision we would have to go back to the original document to make the modification and then publish that page back up again.

"We can now export that table to word or excel and just publish the changes back into the PDF," said Pek.

Finally, the new automated forms capability with Acrobat X is assisting PB Australia-Pacific in the migration of a lot of existing paper-based forms. These are in the process of being converted to electronic Acrobat forms, and Acrobat X now provides the ability to automatically recognise the individual fields as a form is being scanned.

"Character recognition has been improved in the scanning engine as well, there is a huge difference with the early versions. Acrobat X is now capable of recognising a lot more of the text the first time around," said Pek.

RecordPoint 3.0 reigns in SharePoint governance

SharePoint is a platform that many organisations have invested in for its collaboration and team capabilities including content management. Many organisations in Australia and New Zealand are now asking how they can leverage the platform into other areas, particularly robust enterprise document and records management, with a focus on addressing compliance and record keeping challenges they face.

This is especially true in more heavily regulated sectors such as government and financial services but seamless and standards-compliant records management is a crucial element to any organisation's governance strategy.

Traditionally this has been an expensive exercise meaning a large investment in new software and, more importantly, an even greater hidden cost in terms of changes to internal work practices and processes to ensure 'compliance'.

So is the answer to this problem managing your records in SharePoint? The analysts answer is "sort of". While SharePoint 2010 introduced a series of important enhancements to its records management functions, a rigorous approach to information risk requires either investing in customisation of the platform or (and more cost effectively) leveraging a third party product.

Forrester Research has named RecordPoint as one of six technology partners that Microsoft perceives to be important in supplementing the enterprise records management capabilities within SharePoint 2010. RecordPoint was highlighted by Forrester in particular as providing support for Australian, New Zealand and European regulatory requirements.

RecordPoint is the only 100% SharePoint, fully VERS 1-5 certified and ISO15489 compliant Document and Records Management solution available as a commercial off-the-shelf software product for Australian and New Zealand organisations.

Unlike many of the more traditional Records Management products, RecordPoint is focused on allowing end users to manage records without stepping out of their existing business process.. This reduces the training and change management overhead and provides greatly increased productivity.

"People want SharePoint 2010 for the social media capabilities and the knowledge management aspects of the platform. With RecordPoint they can put a rock-solid records management platform in behind that that works seamlessly with the user," said RecordPoint Managing Director, Elon Aizenstros.

The challenge is highlighted in a recent report on governance strategies at Global 1000 companies, conducted by the Compliance Governance and Oversight Council (CGOC), a practitioners' forum focused on data retention, legal hold and discovery practices.

The CGOC found that 75% of legal, records and IT executives surveyed agree on the key components of an effective information governance program. This included systematic linkage and transparency across legal, records and IT, an inventory of current legal holds which are more effectively communicated, and actionable retention schedules that are specific to data sources and data sets. However less than 1/3 of companies surveyed have these elements in place today.

CGOC Founder and President Deidre Paknad, said "Across the board, legal, records and IT leaders agree that rigorous discovery and defensible disposal of data is the key objective of information governance yet just 22% of companies are able to dispose of data routinely today because 'people' glue is too often used to link the people who understand information obligations and its value with the people who manage that information in IT.

With IT costs averaging 3.5% of revenues globally and the ever-escalating rate of data growth, it is imperative that companies break down the silos in legal, IT and records management to enable more efficient compliance and avoid managing data waste in perpetuity."

Governance can only be truly embraced by organisations that meet the challenge of empowering users with a records management platform that works seamlessly with them as they go about their daily business.

DATA IS THE KEY OBJECTIVE OF INFORMATION GOVERNANCE YET JUST 22% OF COMPANIES ARE ABLE TO DISPOSE OF DATA ROUTINELY TODAY ...

Building on top of its vision of a more usable records management platform for end users (as well as for records managers and IT administrators), improving performance and scale of SharePoint as a records management platform was the key focus of the third generation of RecordPoint, which is available for the first time in two separate editions, Enterprise and Standard.

The Standard edition offers an entry level option for business users that still require many of the records management capabilities that SharePoint does not deliver out of the box, but do not require as complex a records classification engine as is necessary for government and more highly regulated industries.

"We want to reduce the barrier for entry for SharePoint users who want to introduce good record-keeping practice into their organisations," said Aizenstros. "So they can take control of the information lifecycle."

Essential to the increased performance and flexibility in managing records with RecordPoint V3.0 is a new search-based user interface (UI).

Technically, RecordPoint have remained focused on leveraging the core capabilities introduced by Microsoft in SharePoint 2010.

"It is central to our strategy that RecordPoint builds upon SharePoint rather than replacing what Microsoft has delivered or simply 'bolting on' a third party connector to another product," said Aizenstros.

"This means that anyone deploying RecordPoint is certain that it will work within their SharePoint environment."

As an example, V3.0 has delivered enhanced storage efficiency by managing the records scalability of the SharePoint 2010 platform, enabling records capacity to scale up to 60x larger than the Microsoft recommended capacity limits.

RecordPoint V3.0 also offers a comprehensive solution for environments with both physical and electronic records, with Physical and Hybrid records management a capability that is not native to SharePoint 2010.

www.recordpoint.com.au

Yammer talks to business

Organisations using the Yammer enterprise social networking platform, such as Australia's NAB, will now be able to integrate Yammer with document management systems and line of business applications including CRM, HR, finance and supply chain solutions.

Yammer has announced a new suite of products including Activity Stream, a new tab on the Yammer website.

This "aggregates stories about coworker actions in their enterprise apps, making it easier than ever before to discover -- and collaborate around -- relevant business data" says the company.

"The Stream is automatically populated with activity stories generated in Yammer, such as when coworkers join groups and follow topics, and activity from other apps can be added via an API. Yammer's Activity Stream includes roll-up logic, which batches related stories into a single item in the feed, reducing noise and enhancing the user experience."

The Yammer Activity Stream API will enable third-party developers to publish activity stories from business applications into the Yammer Activity Stream. Yammer has already announced Activity Stream integration with NetSuite, the cloud-based ERP, making NetSuite data available in Yammer upon customer request.

Yammer has also extended the Open Graph Protocol, which was developed by Facebook, for the enterprise to include extensions for business-specific objects such as employee, customer, office, and document.

Leveraging the Open Graph Protocol enables Yammer to treat any resource on the web, on company intranets, or within enterprise applications as objects within the Yammer Social Graph. This results in efficient linkage of information and roll-up of related feed stories -- reducing noise from feeds.

Meanwhile, Yammer Embed allows Yammer feeds to be embedded inside virtually any business application through the simple use of an embed code (similar to how YouTube videos can be embedded in any webpage).

This enables employees to easily view and participate in relevant Yammer discussions without leaving their business applications. Yammer Embed will be compatible with any HTML or JavaScript-based business system that supports extensibility and will function similarly to Yammer's existing Microsoft SharePoint integration.

"Enterprise social networking has moved beyond early adopters and is becoming part of the fabric of how we work," said David Sacks, CEO of Yammer. "Yammer is adding a social layer to the applications that employees use every day in a way that breaks down silos, fostering productivity, collaboration and improved decision making."

National Trust selects RecFind 6

The RecFind 6 EDRMS from Australia's Knowledgeone has been chosen by the National Trust of Australia (WA) to enhance information management and enable it to comply with the requirements of the State Records Act.

National Trust CEO Tom Perrigno said the new system was a first for the National Trust in Australia and it highlighted the growth of the not-for-profit sector as well as the need to manage this growth to the highest standards.

"This new document and records management system will bring valuable efficiencies to the Trust by streamlining our internal processes and supporting our work with communities and properties across the state," Mr. Perrigno said.

The National Trust of Australia (WA) works to raise knowledge, awareness, understanding and commitment to Western Australia's natural, Aboriginal and historic heritage.

National Trust Project Manager Michael Evans said, "We were very impressed by RecFind 6's ability to implement multiple information management applications and meet the Trust's diverse business requirements within the one integrated system."

The records management Top 8

ARMA International, a not-for-profit records and information association, has published a list of 8 Generally Accepted Recordkeeping Principles (GARP) and suggests they form the basis of ensuring Information Governance processes are up to scratch.

ARMA says organisations should view GARP as a map for a road that is safely winding through an operational and legal minefield that has always existed but has recently become even more treacherous. An organisation with an information governance program that doesn't adhere to the GARP principles is teetering on the edge of the minefield. As it becomes more compliant, it will move away from that edge toward safety. Organisations progressing in that direction will find a lot of value in just taking that first step.

The eight GARP principles are:

Accountability — An organisation shall assign a senior executive who will oversee a recordkeeping program and delegate responsibility to appropriate individuals, adopt policies and procedures to guide personnel, and ensure auditability.

Transparency — The processes and activities of an organisation's recordkeeping program shall be documented in an understandable manner and be available to all personnel and appropriate interested parties.

Integrity — A recordkeeping program shall be constructed so the records and information generated or managed by or for the organisation have a reasonable and suitable guarantee of authenticity and reliability.

Protection — A recordkeeping program shall be constructed to ensure a reasonable level of protection to records and information that are private, confidential, privileged, secret, or essential to business continuity.

Compliance — The recordkeeping program shall be constructed to comply with applicable laws and other binding authorities, as well as the organisation's policies.

Availability — An organisation shall maintain records in a manner that ensures timely, efficient, and accurate retrieval of needed information.

Retention — An organisation shall maintain its records and information for an appropriate time, taking into account legal, regulatory, fiscal, operational, and historical requirements.

Disposition — An organisation shall provide secure and appropriate disposition for records that are no longer required to be maintained by applicable laws and the organisation's policies.

Additional context for each of the GARP principles is available at http://www.arma.org/garp.

UK suffering email management pain: survey

A new survey of 200 CIOs and IT directors within large UK organisations, sponsored by Recommind, has found that more than one third cited email overload as their company's main pain point, whereas only 8 percent of those surveyed considered social media tools, such as Twitter and LinkedIn, to be the utmost concern – a considerable drop from 35 percent in 2010's results. Reccomind says the the research indicates that just 16% of organisations assigned the majority of their budget to addressing email management, despite being the UK's top pain point.

"The disparity between the real issues that CIOs are facing, and the way that budgets are being allocated, is concerning," commented Simon Price, European director at Recommind.

"The buzz surrounding social media and the risks associated with it will no doubt continue to dominate headlines, and it is of course important for organisations to have policies in place to manage and control information that can potentially be spread via Web 2.0 channels, however these results show that social media is only a minor part of the greater information management challenges organisations are faced with on a daily basis."

"It's encouraging to see that so many organisations are reassessing how they mitigate and control information risk," continued Price. "Email has become such a big part of our day-to-day working lives that its impact is often underestimated. If and when firms are faced with an investigation or an eDisclosure request, retrieving the necessary information from email creates a huge amount of work, not to mention business disruption and waste of valuable employee time. When it comes to information governance, it is essential that companies focus the appropriate amount of resources on these big, everyday issues to ensure they don't fall foul of the regulations at a later date. These research findings clearly show that fixing email management is an issue that needs to be promptly readdressed."

UK organisations continue to cite fraud and data breaches as the biggest dangers to corporate information (83 percent), with compliance and regulatory investigations coming in second at 46 percent. In order to address these issues, 43 percent of those surveyed are focusing the majority of their information management budgets on document management and enterprise search systems.

JV tackles enterprise search

Promising to help tame the deluge of corporate data, a new enterprise search platform has been introduced by Q-Sensei, a German-US joint venture.

Q-Sensei aims to give businesses a real-time view of all their data, no matter the source or format. This includes both structured and unstructured data from databases, document servers, SharePoint, CRM or social media feeds like Twitter and Facebook.

"According to Gartner Research, enterprise data will grow by 650 percent until 2015. As a result, it is becoming more and more difficult and time-consuming to quickly find the relevant information that people need in their daily jobs," said Ute Rother, CEO of Q-Sensei.

"Corporate success largely depends on finding the right information quickly and easily then making the best possible decision. With our Enterprise Search Platform, businesses can address this challenge by contextually exploring the wealth of available information and by showing them relations between items across data pools and data formats."

Electronics giant captures with CVISION

CVISION Technologies is to provide a global electronics corporation with a scanning solution based on its PdfCompressor software to OCR a million pages in backlog as well as 5000 pages per month moving forward. The corporation is a major contender in the electronics component industry and has distribution all around the world. Recently the corporation acquired three other companies, leading to a marked increase in the amount of document processing work that needed to be done.

The corporation had a backlog of several hundred thousand pages that required processing. In order to facilitate this task, the corporation turned to CVISION for a software solution that could perform both file compression and OCR. Using CVISION's PdfCompressor with OCR, the corporation was able to convert their image documents into highly efficient, compressed files with search capability. With compressed files, the company was able to significantly reduce their backlog and free up storage space. Employees also had an easier time accessing the documents because of their decreased size. Also, because of OCR the documents were all searchable, allowing for faster and easier access to information.

Chris Koulouris, Marketing Director at CVISION Technologies, stated, "Many companies have a keen interest in using document capture software to improve the efficiency of scanned paper. Our advanced software continues to help companies move one step closer to a paperless office."

Cumulus adds metadata smarts

Canto has announced the release of Cumulus 8.5, a major upgrade to the company's digital asset management product line, adding native support for metadata in more than 20 languages, and automated workflow improvements.

Users can now see and search for metadata in their native language, and options are available for translators and others who need to work with multiple languages. In addition to metadata values, virtually all aspects of Cumulus can be localised, including category, layout and template names, and help messages.

Cumulus Sites, the company's Web-based file sharing interface, now enables users to upload files to Cumulus, and edit metadata. All user permissions are global in Cumulus, so no additional work is required for the management of Web users.

Offering a new option for file distribution, Cumulus can create PDF contact sheets that include direct download links behind each thumbnail. Downloads can be originals, or variants processed on-demand using watermarks and other options. All file types are supported.

"This is great for organisations that distribute catalogues, portfolios or documentation," said Canto marketing director, David Diamond. "Users click a thumbnail and the download starts. Cumulus version control helps ensure that files downloaded this way are always up to date."

"Workflow automation options have been added to drive advanced production chains, such as creating asset variants, copying files to remote locations for backup or publishing, applying metadata templates and changing permissions," Canto CTO, Thomas Schleu explains.

"Based on events like new records or metadata edits, Cumulus 8.5 can perform on-the-fly image processing, update metadata or production statuses - even change visibility and access permissions," he said.

Metadata edits can be validated against rules that ensure email addresses and other structured values are properly formatted before a record is saved. Cumulus administrators have control over account settings, which helps standardise installations, and reduces confusion for users.

Administration duties can also be assigned to "deputy" administrators, enabling organisations' departments to manage their own users.

Improvements made to the Cumulus Vault, the product's version-control engine, virtually eliminate any performance difference between Vault file transfers and standard network transfers. A new OS-based central asset storage option makes direct Cumulus access from within InDesign and other production applications easier.

Also, 64-bit support is now available for the Cumulus Server for Windows, Mac OS (Intel) and Linux; the Cumulus Java Classes; the Cumulus Scheduler; Cumulus Sites and the Cumulus Web client.

DataBasics, regional distributor of the Canto Cumulus digital asset management system, has announced that although Canto has raised the entry level and Software Maintenance prices worldwide for the Cumulus 8.5 product based upon expanded features and services, DataBasics will maintain the current prices - and take them lower where possible.

Despite world price increases for Cumulus 8.5, the favourable exchange rate between the Euro and Australian dollar has allowed DataBasics to absorb the price rise and even decrease some entry level costs.

Ricky Patten director of DataBasics, said, "The Cumulus business the last few years in the region has exceeded $A1 million per year and we want to break right through that figure and set new records. We're not going to let Canto spoil the party so we're going to absorb the price rises and let the Australian and regional community continue to purchase Cumulus at the existing price point."

Cumulus 8.5 is available at no additional charge to customers on active service agreements.

A single user edition is $A594 inc. GST, while Cumulus Workgroup Entry 8.5 is $6875 and the high end Workgroup "business server" is $16,775.

www.databasics.com.au

Waving a WAND over SharePoint taxonomy

DataFacet is a new product from WAND, Inc, that enhances the managed metadata capabilities of SharePoint 2010 with advanced automatic tagging capabilities and prebuilt term sets.

DataFacet for SharePoint 2010 combines an available library of hundreds of pre-built taxonomies with a software add-on that extends the managed metadata feature in SharePoint 2010 to allow companies to deploy an enterprise taxonomy and document tagging in a SharePoint 2010 environment.

SharePoint 2010's new managed metadata feature enables taxonomies to be loaded into SharePoint for the first time.

The DataFacet auto-tagging engine analyses the text of documents at check-in time and matches the taxonomy elements that are found in the document.

The matching elements are added to enterprise keywords columns of the document and subsequently are used for search and faceted navigation of document result sets.

Rules can be created and modified in the taxonomy manager interface as well as previewed before they are applied to the complete corpus.

The foundation taxonomies can be customized with terminology that is specific to the enterprise. Taxonomy terms can be added, deleted and rearranged.

DataFacet also integrates with FAST Search for SharePoint, with automatic document tagging promised to enhance the parametric capabilities of FAST to provide quicker, more accurate search results.

Microsoft Senior Product Manager Ryan Duguid commented that "advanced taxonomy management and auto-classification of enterprise documents are both logical extensions and enhancements of the new features of SharePoint 2010. The DataFacet solution from WAND can rapidly reduce the burden of tagging from end users, increasing information value and making it easier to find and leverage content in SharePoint 2010.

"DataFacet is also a great solution for SharePoint 2007 customer looking to migrate to SharePoint 2010 and take advantage of the great new taxonomy capabilities by automatically tagging existing content across the enterprise."

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Enterprise 2.0

Image & Data Manager looks how Australia and NZ organisations are realising the vision of Knowledge Management through leveraging valuable data and employing new platforms to introduce business process automation and to improve communications and collaboration.

There are many planks to the modern KM platform: from SharePoint Wikis and Workspaces to managed document repositories and better enterprise search.

Knowledge is indeed power, and many organisations are discovering how successful KM is improving sharing, workflow, records management, compliance and information availability.

The end goal an organisation's KM strategies can vary greatly, whether it is to retain IP, provide legal protection, aid compliance or something else entirely.

Large organisations such as the Australian Taxation Office have a range of KM initiatives underway, including Intranet, SharePoint, Social Media discussion group, repositories of common terms and definitions, eWiki pages, and communities of practice (e.g. marketing, business analytics, design etc.).

The end goal of KM at the ATO is enhanced speed to market, to re-use work already delivered, rather than re-invent output with each new task or assignment or product.

CBH Group

The CBH Group is one of Australia's leading grain businesses with net assets of around $A1 billion.

It is embarking upon an integrated ICT - IM - KM strategy,

with the intention of utilising existing platforms, i.e. Line of business (LOB) applications, SharePoint and eDocs (5.3). It is also developing a "OneCBH" platform to provide a user interface.

As a greenfield site just commencing the KM journey, CBH Group is anticipating that as a starting point KM will focus on building collaborative platforms - upon which to promote knowledge sharing. The proposed road map will include data harmonisation and Information Governance.

One of Victoria's largest government departments sees the end goal of KM as "To improve the way we work; to connect people and ideas regardless of location, position or organisational structure; to make tacit knowledge more visible and to pinpoint its sources; to fully explore and appreciate our human capital."

For Kerry Gutowski, Knowledge manager at CPA Australia, "The end goal is to make information available to members Anywhere and Anytime and to effectively re-use content and deploy it through multiple channels."

"I think it is important to make the changes incrementally rather than a "big bang" approach. Look for the low hanging fruit or the project where the impact can be seen quite quickly. Find a business unit that is suffering through poor KM approaches and get them to buy-in to the KM strategy and have them become "champions"

"WITH THE PLETHORA OF DATA AND INFORMATION AND THE AVAILABILITY OF TECHNOLOGY KM IS NOW NOT A LUXURY BUT A NECESSITY AND THE DUTY OF CARE OF THE ORGANISATION TO IDENTIFY, CAPTURE, HARNESS AND DISSEMINATE KNOWLEDGE AND INFORMATION IN A TIMELY FASHION." - PEOPLE TELECOM

Kordia

At NZ telco Kordia, the main goal of KM is to provide compliance with the national records management act as well as enhancing the storing and sharing of knowledge from employees to the rest of the company.

Janet Chambers has worked as a Business Analyst for NZ telco Kordia since 2006. Kordia has over 700 staff in over 20 locations across Australia and New Zealand. Janet's original focus was on the financial systems but in early 2010 she took on the challenge of assisting the Corporate Knowledge Manager with the implementation of SharePoint throughout the business, and the upgrade to SP2010.

With SharePoint as its Intranet and document management platform, Kordia staff are using wiki pages for knowledge sharing.

"One major focus is to make sure all staff are aware of the policies and procedures. Another is the version control on quote and tender documents, so that there is no confusion around which is the latest version."

"Social media has been a bit slow to take off inside our organisation, but people are slowly starting to use Twitter and wikis."

"They are starting to use Team sites and Mysites inside SharePoint. We are decentralising the control of team sites so teams have more input around the content of their own sites.

"You have to make entering and finding data as quick and easy as possible. Busy people get frustrated quickly if they have to spend what they consider 'too much' time saving data or searching for data."

VMIA

Katherine Brooks is records co-ordinator at The Victorian Managed Insurance Authority (VMIA) which provides risk and insurance services for Victorian government bodies. It is a statutory authority which reports to the Victorian Department of Treasury and Finance.

Brooks agrees that KM would improve the ability to share lessons learned, & reduce "reinvention of the wheel".

"Data reuse would be better - particularly if the user was sure that the data was current."

The VMIA is currently exploring the implementation of an EDRMS for RM & DM, and has no initiatives in social media. It is currently using TRIM for paper-based records.

"The implementation of an EDRMS is in the planning stage, as part of a drive for compliance. The KM strategy is in early stages of development. The organisation isn't clear on what they want/expect from KM initiatives. They believe better KM would be good for them, but they're not clear on what better KM might look like, and are wary of how resource hungry it might be."

With a staff of just over 100, KM is seen as a means to improve internal information management and compliance

"The challenge is choosing which of the plethora of KM products is best suited to the organisation's needs - choosing one of everything could become a maintenance nightmare.

"There's so much relevant information inside and outside the organisation. Harvesting it in a meaningful way would improve productivity immeasurably and hopefully that would translate to more satisfied staff, thereby improving staff retention."

One of the major KM challenges is providing new staff access to the lessons learned by their predecessor. In many cases that information will be filed away on a network drive in a folder named by their predecessor, with an unknown directory structure.

"So you may have to know your predecessor's name and know where to look on the network. That's if it goes on a network drive, in many cases it will be placed on a local drive or a personal drive. So there is a fair amount of memory loss there."

"A lot of organisations are sticking their heads in the sand about social media because it does require a lot of thought and a lot of consideration to figure out how to manage it. The easy response is to say We Just Don't Do it to avoid the problem."

CPA Australia

Kerry Gutowski, Knowledge manager at CPA Australia, thinks it is important to make the changes incrementally rather than a "big bang" approach.

"Look for the low hanging fruit or the project where the impact

"IT IS A CRITICAL ASPECT OF ANY BUSINESS AND IS VERY CHALLENGING TO MANAGE AND PROVIDE SUCCESSFULLY. COMMON TOOLS SUCH AS SHAREPOINT ARE OFTEN TOO COMPLICATED AND REQUIRE FREQUENT MAINTENANCE AND UPDATES." - SALMAT

"THE TRIUMVIRATE OF PEOPLE, CULTURE/ CONTENT AND TECHNOLOGY NEED TO BE CONSTANTLY KEPT IN BALANCE IN A SIMILAR WAY TO THE TRIUMVIRATE OF POWER." VICTORIAN DEPARTMENT OF BUSINESS INNOVATION.

Seek and ye shall find

How do you find the right person to ask a difficult question in your organisation. Where do you start to look.

Its not surprising really that the search usually begins with the colleague sitting closest, and this approach can still work when your organisation is small enough to enable shared knowledge of internal expertise to be easily known.

But when your colleagues number in the thousands and are spread across dozens of locations, what is there to do?

The Australian Taxation Office (ATO) uses an enterprise-wide staff directory, but it's still primarily word-of-mouth (or who your desk colleague knows).

At NAB, a register has been created using SharePoint where each person in the company can fill out a profile including expertise and experience.

This information is searchable. Although completing this information is "optional" it is being strongly encouraged.

The full C/Vs of all technical and professional staff are retained within the Documentum central repository at Westpac.

Curriculum Council WA is thinking about deploying the My Site capabilities in SharePoint

"That would allow us to share staff expertise - the blockage we have is that there is a perception that staff will 'enhance' their expertise/skills offering services they can't provide," said Information Services Manager Murray Jackson.

At CPA Australia, currently people find staff by asking others who have been in the organisation for some time or posing a particular question on Yammer.

"A tool to map internal expertise is a project I would like to implement - the framework is there on the intranet - what is required is management endorsement, said Knowledge Manager Kerry Gutowski

A Directory for staff at Victoria's department of business Innovation is organised by business unit and there is a capability to place details in staff directory re experience but this is rarely used.

can be seen quite quickly. Find a business unit that is suffering through poor KM approaches and get them to buy-in to the KM strategy and have them become "champions"

CPA Australia is underway with an Intranet upgrade and looking into a potential SharePoint deployment for document management, as well as federated search with internal and 3rd party repositories.

"By having a KM strategy it makes the storage, use and re-use of content more consistent and makes better leverage of information already created," said Gutowski.

FESA

SharePoint 2010 has been implemented as an Intranet and Extranets platform at The Fire and Emergency Services Authority of Western Australia (FESA), with TRIM for document and records management.

FESA is implementing a corporate map viewer and knowledge kiosk. Knowledge manager Elizabeth Hides says KM highlights what knowledge is available in the organisation, and provides more complete information to assist their decision making or at least increase their awareness of knowledge that may be of use to them.

"Members of the community are using and are becoming more reliant on social media. The challenge will be to balance the needs of the community with the constraints of the agency to provide accurate, timely information," said Hides.

Department of Business and Innovation (DBI)

Victoria's Department of Business and Innovation (DBI) is using the TRIM EDRMS for document management with an intranet running IBM WebSphere linked with Easylink tool. Enterprise search is handled with Autonomy and Business Intelligence with Business Objects. SharePoint is used for CRM.

"There are Knowledge growth sessions about the activities in the Department plus external motivational speakers to get folk thinking about KM, said Vicky Harris, Manager, Knowledge Management.

"We also have Communities of Practice with Divisional Information Owners being a main one and Power Users another one in DBI."

"KM IS STILL SEEN AS AN ANNOYING 'OVERHEAD' BY SOME STAFF, BUT WE'RE GETTING THERE." - DEFENCE DEPARTMENT

With operations in each state, KM enables sharing and efficient roll out of best practice operating techniques.

Curriculum Council WA

The Curriculum Council is an independent statutory authority in WA with around 100 staff. Information Services Manager Murray Jackson has rolled out a SharePoint intranet to allow better sharing and access to information, while staff must file corporate email and documents in TRIM.

"SharePoint is helping us work across the organisation rather than the silos we used to have," said Jackson.

"We are looking to explore more of the collaboration capabilities of SharePoint while rolling out to more business units in 2011."

Business process mapping occurs in Microsoft Visio and project, although it is a challenge getting business areas to keep their business process maps current. The Curriculum Council is also looking at a Knowledge Retention Solution from iOctane, there are no plans to dip their toes in social media.

"We have a couple of FaceBook sites - just pushing information out - but the organisation's management team is not really convinced that we can control this media. We are not into sales so we have not figured out how social networking fits into a government service yet."

The jury is still out on whether social media is a crucial element to a KM strategy. Many large organisations such as major banks and the defence department have a simple way to eliminate the risk, they ban all use of external social media on their networks.

Others are looking to alternatives to twitter such as Yammer, which has been introduced at NAB and has experienced a strong take up. It was done more as an experiment however is now a fully supported and endorsed communication mechanism.

The social enterprise

In this extract from his book, Managing Content in the Cloud, OpenText Executive Chairman and Chief Strategy Officer, Tom Jenkins, examines the burgeoning use of social media in the enterprise.

The Internet has experienced a paradigm shift with the introduction of new interactive Web 2.0 technologies and communication models. Web sites have transformed from static pages to dynamic sites, online communities and social networks supporting a rich culture of user participation and contribution.

Social media refers to the dissemination of content and media through a social network. Social media is content (often called user generated content or UGC) that can be shared easily with the use of Web 2.0 technologies. While social media is about the content and information; Web 2.0 is a term that describes the technology as an enabler.

There are numerous technical and sociological changes that are supporting the wide- spread use of social computing. More powerful technology, faster connection times and lower costs are bringing more people online. Along with improvements in accessibility, demographics are playing their part in introducing social collaboration to the enterprise. As boomers retire, organisations are rethinking their models of knowledge transfer. Gen-Xers are adopting social computing tools to find the knowledge and exposure they need to do their jobs effectively. Their successors, Millennials, as "digital natives" will expect to use the same social collaboration tools in the office that they use at home.

From a business perspective, organisations are just starting to incorporate the principles of UGC into their Web strategies to create new business models for driving revenue. Social media is being regarded as an area of potential investment as businesses progressively regard social networks, online communities and the Web as effective channels of communications.

ECM 2.0 Creates the Social Workplace

Within an enterprise context, social collaboration creates a knowledge sharing culture, enriching intellectual capital in the process. The "social workplace" connects people with their peers, critical content and information. Culturally, it breaks down hierarchical and administrative barriers to innovation and idea exchange among employees. Technologically, the social workplace combines ECM technologies with social collaboration to bridge geographical, organisational and generational gaps. ECM 2.0 refers to managing content from Web 2.0 social networks, blogs, wikis and other Web 2.0 technologies.

Unlike an intranet, which is typically organised according to function or role, the social workplace facilitates knowledge exchange from the bottom up according to areas of expertise or by project. The social workplace fosters the natural formation of communities around topics of interest. These communities are built on corporate networks that disseminate knowledge to all employees. Within these communities, tools like forums, wikis, and blogs are used in a variety of ways to provide employees with a platform for exchanging and managing the information used to accomplish everyday tasks.

Enterprise social networks facilitate connections based on self-generated user profiles. Typical social networks are profile-driven. Profiles deliver access to personal and professional information, pictures, relevant links, blog sites and more. Within an organization, the member directory is a dynamic version of the employee directory, where employees can connect with others based on skills, expertise or interest.

With ECM 2.0, value is added to content that is tagged, rated and commented on in context. Social bookmarks can be used in the workplace to generate a common set of links that members of a project team might share around topics of interest. Models of collaborative tagging are currently being adopted by large organisations because they prescribe new and innovative ways to relate knowledge and can reveal emerging knowledge structures.

IN LARGE ORGANISATIONS, SOCIAL MEDIA IS GENERALLY NOT PART OF A COMPANY-WIDE STRATEGIC EFFORT. INSTEAD, EFFORTS ARE FOCUSED AROUND TACTICAL, DEPARTMENTAL AND INITIATIVE-BASED DEPLOYMENTS.

The ability to assemble and personalise Web presentations of people and information with- in changing contexts is a distinguishing feature of Web 2.0. Mashups combine multiple, disparate data sources into new and unique applications, services or dashboards. Mash- ups are fast and easy to deploy, use open Application Programming Interfaces (APIs) and enable non-technical users to produce customised Internet applications. Mashups can be used to connect to critical data sources within the enterprise. Accounts payable clerks can access relevant information to resolve payment process exceptions via a familiar Outlook-style user interface, from a number of different sources.

In large organisations, social media is generally not part of a company-wide strategic effort. Instead, efforts are focused around tactical, departmental and initiative-based deployments. Examples include a product manager launching a social micro-site to support a new product, a brand manager creating a social site for a specific promotion, or technical support using a wiki for documentation. In many cases, marketing departments have been leading social media deployments within the enterprise.

But how can the enterprise expect to benefit from creating a social workplace? The McKinsey consultancy firm has conducted three annual surveys to answer this question. In the most recent, participants revealed that they had better access to knowledge and expertise, experienced higher levels of satisfaction and were able to innovate at higher rates. Innovations that result from social software are probably the most tangible return on investment for the social workplace. In this study, in fact, innovation rates rose by as much as 20 percent and knowledge workers experienced a 35 percent increase in access to expertise – all through using social computing tools.

Companies will have different objectives for using social media depending on the positioning of their products and services, and the industries they sell to. Without an enterprise strategy for the management, integration and secure support of social computing technologies, many social media sites are being used by departments without the proper over- arching governance, brand consistency, user experience integration or content strategy in place. As these sites become more visible and increase their requirements for resources and integration, IT departments will be increasingly asked to participate in strategic discussions around social computing solutions.

ECM – A Context for Risk Management

Social media is often linked to the risk of exposing protected data, such as the intellectual property found in a corporate intranet. Transparency is required as both litigators and regulators seek to expose employee communications and decisions, and social media based communications are no exception.

Web 2.0 tools generate a myriad of risks for the enterprise. End users are responsible for generating social media content and managers may not be able to fully control the content. IT departments may not be suitably organised to manage social media technologies securely. Social media can conceal security risks posed by the unmonitored use of content by third party applications. Using tools available outside of the firewall puts corporate information at risk.

Enterprise content management practices can reduce exposure to the security risks emerging from flaws in Web 2.0 technology infrastructures. With the proper benchmarks in place, social media benefits companies by improving communication to support business processes, increasing visibility and speed of content through a broad author base and in- creased productivity by connecting people to relevant content and expertise.

To determine if content is at risk, an organisation needs to determine how its Web 2.0 content is stored, how the content is managed and whether management and storage methods comply with relevant external regulations and internal governance policies. Social media shares many of the same issues around regulatory compliance with email because it involves a similar sharing of unstructured content.

Through the effective use of ECM, it is possible to create similar governance, risk management and compliance processes for Web 2.0 content and collaboration.

The natural tendency of Web 2.0 applications to operate outside of business departments, cutting across traditional organisational boundaries, creates an interesting challenge for governance and risk management. Because Web 2.0 operates outside of conventional constraints, developing, monitoring and managing content control policies becomes more complicated.

The growing social media risk management problem needs to be addressed fundamentally from the ground up. Part of the core approach is to recognise that not all content is created equally. Different kinds of applied content needs to be retained for different periods of time; the challenge lies in identifying the important content, separating important information from the unimportant and determining an appropriate retention period.

WITHOUT AN ENTERPRISE STRATEGY FOR THE MANAGEMENT, INTEGRATION AND SECURE SUPPORT OF SOCIAL COMPUTING TECHNOLOGIES, MANY SOCIAL MEDIA SITES ARE BEING USED BY DEPARTMENTS WITHOUT THE PROPER OVER- ARCHING GOVERNANCE, BRAND CONSISTENCY, USER EXPERIENCE INTEGRATION OR CONTENT STRATEGY IN PLACE.

The "content life- cycle" concept – what happens to content after it has been processed – introduces another important aspect of social media content management.

For many organisations, it is important to control the complete lifecycle of corporate content. The definition of content lifecycle – from creation through to archive and final disposition – should be a shared view between an organisation and its regulators. Once this view is established, content needs to be integrated into an organisation's current ECM system of storage and archive repositories, while at the same time made available for regulatory compliance, records disposition plans and access by various business users.

Managing Content in the Clud is available as a free ipad appplication at http://itunes.apple.com/au/app/cloud-app/id427602579?mt=8

Safeguarding use of social media in the enterprise

While organisations are keen to flex their social media muscles beyond the traditional applications of marketing and communications, the risks of providing staff access to Web 2.0 in the workplace are holding many back. CEO John Fison outlines how Australia's Netbox Blue is seeking to safeguard the new platforms whether on or off the company network.

There is no doubt 2011 promises to be an interesting year for uptake of corporate social media. Whilst marketing and communications retain their dominance as the main reason companies use social, media, there are new priorities emerging in customer service, employee engagement and product development.

Web 2.0 monitoring has leapt to front of mind for many information professionals in 2011 with the move by the Victorian Government to legislate against workplace "cyber-bullying."

Workplace bullying is also covered under the Occupational Health & Safety (OH&S) act and the responsibility to provide a safe workplace is still with the employer. Company directors may be held liable personally if bullying is found to have occurred and they have turned a blind eye.

Companies that embrace and allow social media must also be aware that they can be found liable for something posted by an employee, even when they've done it at home.

To deal with this issue, Australia's Netbox Blue has developed a platform called SafeChat. This evolved from the anti-cyber bullying features of the Netbox education solution, an appliance originally developed for schools around Australia that provides keyword scanning on internal and external email, as well as a host of other features. Netbox solutions include a range of security and internet and email filtering and management features in one appliance.

The SafeChat platform is designed to identify the most common forms of social media communication and moderate these in real-time according to organisational policies. The technology is incredibly flexible and can provide separate policies for different groups – for example allowing more open access for marketing as opposed to a finance department.

In addition rules can be set to allow staff to access their Facebook site, or other social media applications, at agreed times of the day – lunchtimes as an example. Many firms also use the technology to apply corporate disclaimers to social media messages – in the same way as most companies do with company email to avoid liability and confidentiality issues arising. We have developed a concept called the Borderless Internet Compliance (BIC) framework, to allow organisations to implement social media policies on devices wherever they are located.

The system works in two ways. Firstly – all traffic on the organisation's network is filtered through the gateway Netbox appliance and the common social media applications are managed and moderated in real-time – preventing any inappropriate communications from being posted – for example on Facebook or Twitter, on any device using the corporate network. This applies to PCs, iPhones, other Smartphones and tablet devices.

> ACCEPTABLE USE POLICIES NEED TO GOVERN THE EMPLOYEES' COMMUNICATIONS, NO MATTER WHERE OR WHEN THEY MAKE THEM

Secondly, as many workers now use mobile devices, such as laptops or Macbooks outside the network (on WiFi, 3G or home networks) a local agent can be deployed on the device to provide the same level of controls over social media use with full alerting back to designated managers or administrators. Policies can be flexibly updated and for the mobile workers these new policies are pushed out to the device by the centralised management system.

So whether you are plugged into the company network, or using a company device on an external network, SafeChat is able to undertake real-time management and moderation of the most popular social media channels, allowing companies to control the language, to block bullying and other anti-social or reputation damaging communications.

Web 2.0 security checklist

It is important to review your current technology infrastructure to ensure that it works with Web 2.0 technology as many traditional IT security and control technologies simply do not address the risks associated with accessing content in real time via social networking sites.

Network firewalls provide little protection as Web 2.0 relies primarily on standard HTTP and HTTPS protocols that simply can't be blocked without cutting off Web access. Applications such as gaming, instant messaging or Peer to Peer services can be launched from a USB device and are applications as opposed to websites. These need controlling at the application level as opposed to by traditional and often outdated web filtering technologies.

- Ensure that current security and filtering technology can inspect HTTPS sites as most sites now have secure versions of their websites that staff can access without detection.
- Traditional anti-virus is limited to inspecting file transfers and many of the greatest "drive-by" threats encountered today are contained in browser scripts that are invisible to anti-malware filters.
- Web reputation services alone are ineffective as some of the most valuable sites on the Web, such as Google or Yahoo, have fallen victim to hosting malicious code, and simply blocking access to these sites is not an acceptable answer for most businesses.
- Simple URL filtering that blocks objectionable or time-wasting content based on the home page address of the Web site no longer works when sites now commonly aggregate information from multiple sources.

Most companies now are realising that the workplace is borderless and, with mobile workers and staff accessing email and other work-based applications away from the office, that their Acceptable Use Policies need to govern the employees' communications, no matter where or when they make them.

With the risks of bullying, data leakage, discrimination and reputational damage rising by the day, staff have to understand that what they post on Facebook at a weekend about their boss, their employer or their products may well have legal repercussions.

Social networking, instant messaging and other Web 2.0 type communications are now an integral part of education and business. Yet they have also become the 'virtual toilet wall' of the modern world – a place for anyone to get their grievances off their chest, bully other students, teachers and to criticise colleagues. SafeChat enables administrators to control the language used on popular sites to dramatically reduce bullying and other anti-social communications.

ONE OF QUEENSLAND'S LARGEST INDEPENDENT SCHOOLS, JOHN PAUL COLLEGE, IS ONE OF THE FIRST TO MAKE USE OF THE NEW TECHNOLOGY.

SafeChat also enables administrators to prevent people posting negative comments about their school or business. In this way, SafeChat can help avoid reputational damage.

SafeChat scans the traffic stream on popular Web 2.0 applications against a highly customisable list of dictionaries to determine what action may need to be taken. Communications can be blocked and an administrator, business manager or principal can be alerted about any policy breach.

One of Queensland's largest independent schools, John Paul College, is one of the first to make use of the new technology. SafeChat is deployed on the school network and on the school's 2000 laptop computers. If a student uses inappropriate language in an email or on a Facebook account, SafeChat detects it, blocks the offending words and alerts the school the instant it occurs.

Kathryn Priol, Director of ICT at John Paul College says Netbox Blue's technology enables the school to protect students in a way that simply was not possible before.

"The chances of a cyber bullying incident occurring are now greatly reduced, which is reassuring for students, staff and parents," Ms Priol says.

Companies themselves share some of the responsibility as many employees are often unaware of the consequences of posting to social media sites. Despite the fact that 54% of companies use social media sites such as Twitter, Facebook and LinkedIn, 75% of employers reported that their business did not have a formal policy regarding the on-the-job use of social networking sites, while 20% reported that they did according to the 2010 report Employer Perspectives on Social Media.

There are many other areas of genuine concern, not the least being the potential for productivity loss from staff wasting time on Facebook instead of doing their job.

It is understandable that the natural inclination, given the risk level, would be to block access to social media sites. In fact, it is estimated that more than 60% believe this is the way to go.

However, it is not a matter of simply opening the floodgates to give employees uncontrolled and unfettered access to social media sites.

The sensible approach for businesses is to identify and understand the risks, and to develop a social media strategy that includes a Legal and HR framework. For instance businesses should review all employment contracts and include terms obliging employees not to disparage their employer, both during and after employment ceases.

You will need a social networking policy that explicitly lays out what is and isn't permissible, both on the company's network and outside of it if they're presenting themselves as representatives of the company. However, 75% of companies have no formal social media policy or guidelines.

Media monitoring should be set up with Google Alerts and other tools or services to provide real-time monitoring of blogs, forums, Twitter and other social networking sites. This will enable you to respond to positive and negative comments quickly and decisively as well as to take any legal action required.

In order to take advantage of social networking, companies of all sizes need to create policies and guidelines to regulate social media usage at work and to educate its employees about defamation, sexual harassment and copyright infringement. They also need to explain the penalties for uploading offensive comments, downloading inappropriate content or using social networks as a vehicle for bullying, discriminating or intimidating others.

Companies need to audit their technology solution to ensure that it addresses the new threats that Web 2.0 technology poses.

Employees are no longer tied to the office and the desktop computer - they are mobile; the office is anywhere there is a 3G or Wi-Fi connection; they connect to the Internet and download content to mobile phones, laptops and iPads; they communicate using email, instant messaging, text and any number of social media applications.

It is therefore important that your technology solution should extend the ability to monitor and control any device on or off the network for any company-owned Windows and Mac OS devices.

New and innovative technologies will go a long way to reducing the risks and concerns many businesses have with social media.

These new technologies need to protect businesses from growing cyber criminal attacks, malware, identify theft, intentional and unintentional data leakage.

They should also provide detailed reporting and alerting capability. Users should be able to access reports via a web browser or have them emailed to them automatically. You should also be able to set up real-time alerts to inform administrators or managers when rules or policies have been breached.

John Fison is Chairman of Netbox Blue and is responsible for the strategic development of Netbox Blue in Australia and overseas.

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AP automation adds up for Bavarian Hospitality

Devoted customers of the Bavarian Bier Café know there's no better place to enjoy pure imported German beers with hearty fare like pork belly, chicken schnitzel and apple strudel. Keeping the larder stocked and the taps flowing is the responsibility of the Bavarian Hospitality Group (BHG), which has solved the problems of rapid business growth with a new invoice automation solution from Australia's Efficiency Leaders.

Started by German-born restaurateur John Szangolies over 35 years ago, BHG now owns and runs a growing network of 16 restaurants across NSW and Queensland. BHG's first restaurant, the Löwenbräu Keller in the Rocks, is a Sydney institution. In recent years the BHG brand has grown to include The Argyle, Sake Restaurant & Bar, The Cut Bar & Grill, and the Bavarian Bier Café.

In the past 12 months BHG has experienced rapid growth, adding five new venues, including the first interstate locations in Queensland. Even before the rapid expansion, manual processing of supplier invoices was growing increasingly unwieldy.

Lisa Margison, Financial Controller for the Bavarian Hospitality Group, said the BHG head office dealt with between 3500 - 4000 invoices a month. Without any EDI links with key suppliers, over 90% of these invoices arrive on paper and must be manually entered.

"There was lack of control over the processing of invoices," said Margison. "Additionally all of the purchase orders (POs) were created manually and it meant we had a lack of visibility."

The manual workflow that had evolved over time has also introduced multiple layers of duplication which added the potential for human error to introduce inaccuracies. Previously, invoices were handled a minimum of three times after being sent into head office.

"Each invoice was sent to the executive chef, who had them compiled into an Excel spreadsheet. Then all food and liquor invoices were entered manually into BHG's inventory system, which was Micros at that point in time, after which they would come to the finance department and be entered into the accounting software," explained Margison. "Being handled so many times and manually entered into two different systems saw many opportunities for human error."

THE RAPID ROLLOUT OF NEW STORES PUT ON INCREASED PRESSURE TO IMPLEMENT AN INVOICE AUTOMATION SOLUTION.

IT Manager Mohammed Dean had been assessing alternatives for invoice automation since 2009, but the rapid rollout of new stores in 2010 put on increased pressure to implement a solution.

"I had to make sure that the application mapped our needs," said Dean. "I had a look at a number of proposals but they wouldn't map to the Micros POS system or couldn't talk to our Greentree financials. The Efficiency Leaders Automation Platform (ELAP) has delivered the integration that we required."

"There is better integration between business units, inventory people are talking to financials, who are in turn talking to the venues. There is better interaction between every business unit. Data is accurate so people are more confident in talking to one another."

In addition to adopting ELAP, BHG migrated from the Micros point of sale (POS) platform to an alternative from H&L. Efficiency Leaders provided the turnkey automation solution in 12 weeks.

The entire solution went live at the end of March and is now interfaced with a new SharePoint Foundation installation, to provide automatic archiving of invoice images and extracted data.

(Continued over)

Suppliers stall e-invoicing: survey

A global survey of 1,373 finance professionals by Basware has found e-invoicing adoption is being hampered by barriers to transact electronically such as suppliers being forced to use multiple portals.

The survey of US, Europe and Australia found 97% of businesses believe in the efficiency of e-invoicing but adoption levels still remain low. While the benefits of transacting invoices and purchase orders electronically are widely recognised, the majority of businesses surveyed (56%) are currently receiving less than 20% of all invoices electronically on a monthly basis and only 9% of respondents stated having high levels of e-invoice processing.

Alongside this, 93% believe invoice processing could currently be somewhat or significantly improved.

Karri Lehtonen, Vice President of Basware Australia and New Zealand, said "To compete in a challenging economy, a company – and more specifically its finance team – is under pressure to streamline processes and improve efficiencies in operations.

"In fact, 85 per cent of Australian professionals who responded to a 2011 Basware e-invoicing study rate improving operational efficiency as a strategic priority.

"By moving away from paper-based invoicing and towards and electronic, automated process, businesses – SMEs and large corporations – stand to gain huge savings in cost and time. E-invoicing also allows businesses to gain greater visibility over its finances and improve working capital.

"The challenge however is for businesses to work with their suppliers to enable them to start transacting electronically and to ensure they understand the value in e-invoicing solutions," said Lehtonen.

72% of participants in the survey cited operational efficiency as the primary financial priority in 2011 with nearly all of the respondents highlighting e-invoicing as the key to achieving it. However, a too common experience of businesses aspiring to realise automation is that the process is staggered and compliance, changes to legacy processes and enabling suppliers to transact electronically take up significant time and energy.

At the companies surveyed, 74% of invoices arrive on paper and are then scanned for further, often manual, workflow.

These non-automated processes have visible bottom line impacts, as companies fail to benefit from optimised cashflow, working capital management and lower purchasing costs – all of which the respondents recognised to have clear impacts on operational efficiency.

A big challenge is the lack of interoperability between different e-invoicing networks, leading suppliers to be limited by networks that support only proprietary document formats.

61% of survey respondents claimed an open network, where any supplier, buyer or third-party vendor can participate in sending electronic documents irrespective of whether proprietary technologies are in place or not, would increase efficiency and cost savings.

Alongside this, 46% of financial professionals' cite the (perceived) cost of adoption as the primary challenge preventing the rapid uptake of e-invoicing.

By not enabling suppliers to easily start transacting electronically and failing to integrate them into an organisations purchase-to-pay processes, results in reduced spend under management impacts the efficiency of the purchase-to-pay cycle. Suppliers should be able to participate irrespective of size, industry or geography and a dedicated program is essential to enable suppliers to start transacting electronically.

More information about the e-Invoicing survey is available at www.basware.co.uk/e-invoicing

AP automation pays off for Bavarian Hospitality

(from previous page)

Invoices are scanned at the venues on MFPs and the scanned images are sent to the head office. ELAP then automatically interprets and validates the invoice. ELAP incorporates Kofax as a base processing platform. Kofax Capture VRS is used for image clean-up at the head office, while Kofax Transformation Modules and Validation are used for applying the ELAP business rules on the ingested data received from the locations. Efficiency Leaders also developed the custom connectors for Greentree Financials and H&L Sysnet to support full line item processing.

Validations are done in cooperation with the ABR Web service, Sysnet and Greentree. Exceptions are handled by operators at the head office. When the invoice is valid, the relevant details are automatically exported to Greentree, Sysnet, and SharePoint Foundation.

Suppliers must now include a PO number on the invoice along with specific article codes and quantities. It's no longer sufficient to invoice for a box of apples, the numbers or weight must be specified.

"We haven't had any resistance from suppliers," said Margison. "They are all happy to contribute to a more efficient payment system."

Business rules are applied once an invoice has been scanned into H & L. If the data matches the PO it can go straight through for payment from Greentree financials. If there are exceptions, if quantities are outside a certain limit, it will be queried by a validation operator. "The exceptions generally come from variances in quantity or weight of foodstuffs, for instance you ordered 2kg of fish and you get 2.1kg. It depends on the business rules you set whether that gets processed or comes up as an exception," said Dean.

Since the new ELAP system was installed in March, Lisa Margison has been delighted with the transparency and the efficiencies of the invoice automation platform.

"The business is now well placed to manage the rapid expansion plans without increasing back office overheads. This would not have been possible without this technology.

"We now have transparency with purchase orders being raised first in H&L. We now have the control and visibility of our food and liquor costs."

Staff at the group's 16 restaurants are able to search for past invoices in SharePoint via the BHG intranet, avoiding another bottleneck in sending inquiries via the head office.

"We have added five new venues without any new staff, I don't think we would have been able to do that without introducing this solution," said Margison. "During this whole transformation, Efficiency Leaders has consistently underpromised and overdelivered. Our requirements were constantly changing and they easily accommodated any changes. They were very easy to deal with."

Efficiency in the post-EDI era

Lee Fisher of AP automation specialist Efficiency Leaders, explains where we stand on the adoption curve.

Lee Fisher, Managing Director of Efficiency Leaders.

IDM: Lee, are there any particular barriers to e-invoicing?

Lee: EDI (Electronic data interchange) was perceived by many to be the potential holy grail of invoicing as everyone would have the ability to order and invoice electronically. The fact that EDI has only been adopted by a very small percentage of organisations globally has lead to the question: What went wrong? In my opinion, the factors influencing organisations adoption of EDI include:

- Each company may use the flexibility allowed by the EDI standards in a unique way that best fits their organisation's needs and as such there are many different formats.
- Prior to EDI being accepted and thus effective for both suppliers and customers, both transacting organisations need to agree on a format prior to commencing the electronic data interchange.
- Depending on the document type e.g. Invoice, Purchase Order, there are potentially several EDI formats that organisations need to agree upon and implement.
- EDI setup costs have seen this technology generally only adopted by large corporations.

IDM: What is the penetration of EDI and is it likely that it will impact on many industry sectors to a significant extent?

Lee: Whilst many customers love the idea of transacting with their suppliers electronically, the fact is that many suppliers consider the cost of implementing EDI to be extreme. In my experience, EDI is fairly prevalent in the large supply chain organisations as well as in intercompany transactions throughout multi-national organisations. EDI also exists between organisations that have minimal suppliers or where a large percentage of their goods/ services are ordered from only a handful of suppliers.

IDM: When does invoice automation make economic sense?

Lee: Volume of invoices is certainly a factor, however the real consideration should be based on the overall cost for the organisation to accurately process each invoice. Whilst it is often assumed that organisations with low invoice volumes are not a candidate for automation, we have found that several organisations have very large processing costs associated to each invoice due to complex review, receipt, approval and payment of invoices. Additionally, organisations with decentralised capture and or processing of invoices further exacerbates the cost to process.

IDM: Is adoption still low in Australia/ New Zealand? Is that changing?

Lee: Due to the points mentioned above, adoption of EDI between customers and suppliers is still low. In my experience, the market generally has a perception that there is only one, expensive way to transact electronically.

Through this education process, organisations are slowly increasing their receptivity to change and therefore adoption of e-invoicing across a wider industry sector and organisation size is increasing. Managers with financial accountability are becoming aware that the cost of processing documents manually is excessive and extends beyond the accounts payable area.

Many organisations are moving away from silo products to handle business unit specific issues, to an enterprise approach where one platform handles document automation for all business units. ELAP (Efficiency Leaders Automation Platform) is able to assist organisations to transact electronically via our electronic transactions module.

This ELAP module is a very economical, intelligent 'print queue' at the sender which 'prints' and sends an xml document to the customer. The customer is provided with a server based receiver that ingests the data through the same common, auditable, input stream as paper, fax and email. Intelligent automated business rules are then applied at the front end, including automatic line item extraction and validation, before sending any exceptions out via workflow to the wider business users.

Importance on building significant logic into the front end should not be under estimated, as by taking this critical step, organisations are able to significantly reduce the amount of workflow required by the wider business and thus reduce their licensing and professional services costs dramatically.

SmartCapture wins the ratings for Oz pay TV network

One of Australia's premier pay TV providers, delivering more than 200 channels to over 1.63 million subscribing households, has implemented an innovative accounts payable automation solution from TopSoft to handle more than 4000 invoices received per month.

TopSoft's "SmartCapture" automates the capture of invoice data and loads this into Oracle PeopleSoft Enterprise accounts payable from multiple sources:- emailed PDFs, softcopy files and scanned hardcopies. Deep integration with PeopleSoft via ODBC links enables the validation of vendor ABNs, purchase orders and bank accounts, and for the direct export of data and images to the PeopleSoft voucher build and audit tables.

The pay TV company is moving towards a completely paperless environment in which all invoices are captured as email attachments, softcopy forms, or scanned images. Where SmartCapture and PeopleSoft agree on the critical fields in each invoice, records will proceed directly to matching and payment without human intervention – full "lights-out" processing.

The company's plan is that 80% of invoices should include an approved Purchase Order number. Currently 98% of invoices already have an ABN and most also have a bank account number. This makes it possible for SmartCapture and PeopleSoft to perform rigorous validation using only a small set of fields as the main drivers. Where a Purchase Order has been raised as required by the company's procurement policy and has been receipted by the buyer in PeopleSoft, this means that PeopleSoft already "knows" what should be on the invoice.

Suppliers will be encouraged to invoice by email (PDF or any other common format) directly to designated mailboxes. This approach will benefit suppliers as email PDFs are increasingly the default method preferred universally by billing systems, without the need for printing or postage. The company's automated system will then ensure a quick turnaround and on-time payment.

The TopSoft solution polls Microsoft Exchange mailboxes for invoices which arrive as email attachments, and also network folders for softcopy files or scanned images.

The Accounts Payable team is equipped with desktop scanners, model Canon Image Formula DR-3010C, which combine a compact form factor with high speed (30 ppm) and duplex capability. SmartCapture uses pre-delivered flexible templates and rules for Australian and overseas invoices to provide intelligent extraction of data from the invoices.

This includes extraction of the following fields from the invoice images: PO Number, Vendor ABN, "Tax Invoice", Bank Account, Vendor Name, Business Unit Name, Invoice No, Invoice Date, Due Date, Invoice Gross Amount, and GST Amount.

SmartCapture provides the ability to pre-validate against external information such as ERP systems. Three main table views in PeopleSoft are utilised:

- active vendors with Vendor ID, Vendor Name, Vendor Location, Address Sequence, ABN, Currency, Address, Email and Banking details;
- outstanding Purchase Orders with PO ID, Receipt Status, Vendor ID, ABN, Business Unit.; and
- Buyers by division with their names and email addresses.

The use of bi-directional ODBC links means that the two systems converse in real time throughout the business day. This eliminates potential issues with timing differences or flat file interfaces.

SmartCapture Error Correction users see live information from both the invoices from OCR and also from the PeopleSoft database. For example, where the Bank Account on the invoice differs from the vendor bank account in PeopleSoft, the user receives a warning message and will see both values side by side. The user cannot export the invoice to PeopleSoft until the discrepancy has been satisfactorily resolved.

With the implementation of scanning, the Accounts Payable team has moved away from data entry to become knowledge workers who oversee the information flow and resolve any exceptions:

- scanning of hardcopy invoices (which are gradually decreasing in volume)
- SmartCapture verification (i.e. fix any scanning errors or rejected invoices)
- PeopleSoft voucher build process errors (e.g. identify the relevant PO Lines where this could not be done automatically by the voucher build process).

The use of this technology makes the process more visual and much faster. Job satisfaction is enhanced. It has also enabled staff to achieve further efficiencies by working with buyers and suppliers to migrate to the new business processes.

Everyone in the business is able to view invoices via the "Invoice Image link" on the PeopleSoft voucher screen from the moment the invoice is received, and irrespective of geographic location – no more hardcopies "lost" in the internal mail, or phone calls to Accounts Payable regarding the whereabouts of an invoice.

Pay cycle approvers and accounting staff can also view invoices via the invoice image link.

Both the scanning application and PeopleSoft will filter out any duplicate invoices, so the risk of paying an invoice twice is reduced.

Ten AP automation objectives

- Capture invoice data electronically from all sources:- email, softcopy forms and scanned hardcopies – no more paper;
- Encourage suppliers to invoice via email PDF with a PO number and bank details;
- Optical Character Recognition of invoice data;
- Rigorous realtime validation and correction;
- Validate Australian invoices on: ABN, PO number, bank details;
- Validate Overseas invoices on: PO number, bank details, vendor name;
- Provide "Forward to Buyer" and "Return to Supplier" icons which users can click to generate system emails with the invoice image attached;
- Export invoice data and invoice image files to ERP voucher staging tables;
- Leverage ERP functionality such as voucher build, matching against PO / Receipts, GST check, invoice balance check, payment processing; and
- Populate audit history tables within ERP for reporting with standard tools.

So you want to integrate supplier invoices with SAP?

What are the alternatives available when planning to introduce accounts processing automation for SAP? Abie Spies looks at the options.

Automating accounts processing just makes good business sense for almost all organisations. Invoices can be scanned and workflowed for processing, approval and payment. If organisations are also using SAP for financial and logistics management, the benefits just add up and the case for integrating your invoice handling with SAP is virtually a no-brainer.

Exactly what constitutes invoice integration into SAP is, "however, a 'how long is a piece of string?' question. It can range from simply linking an image of an invoice to an SAP transaction electronically, to a fully-fledged automated system that scans high volumes of invoices, subjects them to optical character recognition (OCR), and automatically populates SAP with the data thereby allowing for straight-through processing. All done without any human interaction. For most organisations, the truth lies somewhere in the middle. This makes understanding the exact business requirements and selecting the 'right' solution so vitally important.

Historically SAP was lacking in some invoice scanning functionality (like a scanning interface, OCR engine etc.). Therefore many independent companies stepped into the breach and developed SAP-certified solutions for the scanning and integration of invoices to SAP. These include Open Text, Readsoft, Esker, Kofax and many others. All of them deliver competent integration solutions, and none of them are dominating the market thus far.

Because most of these solutions are very feature-rich (and consequently quite expensive), some smaller organisations choose to build the key features into their standard SAP systems. This is done by utilising standard SAP workflow and ABAP routines, sometimes married up to inexpensive scanning solutions.

What are the key classes of Invoice Management solutions available to organisations using SAP?

SAP has over the past few years forged a very close alliance with one of the bigger players, Open Text, and now sells the "Vendor Invoice Management by Open Text" (VIM) product through the SAP sales channels. This is a high-end full feature solution, and if your organisation is mature enough to use the functionality and can afford the cost it may be a rational add-on to your SAP suite.

Other SAP-certified solutions like Readsoft, Esker etc. have been around for a long time and have a large installed base of very successful users. If the functionality they offer suits your needs and the price suits your pocket, they offer very competent and efficient solutions. ·All the commercial solutions use standard SAP ABAP and workflow routines to build the additional screens and functionality. So, why can't you just build it yourself? If you just need limited functionality, this is a very feasible option, provided you have access to a developer who really knows this field.

Which option is right for you? Here are a few pointers to consider:

Take a good hard look at your organisation's maturity, and what level of business process automation you could embrace. Most organisations do not have the competence, maturity and level of trust required for deep automation, and therefore implementing a more complex solution than your staff can handle could be very risky. Sometimes 'baby-steps' are best.

Understand your invoice and AP business processes, how they will change with automation, and the change management necessary to make a success. Don't bite off more than you can chew.

Consider different technology options, as outlined above. No solution is likely to be a 'perfect fit', so do your homework and talk to people with knowledge of different systems. Talk to reference customers, and make sure you cut through the 'new-car-owner' waffle to get to the real truth.

Make sure you understand all the costs related to implementing different options (including associated functionality, like content storage). Compare apples with apples.

Consider the implementation expertise available for the alternative options. Consulting expertise for different solutions varies significantly in Australia, and competence of implementation partners will have a material impact on your success. A great product can be reduced to a dog by an ordinary implementation, while an average product can be made to sing in the hands of a master. When organisations get accounts processing automation right, the benefits are spectacular. This is one area of SAP where the investment cost is often recovered in months, rather than years, but that is just the tip of the value iceberg. The real benefits are in what it does to your business efficiency. Plan your implementation well and you will fly!

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Esker takes SAP into the cloud

Esker is expanding its cloud offering in Australia/New Zealand in 2011 with the launch of a versatile document processing solution for SAP users.

Esker is extending its automation cloud platform with SAP-certified integration for both paper-free accounts payable invoice processing and 100% electronic accounts receivable invoice delivery as well as automated processing and delivery of orders and other documents in the cash conversion cycle.

Esker's DeliveryWare server platform is already certified for integration with SAP applications to automate processing of sales orders, customer invoices, purchase orders, vendor invoices and other documents. Over 1,000 companies running SAP are running the Esker DeliveryWare platform and solutions to automate the process of their business transactional documents.

Christophe DuMonet, Managing Director of Esker Australia & New Zealand, said organisations are now embracing the ROI value of using a single platform, either in the cloud or on-premise, to automate multiple document processes and formats including fax, mail, email, Web, EDI/IDoc and XML - with capabilities encompassing document capture, workflow, delivery and storage.

AUTOMATION CAN SAVE ORGANISATIONS 40 TO 60 PERCENT OF AP OPERATIONAL AND ADMINISTRATIVE COSTS.

Almost 50% of Esker's worldwide revenues are now coming from its cloud-based solutions, which also integrate with a range of ERP platforms ranging from enterprise down to small and medium sized business.

According to Esker, automation can save organisations 40 to 60 percent of AP operational and administrative costs. Other benefits of automated vendor invoice processing include shortened reconciliation and payment cycles, increased visibility of invoice processing and approval status, improved reporting and audit trails, elimination of duplicate payments and fraud, and strengthened credit rating, compliance status and supplier relationships.

"There is a significant potential in Australia and New Zealand for organisations processing from 2,000 invoices a month to gain efficiencies through a cloud AP automation solution," said Dumonet.

"These organisations may have looked at on-premise solutions in the past but found the staff and operational savings did not justify the upfront investment required."

With the Esker solution, supplier invoices go to one central location for imaging and electronic approval by the appropriate people. Invoice data goes into the SAP system automatically and invoice images are immediately available from the SAP interface.

Automated fax processing

Esker DeliveryWare is already being employed by a range of Australian organisations, primarily to integrate automated faxing and processing of incoming faxes.

There are still a large number of organisations that prefer to transmit a purchase order (PO) via fax rather than email, as fax is still the only communication method to provide a digital confirmation that the document has been received.

Esker DeliveryWare can also automate and streamline the paper-heavy, labour-intensive process of approving customer invoices within accounts receivable received via fax and email, Esker DeliveryWare performs database lookups and delivers an XML document to a SAP system.

"There is a significant potential in Australia and New Zealand for organisations processing from 2,000 invoices a month to gain efficiencies through a cloud AP automation solution." - Christophe DuMonet, Managing Director of Esker Australia & New Zealand

Introduced in March 2011, the latest version of Esker on Demand features additional functionalities for the automation of vendor invoices, including the capacity to process vendor invoices according to formats and specifics in over 20 countries: invoice layout, paper size, currencies, date formats, tax codes, accounting charts, etc.

Developed as a global document automation solution for all business processes (vendor invoices, sales orders, customer invoices and document delivery), the new version of Esker on Demand also includes new features for vendor invoice automation.

Vendor invoices are automatically matched with corresponding purchase and delivery orders, regardless of the ERP system.

Touchless mode enables completely automated processing of invoices, void of any manual intervention — from data extraction (vendor name, invoice number, date and amount) to automatic verification and integration into an ERP system.

New OCR engine

A new Optical Character Recognition (OCR) engine delivers improved recognition: The new version of Nuance Capture SDK 16.4 is integrated, guaranteeing improved recognition quality for line items in particular and enabling even more invoices to be processed in touchless mode.

An enhanced flexible and powerful workflow engine allows more complex workflow design, including the ability to add approvers during the approval process, to send invoices back to the previous step, to reset workflows, etc.

Improved default verification and validation workflow includes the ability to return an invoice to the vendor's accounting department, to block payment, to put an invoice on hold or to request additional information.

During the invoice validation stage, AP is alerted to any invoice that resembles one that has already been processed. The system compares values in different fields — vendor name, part number, date and total amount — to prevent double invoice entry and subsequent double payment.

This new version of Esker on Demand features SAP standard interface integration and a multi-platform connector enabling implementation with any ERP system. Its official launch is scheduled to take place at the forthcoming SAP User Group (SAUG) Summit in August 2011 in Sydney.

OB10 launches in APAC region

The global e-Invoicing network OB10 (www.ob10.com) has signed an agreement with Scan One Asia Pacific for the sale of its e-Invoicing services in Australia and New Zealand.

Scan One Asia Pacific is an Accounts Payable Solutions company based in Australia and this agreement will enable them to add OB10's e-Invoicing solution to their existing suite of offerings.

Stefan Foryszewski, SVP Business and Product Development, OB10, commented: "We are delighted to be working with Scan One Asia Pacific to promote our e-Invoicing services and help build on our e-Invoicing network in the APAC region. E-Invoicing brings not only financial but also green benefits and this new partnership will more easily enable firms to realise these associated benefits."

Gary Morley, Sales & Marketing Director, Scan One Asia Pacific, commented: "OB10's e-Invoicing network provides unparalleled speed and accuracy in the processing of invoices and we are looking forward to offering this as part of our Accounts Payable Solution."

Bottomline digs in downunder

Bottomline Technologies is a multinational provider of collaborative payment, invoice and document automation solutions. In Australia, Bottomline supplies in-house AP Automation solutions employing its own workflow platform and an OEM scanning engine. The solution was originally developed for JD Edwards, Oracle E-Business and Microsoft Dynamics AX, but is now capable of being applied to any ERP product. Bottomline is keen to make a move into SAP invoice automation, although it will aim to target specialised areas and not compete directly with traditional players such as ReadSoft and Open Text.

Customers in Australia and New Zealand include Pioneer Road Services (now part of Fulton Hogan Ltd), BIS Limited, Dalrymple Bay Coal Terminal, BGC Contracting, Warrnambool Cheese & Butter Factory. Bottomline also has a strong background in outbound document processing, which means the orginal metadata associated with an invoice is stored once it has been printed or emailed. When the invoice is returned with payment it can be linked up with the original metadata back into the ERP system through a Related Document, URL link.

"We are able to provide a real end to end solution," said Dennis Kopanas, Business Development Manager at Bottomline Technologies Australia. "From a multi-channel document output delivery and business exchange communications hub to a fully automated inbound document scanning, data extraction/verification, workflow and business process automation solution. Our customers also like the fact that its not priced on a click count."

Fuji-Xerox takes AP to the cloud

Fuji Xerox Australia is to offer a new accounts payable automation service hosted in the cloud, using EMC's Enterprise Content Management software coupled with BRT's APxCelerator accounts payable automation software. Representing an early deployment of EMC's Documentum xCelerated Composition Platform (xCP) as a cloud-based offering in Australia, the Fuji Xerox AP Service will manage all supplier documents through Fuji Xerox Australia's document scanning centres with a hosted workflow.

Anthony Cogswell, Executive General Manager Global Services, Fuji Xerox Australia, said, "Our AP SaaS will provide benefits to our customers, such as a swift implementation with no ongoing maintenance, processing cost savings, and no upfront investment in software and infrastructure."

Fuji Xerox Australia

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We deliver measurable sustainable benefits to your organisation with a best practice and flexible Digital Accounts Payable Service. Through digitising and automating your Accounts Payable documents and processes, we streamline and simplify authorisation processes, freeing up your staff to focus on higher value activities, cutting your processing costs and providing you with end to end visibility. Leveraging our established network of business processing centres allows for a fast service implementation and realisation of the service benefits. As you would expect from Fuji Xerox, you get the local focus and global capability from an established leader in document management.

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Medius develops and provides MediusFlow – world-leading purchase-to-pay and invoice automation software solutions that enable companies to quickly optimize their accounts payable processes and reduce costs.

We help organizations increase the efficiency and quality of their accounts payable processes from purchase to pay by providing our powerful, easy to deploy and cost-effective MediusFlow workflow solution to automate their existing paper-based, inefficient manual AP routines. We couple the MediusFlow Purchase-to-Pay (P2P) solution with professional services that provides our extensive experience in successfully helping companies to integrate MediusFlow with their existing business and purchasing systems quickly and effortlessly. Medius can provide your accounts payable organisation with a world-class accounts payable processing solution that delivers a very fast ROI. Contact us to start a dialogue about your needs with a Medius representative.

Basware

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Basware is the global leader in purchase-to-pay solutions and enables more than 1,000,000 users in over 60 countries around the world to automate and streamline their financial processes. Basware solutions and services enable companies to improve cash positions, optimize working capital and maximize the agility of their finance operation across the purchase-to-pay cycle.

In March 2011, for the 2nd consecutive year, Global Finance magazine named Basware as the best global provider of Electronic Invoice Presentation and Payment solutions. Basware was awarded this recognition because of its innovative leadership in invoice automation, procurement and global commerce connectivity solutions that improve supplier and buyer relationships and promote electronic document exchange around the world, through one of the world's largest open networks for e-invoice and purchase message transactions. Basware solutions complement and integrate seamlessly with existing ERP solutions, providing organisations with a mix of best-of-breed technologies to meet their constantly changing business needs.

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ReadSoft is a global leader in Process Automation, specialising in business process improvements to Purchase to Pay, Order to Cash and Enterprise Capture processes for medium to large enterprises and Shared Service Centres. We deliver and support leading OCR/ICR (Optical Character Recognition or image capture technology) and workflow applications for Process Automation, with seamlessly integrated solutions for SAP and Oracle ERP systems. Our process automation solutions have been selected by an impressive range of multi-nationals and government institutions seeking to optimize their return on investment whilst improving governance, control, visibility, and efficiency, to all paper- and request-driven business processes. ReadSoft's solutions significantly reduce the use of paper and enhance sustainability. Areas for automation include, Accounts Payable, Claims, Applications, Surveys, Registries, Timesheets, Sales Orders, Inbound Correspondence, and many more. The experience gained from thousands of installations means we can offer leading edge solutions based on best practice for your specific business.

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EzeScan enables its clients to substantially slash the cost of deploying batch scanning solutions for unstructured (correspondence), semi structured (invoices) and structured (forms) hard-copy documents. EzeScan enables images to be integrated seamlessly with many ECM and/or EDRM Systems using built in integration connectors. EzeScan works with any TWAIN/ISIS scanner or any brand of networked MFD to unleash the full power of your scanning hardware.EzeScan provides 3 levels of EDRMS integration: Scan to Input Queues; Scan/Index using an ECM registration form; and Auto Scan. Index/Upload using its inbuilt indexing and upload modules.

EzeScan has a proven track record of use with HP TRIM, Objective, Autonomy iManage WorkSite, Open Text eDOCS/Livelink, Microsoft SharePoint, Xerox DocuShare, infoXpert eDRMS, Meridio, Laserfiche and Alfresco. EzeScan solutions range from basic manual data entry to highly automated forms processing. With over 600 installations in Australia, NZ ,Canada & the UK, EzeScan is your ideal batch scanning application.

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Esker, a leader in document process automation solutions, provides best-in-class accounts payable automation solutions, sales order processing solutions, accounts receivable solutions and e-invoicing solutions. Esker clients include successful Australian and multinational companies such as BHP Billiton, Orica, PaperlinX, James Hardie, NEC, Johnson & Johnson, Siemens, Samsung, SONY, Sharp, Sanofi-Aventis, etc. Over 1,700 companies in Australia run their business on Esker solutions today. With its comprehensive document process automation platform, Esker helps companies QUIT PAPER. Solutions for procure-to-pay and order-to-cash business processes include sales order management, e-invoicing, e-purchasing as well as Accounts Payable.

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TopSoft SmartCapture Invoice Edition is custom-made software, using advanced technology developed and actively implemented by TopSoft for flow input and processing of large volumes of invoices and other paper documents. SmartCapture integrates deeply with SAP, PeopleSoft and other EDMS.
TopSoft customers include Australian Government Departments and Offices, with application ranging from Forms processing to Correspondence processing and automatic routing. Topsoft meets appropriate regulatory and industry performance standards and Commonwealth Government quality assurance and service delivery standards.

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Through our specialisation in inbound information management, Decipha can provide tailored invoice processing solutions to meet your business requirements. This includes the capability to validate incoming invoice data to enable straight through processing (with exceptions managed via workflow). Through software partners, Decipha also offers certified integration with major ERP systems including Oracle and SAP.
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Converga is a leader in Business Process Outsourcing, with a focus on automating financial processes, delivering strategic advantages and cost savings through our range of innovative solutions. Our Paperless Accounts Payable (PAP) solution is a technologically advanced, environmentally friendly, accounts payable workflow solution that recognises both paper and electronic invoices and seamlessly incorporates them into one single, instantly accessible system. There's no software or hardware to buy. No installation or license fees – only a secure online solution ready to be implemented in your business today. Converga are also pleased to offer a variety of automated document management solutions such as Digital Mail, Form Automation, Claims Processing, Contracts & Case Management, Records Management and High-Volume Scanning Services.

Scaling the peak

For Baptist Community Services, a major project to upgrade to a SharePoint intranet was like climbing Mount Everest. Safely atop the peak, IT Applications Manager Arvee Manaog and Senior Systems Analyst Kusal Mijewantha reflected on the epic journey at the Australia SharePoint Conference 2011.

Baptist Community Services is a leading not-for-profit Christian care organisation that has been serving the aged and people living with disabilities for the past 65 years.

With an annual turnover of $200 million, it presently has over 3700 staff and more than 1000 volunteers operating at 70 sites across NSW and the ACT. This includes 2500 computer users.

SharePoint 2007 was chosen in 2009 to form the basis of a completely redesigned intranet, the project was completed in 15 months.

Users were facing the typical problems of a large organisation, information was hard to find and there were multiple copies of documents scattered over many different sites. An existing intranet solution was not popular and staff did not find it user friendly.

After the selection of MOSS 2007, an Intranet Steering Committee was formed and immediately began looking for some "Quick Wins" to get users excited about the possibilities of the new intranet.

"We had support from the top with management on board with the idea of change, but we wanted to show some immediate benefits as our way of saying 'Change is coming - there is hope, we are doing something'," said Manaog.

Searchability was improved with the rollout of the Google search Appliance to ease that pain point. A revamp of the intranet front page was accompanied by the rollout of TeamSites and meeting workspaces to show the functionalities available in MOSS 2007.

The home page of the BCS intranet. Team Sites have a public and private facing componet using SharePoint's Targetted Audience feature.

An Intranet scan tool was also developed to provide a feel for how many sites would need to be migrated over. This also gave a view of the history of each site, when it was last accessed and who uses it. It revealed there were more than 500 sites with some that had not been accessed for more than four years.

A project team that included technical staff and Intranet champions then tackled the job of designing an information architecture, informed by focus groups held at all office locations in ACT and NSW.

A review of policies and procedures and forms found more than 1400 with extensive duplication between the existing intranet and BCS's TRIM recordkeeping system.

"We decided we would have one source of truth, everything would be in TRIM," said Manaog.

Integration between SharePoint and TRIM was tackled to provide a single source of truth for policies, procedures and forms. SharePoint provides another doorway to TRIM's Document Library so that users think everything has been saved on the intranet.

Search was further enhanced through the improved search functionality in MOSS 2007.

"Google Search returns everything, and users end up being overwhelmed with the results list," said Manaog.

"Because it is also hard to configure, we decided to go for the search function in MOSS 2007 and configure it using Search Scopes."

A "QuickFind" function was also implemented based on 100 Keywords commonly used by the organisation, so staff can easily find a leave form or

The new intranet features the ability to conduct People and Places search, with Google Maps integration, with SharePoint-TRIM integration for policies and forms. Active Directory self-service gives staff the ability to change their listed profiles, although this is monitored and audited by BCS' Community Relations Unit (the organisation's marketing division). A 3rd party software product, AD Self-Service Suite by The Dot Net Factory, allows for storing staff pictures within Active Directory and restricts which fields to modify based on security roles.

submit car expenses for instance. Workflows were initially tackled using an in-house developed engine created in MOSS 2007, however these are now being redeveloped in K2. K2 Blackpearl enterprise workflow and BPM software has been implemented to improve business process.

Senior Systems Analyst Kusal Mijewantha said, "K2 provides a massive saving on development time and automates the process of creating workflow forms."

"K2 PROVIDES A MASSIVE SAVING ON DEVELOPMENT TIME AND AUTOMATES THE PROCESS OF CREATING WORKFLOW FORMS." - SENIOR SYSTEMS ANALYST KUSAL MIJEWANTHA

There were some obvious early targets to exploit the collaborative capabilities of SharePoint. The AgedCare division handles major Property Development projects worth up to $200 million each. There was a need for a collaboration site that would bring together document libraries and provide role-based security, version control and alerts.

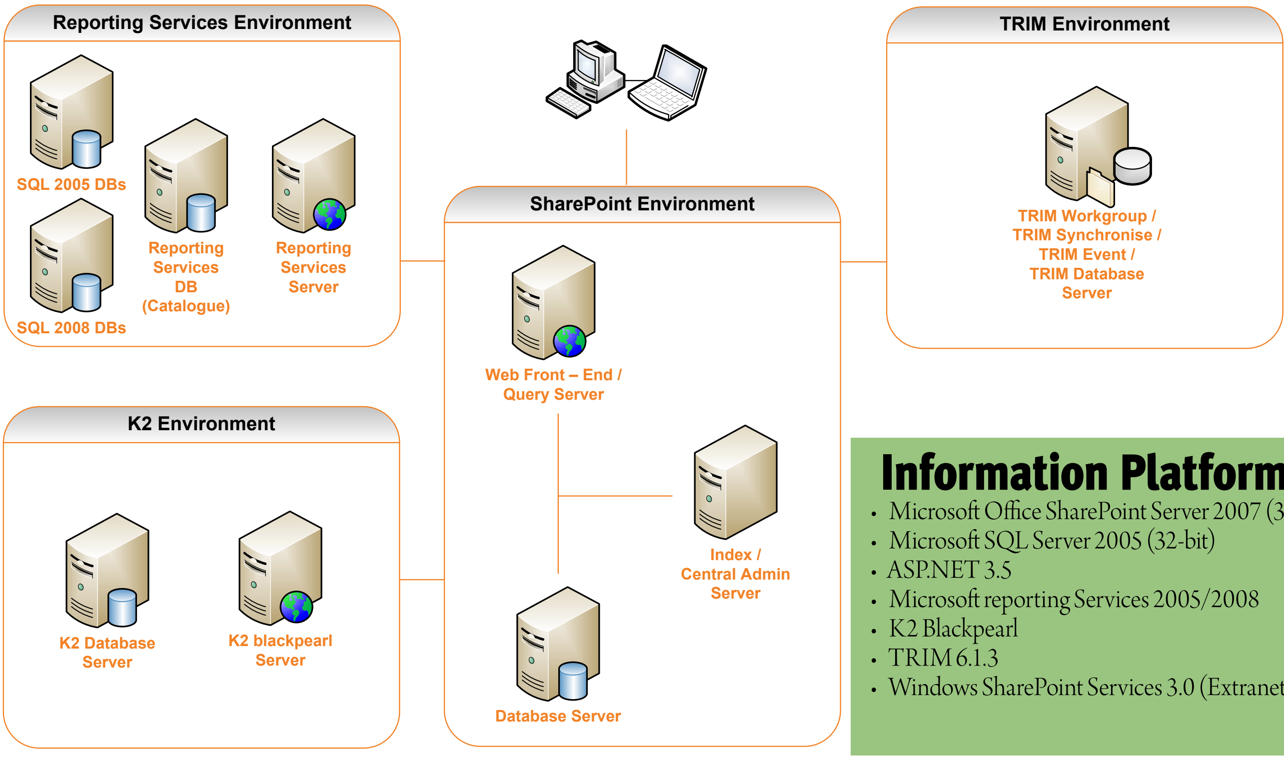
The use of external sites to handle collaboration with engineers, interiors designers, architects and project managers was costing $30,000 per project. With eight projects on the boil at one time this added up to a major cost. Using out-of-the-box WSS 3.0 functionality, BCS built a series of external extranet sites that could be used by up to 30 different organisations working on each project, featuring a Wiki, Document Libraries, Calendar and Alerts.

Manaog says communication was essential to the success of the SharePoint intranet project.

"We decided we would have one source of truth, everything would be in TRIM." - IT Applications Manager Arvee Manaog

"There is no such thing as too much communication. It was also crucial that our Governance Committee set a roadmap and path for the intranet to prevent proliferation of portals and TeamSites."

Future challenges include implementing remaining workflows using K2 and upgrading TRIM to Version 7 and SharePoint to 2010.



Information Platform

- Microsoft Office SharePoint Server 2007 (32-bit)
- Microsoft SQL Server 2005 (32-bit)
- ASP.NET 3.5
- Microsoft reporting Services 2005/2008
- K2 Blackpearl
- TRIM 6.1.3
- Windows SharePoint Services 3.0 (Extranet)

An evolutionary approach to end user empowerment with SharePoint 2010

Ishai Sagi, is the director of Extelligent Design (www.exd.com.au) – a Canberra based SharePoint consultancy, and author of SharePoint 2010 How-To. In this article Ishai argues for an evolutionary approach to information management (using SharePoint and Microsoft Office in particular): Let users define and build what they need, and then get an expert to tweak it.

Microsoft® SharePoint® Server 2010

A few years ago, I helped a company that was migrating its entire system from Microsoft Office 97 to the latest Microsoft Office technology (back then). My client's IT department wanted to find out how many Microsoft Access databases needed to be migrated, so that they could analyse which ones could be replaced by SharePoint lists instead—thereby reducing the number of Microsoft Access licenses the company required.

The IT staff ran a script across every computer and learned that the average was more than three databases per user. Maybe that doesn't sound as amazing as it should, so I'll rephrase it: In an organisation of 5,000 people, 17,000 databases were scattered across the personal computers.

Many IT managers would be dismayed by this story. Why do all these data islands exist at all? Why didn't the users come to the IT department when they needed a data storage system? What a disaster!

A lot of single-table databases were floating around with no primary keys. Most of these Access databases were extremely inefficient, as though they were written by someone's cousin who learned Access in high school—and probably most of them looked like The Daily WTF entries—but there was one thing to say about all of them: They worked.

At some point in time, users saw a way to improve their jobs. They might or might not have tried to get help from the IT staff. Maybe they weren't helped because the IT department was too busy on bigger projects, or didn't have the budget; maybe the users didn't know that the IT department could do the work for them.

In any case, users found a way—creating the application by themselves.

Importantly, in a situation like this, the application evolves. The end user maintains it, reinvents it, and improves or scraps it when it's no longer useful. If it's very useful, the user shares it with colleagues, and the application spreads—like a Web 2.0 viral video. Eventually the application may be noticed by the IT department (where the software engineer will have a heart attack after seeing the database schema). Then the software will be rebuilt using scalable infrastructure and tools, and employing decent coding practices. But in the meantime, that user-created application helps the business to maintain its bottom line.

These end-user applications serve a purpose: They help employees to do their jobs more efficiently. This makes those databases good applications, no matter how a software engineer might view them.

The Problem with the Evolutionary Approach

The "evolutionary approach" has a lot of things going against it. Consider the scenario: 17,000 Microsoft Access databases across many desktops. Are they backed up? What happens if they're lost? Are they secured, or can anyone access them? Who supports them if they fail? Does each database conform to the roadmap and architectural guidelines that the organisation has established?

Those Access (or similar) applications cost the organisation money, even if it doesn't come out of an IT budget. When an upgrade is required, the organisation suddenly is faced with having to buy the upgrade for that application, and then deal with very angry users whose self-made databases suddenly don't work.

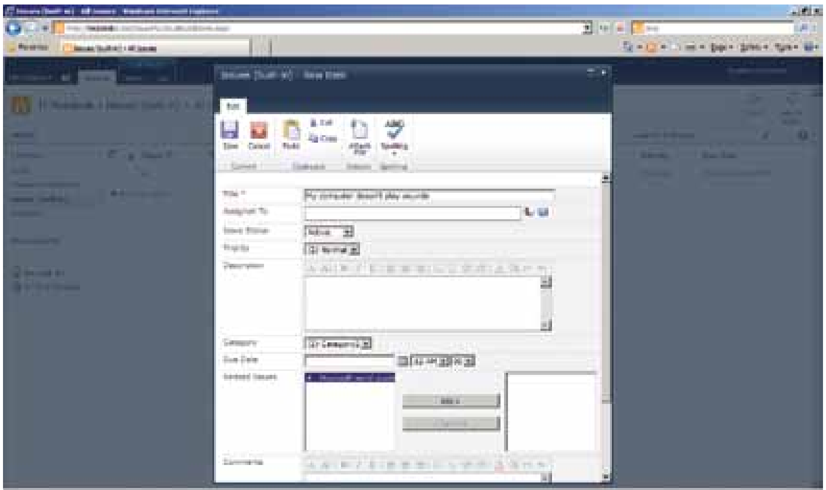
These are the main reasons that many companies don't install Microsoft Access on users' machines in the first place, thereby limiting the possibility of the evolutionary approach to information management within the organisation. Users are reduced to managing their information in Microsoft Excel worksheet or Microsoft Word documents. However good those applications are at other tasks, Excel and Word are not designed for sharing information in that manner—but most IT managers prefer that option versus the alternative of having all those databases and custom applications floating around.

So the evolutionary approach seems doomed. But is it?

SharePoint 2010 Lists to the Rescue!

Web-based applications showed us how to build software that emphasises sharing and collaboration. These applications, which don't require a per-workstation license or deployment on each desktop in the organisation, often make a lot more sense than all those databases floating around in the

Ishai Sagi is a Canberra based SharePoint consultant and director of Extelligent Design (www.exd.com.au) – a company that offers SharePoint consulting, products and training in Australia and New Zealand. He is the author of two SharePoint end user books and co-manages the Canberra SharePoint user group.



An entry form for a simple task list in SharePoint 2010

evolutionary approach I discussed earlier.

When Microsoft first introduced SharePoint Team Services (STS) as part of the FrontPage XP suite, users gained another element in that evolutionary approach. Suddenly users had an application that allowed them to create simple data-entry and information-management solutions—without training, without complex client tools, and without having to wait for a developer in the IT department to build a database for them.

Today, SharePoint Foundation is part of the package when an organisation purchases a Windows Server operating system, making SharePoint easy to deploy.

Letting end users develop applications in SharePoint makes a lot more sense than doing it in Excel or Access - The IT department can see what users are developing. The data can be secured. A SharePoint administrator can monitor the permissions given to each site, each list—even to list-item objects. No longer do we have to hope that users have set passwords on their Access database files. Now the security of the information is integral to the system.

What kind of evolutionary information-management can be done with SharePoint? Why has it succeeded with users?

A Short Introduction to SharePoint 2010

You're probably at least vaguely aware of Microsoft SharePoint. It's an ASP.NET application, a platform that allows users to build websites, using Microsoft SQL Server as the database. SharePoint users can create multiple websites, with different content and for different purposes.

Microsoft SharePoint 2010 (as well as previous versions of SharePoint) has a mechanism called lists that look similar to Microsoft Access tables. A list is a container for information, similar to a simple database or worksheet, and is the most common way to manage information in a SharePoint site. In a list, data is gathered in rows; each row is known as a list item. A list can have multiple columns, also known as properties, fields, or metadata. Users enter information in these rows, and at the back-end that data is stored in a SQL database.

This means life is easier for business users – they don't need to create forms for data entry or for searching, because SharePoint has those capabilities built in. Users cannot create macros or custom code (one limitation of SharePoint lists, as opposed to Microsoft Access), but most users still manage to get exactly what they need.

Lists can have relationships, such as "lookup" columns pointing from one list to another, to the user database, or to external information sitting in a line-of-business application. A common example is to create lists for customers, products, and orders (the latter with a customer column and a product column). This kind of order-entry application can be created by an end user in a matter of minutes. Allowing users to see a need and act on it is the whole purpose of the evolutionary approach.

Users can develop any number of list-based applications for themselves. In addition to their obvious similarity to Microsoft Access tables, some lists are actually based on list templates that Microsoft has provided in SharePoint:

- A task list allowing users to assign and track tasks within the team.
- A survey for gathering opinions of fellow employees.
- A list of projects and a related list of contacts.
- A vacation calendar in which each team member records when he or she will be away, allowing the manager to have a unified view of vacations.

Microsoft SharePoint lists are more than simply forms for data entry. They also provide users with various ways of getting at their data. Even the free version of SharePoint that comes with Windows Server includes functionality for searching on lists by using keywords. Users can create public or private views to display the data in different ways, and to ease their search for information. Views can be sorted, filtered, or grouped. For example, a "Data Sheet" view works similarly to an Excel worksheet, a calendar view is date-based, and a Gantt view shows project status.

Users can add columns to lists and manage their security on those lists, all without the intervention of the IT department. The IT department can rest easier knowing that all the data is backed up (since it's on SQL Server, which presumably is well managed by the data centre). Users can share information just by sending other users a link to the list and giving them appropriate permissions. If the IT department sees a user-created list that's a good idea, they don't need to redevelop it in another platform; they can just reuse that list in other sites.

Before long, users will demonstrate their lists to colleagues in other departments, and the use of these lists will grow even without IT department intervention. The business will gain efficiency without having to contract business analysts to figure out what users want, since the users themselves build what they want!

Survival of the Fittest

I can hear you thinking: "With all these crazy users zooming around creating applications like mad, we'll have thousands of applications, just like that customer of yours."

True.

Microsoft has given us some tools to help manage that possibility. For example, the SharePoint administrator can warn users about site collections that are not used after a certain period, and even have an option to delete unused lists after a certain length of time has passed. Unfortunately, a single site may have lots of lists, and some of those lists may not have been used in ages, but we don't have the tools out of the box to report that information, or to deal with those lists automatically. However, that sort of tool can be developed using the SharePoint API, and third-party applications have been developed for that purpose.

Obviously, I'm not suggesting that you leave everything to evolution. If you do that, users will create applications instead of doing their real jobs. But if your IT department lacks resources, and if users can create small, standalone SharePoint data-entry application lists that won't clash with your architectural plans for the future of the business, then it's okay to let users build their own team discussion boards, tracking lists, etc. Doing so can reduce the load on your IT staff while increasing productivity in the business, and that's the whole point of the evolutionary approach.

If you let users play with the tools (in this case, a SharePoint site), they may or may not produce something productive. You can bet that if they build something productive, they'll use it; and if they create something that makes them less productive, they'll drop it themselves.

However, sometimes a good shove in the right direction from a software developer can lead to greater things. Here's the key: Let users define and build what they need; then get an expert to tweak it. A software engineer who knows what an index is and how it works, and who knows how to design a system that works more efficiently, can get involved with the applications created by the end user. The developer can assign indexes so that searching will be better, suggest new views that can be created, or find a better way to include more information.

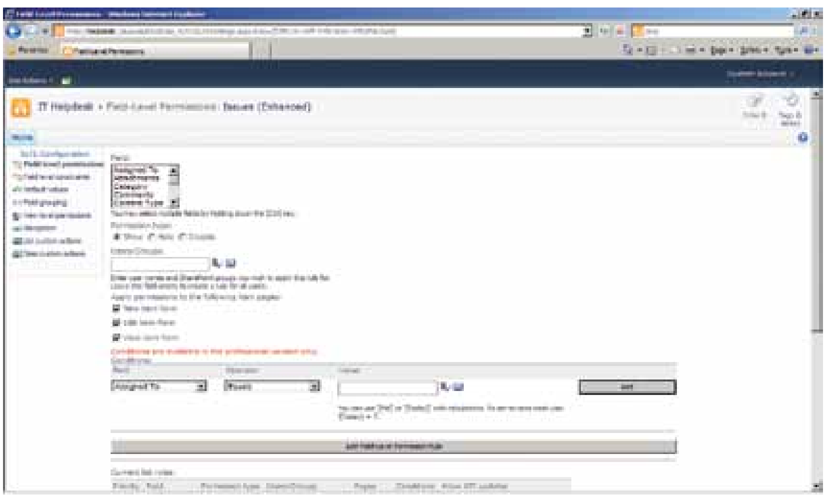
N.B. A review of what users are doing can also tell you what your IT department is not doing. If users are creating a lot more applications than you expected, review your IT department's resources and policies.

Helping users to tweak their custom creations should start early, in the design phase. I once saw a user managing a team's "to do" list by using an announcement list. Why? Because that SharePoint template included an expiration date after which the announcement is no longer displayed. The user didn't know how to create that sort of thing by using task lists—he wasn't trained in adding or removing columns. He created an efficient, working system, but obviously it could be improved.

In this example, the job of the expert designer is obvious: Create a "to do" list template and publish it to users. You don't need to train the users to use it, or even tell them about it; the next time a user has the same dilemma, he'll find the "to do" template and start working with it. Some users may improve on your design; some will reject it and create their own kind of list. But ultimately everyone wins from the expert's involvement in the evolutionary process.

SharePoint experts should also pay attention to managing the corporate taxonomy. For example, you may have a list of customers. If users start typing customer names willy-nilly, it may get harder and harder to find information related to a certain name. Managed taxonomies are usually included in systems to help prevent that sort of problem; for example, by requiring users to choose from a predefined list of customers instead.

That's one huge improvement in SharePoint 2010 that we did not have with previous versions – you can now enforce a system-wide taxonomy. The enterprise version of the product has further features such as the "Managed Metadata Store" that allows administrators to create hierarchical term sets for the users to pick product names from. Using the new ability to manage enterprise-level taxonomy, you then train users to use the information in those controlled taxonomies. This system ensures that when someone does a search on all sites to see what's related to a certain term, all items are returned; spelling mistakes or using different forms or abbreviations don't have a negative impact on the search.



Specifying column level permissions in a list using KWizCom List Form Extensions

3rd Party Products

Sometimes, there are things in SharePoint lists that are just not enough for what the user is trying to achieve. For example, while it is possible to set some basic validation on a column, and even to set cross column validation (for example – make sure the due date is after the start date), more complex rules are beyond the user's reach. This will discourage users who want to set dynamic default values (for example – if the user is a member of the management group, the priority column should default to "high") or to do rule based validation (validate phone numbers, emails and more). The more advanced users will be missing the ability to show different screens to different users or depending on the state of the form. For example, they would want a new form for an issues list to show the user filling up the form the title column, the description column and the priority column, but not the status column – what is the point of confusing the user by asking them what is the status of an issue they are just opening? On the other hand, when a support engineer opens the same form, they need to be able to add comments and change the status. All these feature are missing from SharePoint and users may say – "give us back our Microsoft Access!"

Which is not the response we wanted.

This is where custom 3rd party extensions to SharePoint come in. For example, the SharePoint List Form Extensions by KWizCom (www.kwizcom.com) is an extension that opens the doors for end users, allowing them to set all the rules mentioned above, and more, in the same user interface they use currently to modify the lists.

Another tool from the same company is the "SharePoint Notification Feature" which enhances the lists and allows them to send notifications to users by email for certain events in the list. For example – if an issue was closed, the user who opened the case will get an email about it.

Another example is a notification rule which sends users a reminder 3 days before their assigned task is due, or when a project milestone is about be reached.

As you can see, these kind of products extend what end users can configure in SharePoint lists, and therefore make the end users more powerful in creating useful, meaningful lists. This approach is in line with the evolutionary approach – the more flexibility we give our end users, the more likely they are to use the tools to create meaningful applications that work.

Divinity versus Darwinism

The "evolutionary approach" to information management can be scary. Instead of the IT department playing God, it has to start playing a bit more Darwin, which can lead to mistakes and evolutionary dead ends—and some applications will become extinct along the way. But I believe that whatever makes people more efficient in their work will win. If you're an IT manager, you can give power to your users to help themselves with the small things, and let your team of experts focus on the big things (the kind of applications that a simple list can't solve). Allocate a bit of time for your team to do "genetic engineering" on what the users are doing, and try to point them in a better direction, but as a whole, trust users to do the right thing.

Covering up for PCI compliance

By Lee Whincup, Business Development Manager, ReadSoft Oceania

In today's modern world, people rely on credit & debit cards to make a high percentage of their payments and purchases. These transactions can be for just about anything from grocery shopping to buying tickets on the internet, even for paying their regular bills. Consumers have become comfortable with the security their card providers offer with fraud guarantees becoming the norm.

To combat the rising levels of theft and fraud, the Payment Card Industry (PCI) created a standards group to help govern the security around the handling and storage of cardholder information. The challenge now for the CIOs of many different types of industry verticals, is how to handle large volumes of payment transactions in a PCI compliant manner, yet do so as part of a cost effective and streamlined business process.


CREDIT CARD PAYMENT FORM

Insurance Policy Number: [redacted]

VISA [x] MasterCard [ ] American Ex Date: [redacted]

Diners Club [ ]

Account No. [redacted]

Cardholder's me: [redacted] Amount of Charge $[redacted]

Billing A [redacted]

te Code: [redacted]

ture: [redacted] Date: [redacted]

REDACTED

What is PCI

The PCI Security Standards Council was launched in 2006 by a group of 5 credit card providers including American Express, MasterCard Worldwide, and Visa Inc. The standard was created to help organisations that process card payments to prevent credit card fraud through increased controls around data and its exposure to compromise.

The council is responsible for the development, management, education, and awareness of the PCI Security Standards, including: the Data Security Standard (DSS), Payment Application Data Security Standard (PA-DSS), and Pin-Entry Device (PED) Requirements.

The PCI standard has been adopted as the global framework for payment card data security.

Section 3 of the Data Security Standard revolves around the stored card data and discusses protection methods such as encryption, truncation, masking and hashing as critical components of cardholder data protection and that using these methods should be considered for risk mitigation. It goes on to suggest that where possible, it is best not to store sensitive authentication data after authorisation.

The suggestion is that the card verification number and the PIN not be stored would seem quite obvious but the standard also suggests that information such as the Primary Account Number (PAN) should at a minimum be rendered unreadable.

How can this be achieved in a concise yet cost effective way?

Captured Information – Removing the Risk

When credit card numbers are submitted via printed documents such as correspondence or fax, ReadSoft offers solutions to scan and OCR the credit card numbers as part of a digital workflow. Clients can destroy the original and work with the XML Metadata and the .tif image if necessary.

The storage of this image however can mean that if a database or archive isn't completely secure, non authorised personnel can gain access to the confidential data contained within a digitised document. For this purpose, ReadSoft has developed information redaction solutions to the various data security risks our customers face.

ReadSoft offers a solution to redact the credit card numbers when they are viewed over a network, so that only particular users have access. This can also give individuals different views of the image based upon user authentication and permissions.

Example 1 – Major Electrical Retailer

A major electrical retailer has customers who need to send in service renewal forms regularly. These forms contain credit card details including the full Primary Account Number (PAN) and the security code or CVV.

Once the service renewal forms have been captured, the information is passed on to verification officers who see different views of the image. The technology uses field categories on the form definition to indicate the security level of the user and what they can see.

A solid black area is placed over the field coordinates on the image so that one will see the credit card number with no CVV information, whilst another will see only the CVV.

Once the processing is complete, the image then has all appropriate fields overwritten by the 'Transfer' module as it is output for storage.

Similar field redactions are also being utilised for securing their cheque processing requirements.

Example 2 – Survey Company

A leading survey company had the need to keep archived customer surveys for long periods of time. By storing the documents electronically, they were still potentially exposing themselves to the risk that information contained within the surveys may fall into the wrong hands.

After examining the solutions that ReadSoft was providing its customers for ensuring PCI compliance, they decided to utilise the same technologies to remove sensitive personal information from their questionnaires. This allowed them to achieve the cost benefits of automatically capturing and processing the survey information whilst securing the long term privacy of those who undertook them.

Example 3 – Utility Provider

A utilities customer of ReadSoft's supplies energy to over 800,000 of their customers. With payments coming into them via a range of methods, a solution needed to be found that was as wide ranging as it was secure.

Not only did ReadSoft provide the ability to remove personal data from the stored image, as an additional security initiative, ReadSoft provided a specialised watermarking technology which creates a watermark stamp on the saved image containing audit and security information regarding when the processing was completed and by whom.

A brave new smartphone world

As sometimes occurs with the rapid uptake of a new technology, consideration of the risks lags behind adoption. David McGrath makes a case for being concerned about smartphone usage.

Undeniably, Smartphones, like Blackberry, iPhone and Android make valid claims as a significant new technology.

Combining exceptional interconnectivity (think wifi, wireless mobile, GPS, network etc.) slick interfaces, serious computing power and excellent portability their uptake, both personally and by business in recent years, has been nothing short of dramatic.

Clearly, smartphones are capable of storing immense amounts of both personal and business data often with sometimes surprisingly little security protecting it. The question is, are you clear about what the risks to your business information are?

It might also interest you to know that one of those risks may in fact be coming from the local constabulary.

A recent article by Joshua Engle in Law Technology News *"Courts Struggle with Police Searches of Smartphones"*, highlights an emerging conflict concerning smartphones in the United States between the police right to police to search and an individual's right to privacy.

The Fourth Amendment to the United States Constitution, which provides protections against unreasonable searches and seizures, provides that searches conducted without a warrant are per se unreasonable.

There are however some exceptions such as the 'search incident to arrest' which permits the searching of an arrested person and the area within their immediate control including possessions. The exception is justified by the need for officer safety and evidence preservation.

The US courts are currently divided over the question as to whether a smartphone should be characterised as another item, like an address book or pager, or something different like a laptop, because of their capacity to store enormous amounts of confidential personal and business information.

The bizarre outcome is that, even if you are arrested for a minor traffic offence, your smartphone including texts, photos, address book contacts and emails could end up being searched by police.

In a similar vein, another U.S article, *Michigan: Police Search Cell Phones During Traffic Stops* claims that Michigan police are now using "a high-tech mobile forensics device" that can be used to extract information from cell phones belonging to motorists stopped for minor traffic violations.

David McGrath is a Sydney-based solicitor with extensive ediscovery experience.

So, could your smartphone be searched in the same way in Australia? Well generally speaking yes. Upon arrest, police are entitled to search you and property in your possession, without a warrant. Again, the justification is evidence protection and police safety.

Of course, there are limits on search powers. Generally speaking, there must be reasonable grounds for suspecting that relevant incriminating information

is present and the search conducted should be limited to the original purpose it is being carried out for.

At court, the judge has discretion not to admit evidence which has been improperly or unlawfully obtained by police.

Ultimately however the law of search and seizure is necessarily complex. It strives to strike a balance between a public interest in law enforcement and the protection of individual rights, including privacy. The outcome will often depend on the particular factual circumstances under review.

There is little doubt however that mobile phone evidence can used to devastating effect in court proceedings, to both prove direct facts and undermine witness credibility.

For example, in *Powercor Australia Ltd v Pacific Power [1999]* VSC 110, mobile telephone records and other documents were used in cross examination to raise doubts about the accuracy of critical evidence given by two witnesses about the course of events on a particular day.

Also, in *Charmyne Palavi v Queensland Newspapers Pty Ltd& Anor [2011]* NSWSC 274, the plaintiff's defamation proceedings were dismissed after the court found that she had disposed of one iPhone and had deleted material from another, with the intention of destroying material which could have been used in the proceedings.

In *Metz Holdings Pty Ltd v Simmac Pty Ltd [2011] FCA 263*, the plaintiff secretly recorded mobile telephone conversations between himself and other parties to the litigation over a six month period.

When he attempted to put the recording into evidence, the defendant argued that the recording was illegal under the Surveillance Devices Act 1998 and should not be admitted.

The judge however found that the recording, made of a private conversation for the protection of the lawful interests of the person making the recording, was in fact permitted under the Act. The recordings, which were relevant to the plaintiff's claim of unconscionable conduct against the defendants, were duly admitted into evidence.

What About eDiscovery?

When it comes to discovery, will you be burdened with the obligation to also collect, review and disclose contents of your smartphones in addition to all the data on your network?

Again, the answer is yes, it's quite conceivable that potentially relevant information, particularly emails, stored on a company's smartphone, could be relevant to a proceeding.

For example, in *Austal Ships Pty Ltd v Incat Australia Pty Ltd [2009] FCA 368*, a Blackberry/proxy server used for communication between the Blackberry mobile phone devices and the email server and 24 Blackberry mobile phone devices were listed by the Incat's IT Manager as falling within the scope of discovery.

A sound strategy for excluding such portable devices from the discovery process is to ensure that their data is regularly synchronised with the organisation's network. In this way, it will only be necessary to search the network and ignore the smartphone devices. Similar to the case of backup tapes however, given the likely complexities and burden associated with retrieval of smartphone data, your opponent will likely have to show more than a "theoretical possibility that something might turn up" from the additional search *Slick v Westpac Banking Corporation (No 2) [2006] FCA 1712*.

Clearly however if a company allows users to hold data separate to the network in a mobile device, it leaves itself exposed to the risk that it will need to separately search these devices.

Bin Laden's Technology

Just in case you are not convinced of the risks posed by mobile technology consider the recent US operation which finally killed Osama Bin Laden. Americans were jubilant when, on 2 May this year, nearly ten years after September 11, the US finally got their man. It was reported by MSN, however that some consider that the real win was in the intelligence gathered from Bin Laden's compound# which included 10 hard drives, five computers and more than 100 storage devices.

The thousands of documents recovered, both hardcopy and electronic, have been described by US officials as the "most significant amount of intelligence ever collected from a senior terrorist" revealing a series of planned threats including hijacking and blowing up oil tankers.

Although heavily reliant on technology, it was clear that Bin Laden was aware of the associated risks and took measures to mitigate them. There were no land lines or internet connections at the compound. There was no evidence that he personally used a mobile.

Five mobile phones were however used by his aides. Interception of phone calls from these five mobiles by US intelligence combined with overheard stallite imagery, gave the US a clear picture of daily life at the compound which was invaluable in planning the raid.

Just as the use of mobile technology was critical to Bin Laden's operations it also contributed to his downfall and will assist his enemies to continue to attack Al-Qaeda.

Clearly, technology is a double-edged sword.

ZyLAB answers ediscovery audio challenge

ZyLAB claims to have solved the challenge of searching audio clips for ediscovery with its new Audio Search Bundle.

It promises to provide technical and non-technical users involved in legal disputes, forensics, law enforcement, and lawful data interception with the ability to search, review and analyse audio data with the same ease as more traditional forms of Electronically Stored Information (ESI).

"For the Enron case, nearly a dozen FBI analysts spent 3 months transcribing 2,800 hours of audio so they could search for key phrases in the transcript," recalls Johannes C. Scholtes, chairman and chief strategy officer for ZyLAB.

"With the ZyLAB Audio Search Bundle available today, they could perform those same searches directly on the audio files - not a speech-to-text transcript - within about 5 minutes and instantly replay the segments to verify their relevance."

Written text, such as transcripts from audio recordings, cannot fully convey intent, nuance or emotion which are only discernable by human listeners. Additionally, speech-to-text technology is generally limited to dictionary entries. In contrast, the ZyLAB Audio Search Bundle transforms audio recordings into a phonetic representation of the way in which words are pronounced so that investigators can search for dictionary terms, but also proper names, company names, or brands without the need to "re-ingest" the data.

With the ZyLAB Audio Search Bundle, forensic investigators and lawyers can identify and collect audio recordings from various sources with far greater efficiency and effectiveness than was ever possible with manual processing.

The software supports multiple search techniques simultaneously, such as Boolean and wildcard, leading to greater accuracy and relevance of results. The fast, iterative search helps to reduce the size of the data set and the costs for review.

"Salient evidence is just as likely to be found in audio files as it is in email," continued Scholtes.

"Now a legal reviewer can open a folder of audio files, type in a query, and click on the result list to listen to the search hits in context. Finding evidence in audio files is as simple as finding a song on iTunes."

The ZyLAB Audio Search Bundle supports all industry-standard audio formats, including G711, GSM6.10, MP3 and WMA, as well as the audio component of video files.

Smartphone forensics

US computer forensics provider Susteen is promising one-click mobile and Smartphone forensics with its new Secure View 3 product. t promises a better way to create evidence reports by allowing users to bookmark data for fast processing to streamline the investigation process.

Secure View 3 provides for SMS/MMS/E-mail acquisition from smartphones, as well as the ability to extract web browsing social network activity from Facebook, Twitter, and MySpace.

All data types are integrated in the Time Line Analysis tool to offer a snapshot of all activities (SMS, email, call history, web browsing, social networks) by hours, days or months.

Hiroyuki Maruyama, President and CEO of Susteen, said, "Phones are like computers now – Internet, email, document creation right at consumers' fingertips wherever they are. There are millions of people using their cell phones as their sole computing device.

"How would an investigator create a report containing all the data from a computer? Not a chance. Ability to subtract the right information is instrumental to creating meaningful evidence reports.

"This is where Secure View 3 excels in the area of mobile forensics – endows users with comprehensive tools for acquiring, analyzing, processing and reporting mobile phone data."

Kodak adds new pair of SharePoint capture tools

Kodak is adding two new scan and workflow solutions for SharePoint, KODAK Document Viewer and KODAK Scan and View software, for document-driven workflows such as invoice processing, contract management or admitting new employees.

Document Viewer embeds an inline document preview function directly within SharePoint. A visual search function provides full document previews within search results on SharePoint.

It can then display document previews in either thumbnail or full page format and users may zoom in and out or fit the document to the width of screen. Document previews do not require a wait for the entire document to be transmitted, and more than 300 file types are vieweable without the native application.

KODAK Scan and View Software supports document scanning and image enhancement directly within SharePoint.

It extends the Document Viewer Software through additional capabilities such as an enhanced search function and collaboration and workflow tools to enable users to annotate, stamp and highlight specific documents.

Single-click tools will be provided that rearrange and remove pages, and split and merge documents. Users can edit and enhance documents in SharePoint environments with tools such as border removal, page de-skewing, and image cleanup.

Brother hits out with new MFPs

Brother International (Aust) has added seven new models to its line of Monochrome Laser Multi-Functional Products (MFPs) for the home office and SMB market.

Many offer Automatic Double-Sided Printing (Duplex) mode to reduce paper usage and include faxing, copying and scanning abilities.

They also offer the N-in-One printing and copying function, allowing users to reduce multiple pages into a single A4 sheet.

Taking savings even further, users can either make use of Brother's Toner Save Mode, or opt for the non-compulsory high-yield toner to push the cost per print to an all-time low (selected models only).

All seven monochrome Laser MFC printers are equipped with high printing speed of up to 26 pages per minute (ppm) and are bundled with the NUANCE Paperport (for Windows) and NewSoft Presto!PageManager (for Mac, supplied via web download)."

Pricing starts at $A229.

Federating search for SharePoint

Enth, a US developer of a database search engine, has announced the availability of the a Federated Search Connector for Microsoft SharePoint.

The Connector integrates results from the Enth database search engine with search results generated by SharePoint to reduce the time, effort and cost of developing and running business reports.

Traditional search engines are able to crawl, index and quickly find unstructured content found on web pages, within documents, spreadsheets, presentations, PDF files and even within emails. However, many organisations have significantly more information stored in relational databases that cannot be accessed by traditional search engines.

Enth unlocks this content by enabling relational databases to be searched using plain text. Enth dynamically generates optimised SQL to quickly retrieve data from one or more databases in response to a search request. Enth can find information up to 90% faster than using business reporting software and can reduce report development expenses by as much as 80%.

"While business reporting software has made progress in usability, the reality is that it's still too complex for many users," said John Grace, CEO of Enth.

"Users are required to learn a unique software application, often must sort through long lists of reports to find the right one, and if they can't find an existing report, users need to know which database has the required information they are looking for and then write a new, custom report. With Enth, users just type in their request and press search!

"No need to start a software application, find a report or write something custom. Enth makes finding information as fast and easy as using a traditional search tool."

Users registered at Enth.com can also specify public feeds that they would like have to included in their SharePoint search results. For example, a marketing manager may want to see public demographic and unemployment data for a region when looking at private regional sales data.

Or, a police administrator may need historical crime trend data while planning future resource needs. Or, a political campaign manager may want to see postcodes in which fund raising is less than a competitor.

Nintex unveils Analytics 2010

Nintex has unveiled an updated version of its product line that helps report and analyse trends, performance and usage of SharePoint 2010 environment.

Nintex Analytics 2010 was released at the SharePoint Best Practices Conference in London.

Mike Fitzmaurice, Nintex's Vice President of Technology, said "Nintex Analytics 2010 is a window into SharePoint adoption, governance, workplace collaboration, content lifecycle and system utilisation".

Due for release on May 10, 2011 Nintex Analytics will include a browser based report designer that is able to be customised, as well as subscription options that will allow users to have reports and data sent to their inbox.

Out of the box there will be reports for documents, lists & discussions, sites, users, activity, search, performance, storage, as well as dashboards targeted to different types of users, such as system administrators or content owners.

"Nintex Analytics 2010 takes full advantage of the SharePoint 2010 user experience, offers rich reports, and provides the answers about your SharePoint environment," said Fitzmaurice.

Nintex Reporting 2008 users with software assurance agreements will be able to upgrade to Nintex Analytics 2010 at no charge.

A 30 day trial will be available for download.

Perceptive launches ECM for Microsoft Dynamics AX

Lexmark subsidiary Perceptive Software has announced an enterprise content management (ECM) solution for Microsoft Dynamics AX.

Perceptive ImageNow provides the ability to associate various file types and images to specific transactions and to retrieve the file or document image at the transaction/line item level from within the ERP software.

Perceptive's Interact for Microsoft Dynamics AX is available for the financial management modules including general ledger, accounts payable and receivable, and fixed assets. ImageNow document management, imaging and workflow technology integrates with Microsoft Dynamics ERP solutions to instantly deliver secure, digital versions of paper and electronic documents associated with daily business routines.

"Perceptive Software's partnership with Microsoft has grown consistently over the past decade, always with the goal of bringing value to the end user community. Our collaboration with Microsoft to provide Microsoft Dynamics AX community the ability to work within their familiar environment while leveraging the robust capabilities of ImageNow broadens and deepens our relationship and brings even more value to the customer," said Dennis Cunningham, Vice President of Global Alliances and Programs, Perceptive Software.

"With this partnership, users of Microsoft Dynamics AX can transform the way they manage content, become much more efficient and get a faster return on their technology investment."

Redaction for the enterprise

Informative Graphics has announced the launch of two new solutions: Redact-It Enterprise and Net-It Enterprise for Microsoft SharePoint 2010.

Redact-It Enterprise (RIE) for SharePoint 2010 completely removes sensitive content from electronic documents for safe, efficient distribution to courts, the media, customers, vendors or any other audience not authorised to see the complete content.

Built to leverage the Microsoft SharePoint 2010 platform, RIE can be integrated into an automated workflow process or can redact content across entire SharePoint libraries.

IGC's rich redaction technology can search for text or patterns like Tax File numbers or phone numbers, or it can apply a template to redact specific areas or zones on forms. The easy-to-use interface works with virtually any format and creates a PDF, TIFF or CSF (Content Secure Format) rendition of the redacted file, leaving the original document untouched. RIE assists in regulatory compliance and ensures alignment with privacy policies.

Net-It Enterprise (NIE) for SharePoint 2010 converts documents to PDF, TIFF, or CSF for archiving or sharing read-only versions. NIE can publish selected pages of a document or add banners and watermarks to a document for tracking purposes. Build Net-It into your SharePoint workflows, have it monitor a SharePoint library for new documents to publish, or configure it so it will publish based on SharePoint metadata.

NIE eliminates cumbersome document conversion and publishing by automating the entire process. It can be used out-of-the-box in SharePoint or integrated into other SharePoint-based solutions. Net-It lets you publish an accurate reproduction of your original documents and assists with internal records management policies.

Semantic toolkit for SharePoint

Access Innovations has announced that its Data Harmony suite of content enrichment and thesaurus management tools can now be fully integrated with Microsoft SharePoint 2010.

Data Harmony fills semantic gaps in SharePoint to help users take full advantage of their metadata through auto classification, enterprise taxonomy management, entity extraction, and search enhancements. The end result is information assets that are more searchable and more accessible.

"While SharePoint 2010 enables basic importing of an external taxonomy file and some ongoing management, it lacks a truly useful taxonomy management tool. By integrating SharePoint with Data Harmony's MAIstro products, users can easily create and manage a robust taxonomy that offers extensive subject metadata with document contributor access, immediate and accurate term suggestions for efficient tagging, expanded search through semantic associations and collaboration through discovered metadata," said Margie Hlava, president of Access Innovations.

Hlava added, "By combining SharePoint with Data Harmony, an organisation can organise its information more accurately, making it easier to file and share that information, locate and retrieve that information, and collaborate with colleagues.

"As the information in SharePoint is tagged by adding controlled subject keywords, the content becomes much more valuable to a company and its users. The system is then truly collaborative by allowing reuse of earlier findings, saving staff time – which is money – and ensuring positive growth for the organisation."

MAIstro combines taxonomy and thesaurus construction and management with automatic machine aided indexing to produce indexing that can be more than 90 percent accurate and that enables browsing by subject, query auto-completion, broader terms, narrower terms and related terms. Automatic completion of thoughts as staff members type is also supported by the taxonomy tools, Hlava said.

Under the integrated system, an Event Handler sends the document being uploaded to SharePoint to the Data Harmony server first.

Documents can be sent to the Data Harmony server in full text, all MS Office formats, HTML, PDF formats or other data feeds.

From there, the Data Harmony server attaches indexing terms and other desired metadata using Machine Aided Indexer (M.A.I.) in combination with a metadata and entity extractor, with Thesaurus Master hosting the client taxonomy. The indexed document is then uploaded to Microsoft SharePoint Server 2010. Search can be done using the MS SharePoint Search, FAST Search or other search software such as Perfect Search.

Integrating Data Harmony with SharePoint 2010 can help users continually add to and revise their taxonomy, reuse and download their taxonomy as needed and implement their taxonomy on the search side of their website.

In addition, the taxonomy created through the integration of SharePoint with Data Harmony follows the ANSI/NISO Z39.19 standard for taxonomy construction and the comparable international standards.

Data Harmony can also integrate with other systems, such as those of OpenText, EMC Documentum, and MarkLogic, as well as SharePoint 2007, to support an enterprise-wide taxonomy strategy.

Konica Minolta adds new MFDs

A new series of multifunctional device (MFD) that combine monochrome printing, faxing and copying capabilities with colour scanning, have been announced by Konica Minolta, the bizhub 552 and bizhub 652.

"The bizhub 552 and bizhub 652 combine colour scanning capabilities of up to 78 hard originals per minute with high monochrome output speeds of 55 (bizhub 552) or 65 (bizhub 652) pages per minute.

Finishing options range from simple stapling up to 80-page booklets with colour cover insertion. The new bizhubs carry up to 6,650 sheets of paper with a maximum weight of 300 gsm. Up to six paper inputs can serve different workgroups for their special needs. Supported paper sizes range from A6 to A3 plus custom sizes.

Idera unveils SharePoint diagnostic manager v2.5

Idera has announced SharePoint diagnostic manager 2.5 to provide real-time performance monitoring, analysis and alerting of SharePoint farms and servers from a single console.

It provides insight into SQL Server, including configuration options and database fragmentation, showing how databases are allocated across drives and allowing capacity planning to be performed using data and log file growth trends.

SharePoint diagnostic manager enables users to acknowledge and clear ongoing alerts, or disable an alert forever.

"SharePoint touches many areas in an organisation making peak performance a priority and also making it difficult at times to pinpoint what might be causing performance issues," said Rick Pleczko, President and CEO of Idera.

"SharePoint diagnostic manager's expanded ability to monitor SQL Server helps administrators find the sluggish databases or configuration issues that are causing poor SharePoint performance. Also, the new version allows users to personalise what issues they are alerted to - based on their organisations' standards and preferences."

Idera's SharePoint diagnostic manager is available at $US995 per server.

SharePoint governance tool

Axceler is promising expanded SharePoint policy enforcement capabilities are achievable with ControlPoint 4.2, the latest version of the SharePoint governance software.

"ControlPoint helps companies with their SharePoint governance by giving them powerful capabilities to analyse, report, and manage their SharePoint deployments.

"ControlPoint 4.2 goes one step further by bringing more interactive and engaging SharePoint reporting based on Microsoft Silverlight," said Michael Alden, President and CEO, Axceler.

"With this release, Axceler gives even more control to SharePoint managers as a critical part of a SharePoint governance plan."

New reporting capabilities based on Silverlight include the ability to manipulate report data, create custom views and generate graphical and tabbed reports.

It offers analysis of SharePoint 2010 Managed Meta Data usage in lists/libraries, and policies to intercept user actions like creating content so managers can prevent them before they happen. There are also enhancements for permissions and security including support for claims-based authentication.

Central management for Outlook signatures

A new tool to centrally manage users' Outlook email signatures has been launched by US company Red Earth Software, Policy Patrol Signatures for Microsoft Outlook.

It allows organisations to ensure that the necessary email disclaimer is added and that corporate email signatures are uniform and convey consistent and professional brand practices.

"Companies are moving to standardised email signatures for company branding purposes, as well as adding the required legal disclaimers to meet compliance requirements," said Mike Spykerman, CEO of Red Earth Software.

"Outlook signatures are difficult to manage since they require configuration for each individual client and there is no way to manage these signatures from a centralised location. By deploying Policy Patrol Signatures, companies can now configure their user's Outlook signatures from one location ensuring a homogeneous corporate email 'look'."

IT administrators can easily control email message fonts, format pictures on the signature, add company legal disclaimers and footers and utilise different signatures for replies and forwards. Policy Patrol Signatures integrates with Microsoft Outlook 2003, 2007 and 2010 and Outlook Web Access Signatures.

"Companies are becoming increasingly aware of how their email signatures not only increase brand awareness but also help market their business. By including a professionally designed signature block with a company logo, the sender conveys a consistently branded professional image. Additionally, including social media links in email signatures acts as a catalyst for building followers on social media sites such as Twitter and Facebook," added Spykerman.

A 30-day trial version is available from http://www.policypatrol.com

Open season on PST files

Encryptomatic has announced the release of Pst Viewer Pro 4.5, a Windows app for accessing email content stored in Outlook .pst files. In addition, Pst Viewer Pro can also display .MSG, .EML and .OST files. Pst Viewer Pro displays email messages formatted in text, HTML or rich text format. It allows users to reply to messages using their default email client, search emails, and batch convert emails to different formats, including PDF, GIF, TIF, HTML, MHT, Text, BMP or PNG.

Pst Viewer Pro's PDF processing allows for the conversion or inclusion of email file attachments within the PST file. Resulting PDF files are searchable, making it a solution for email archiving preparation.

Nuxeo launches Google Search Appliance plug-in

Nuxeo has announced a Connector that enables Google Search Appliance (GSA) to index and search Nuxeo Document Management (DM) content. Organisations using Google Search Appliance for Enterprise Search and Nuxeo for ECM will now be able to quickly add Nuxeo DM to their collection of enterprise data resources for a federated search.

Nuxeo DM content will appear in the enterprise search results in the same interface as other data sources indexed by the Google Search Appliance, offering a unified enterprise search experience with diverse information sources, including one or more Nuxeo applications.

The Nuxeo GSA Connector, to be deployed within Nuxeo DM, includes:

- A Google Enterprise Connector Manager, so the Google Search Appliance can search and serve documents stored in the Nuxeo Content Repository, and

• A Google Search Appliance connector type for Nuxeo, to configure the connection and define the content to index.

The Nuxeo GSA Connector is available on the Nuxeo Marketplace. Nuxeo Connect subscribers can download and install it directly in Nuxeo DM via the in-product Update Center. Non-Connect subscribers can sign up for a free trial, offering access to the full range of plugins and packages available in the Nuxeo Marketplace. The source code is open and available under the LGPL license.

Bluebeam designs PDF/A future

Bluebeam has added PDF/A Archival Compatibility and AutoCAD and Revit 2012 support to its newly-launched tool to streamline PDF-based paperless workflows for the design and construction industry, PDF Revu 9.2.

"User feedback remains a priority for us in developing the PDF workflow tools that optimise productivity and usability," said Bluebeam Software VP of Engineering Don Jacob. "With Revu 9.2, we've incorporated new suggestions and requests to expand Revu's functionality, giving architects and designers a complete package for greater efficiency, collaboration and future-proof documentation."

To support long-term archival of PDF documents, Revu 9.2 now offers the ability to save files according to the PDF/A specification. PDF/A is an International Standards Organization (ISO) defined specification for electronic document storage that embeds all content, including text, raster images and vector graphics, fonts and colour information, within the file to provide for exact duplication for years to come.

This archival compatibility ensures that all markups and edits made to PDF project drawings in Revu will be preserved in perpetuity for future reference, eliminating file format incompatibilities that often prevent retrieval and efficient use of historical project documents.

For Revu CAD and Revu eXtreme users, version 9.2 also extends Bluebeam's PDF plug-in capabilities for one button and batch PDF creation to AutoCAD 2012 and Revit 2012. In addition, Revu 9.2 Standard, CAD and eXtreme are available in updated localised versions of Swedish and German with new localised versions added for Spanish, Danish, Norwegian and Finnish.

Bluebeam also includes several new features added this March with the release of Revu 9. New 3D PDF viewing capabilities enable users to navigate through complex models on screen and rotate, spin and zoom to gain a dynamic view of the project. Using just a mouse, users can refine their perspective and vantage point, as well as isolate and view various specific elements, make transparent layers to drill down into masked details and even save these specific views in the document so that project collaborators can have the same perspective.

The VisualSearch function allows users to search for a specific visual element or symbol across the current document, all open documents, recent documents or files in a specific folder, and even instantly apply markups and hyperlinks simultaneously to all identified VisualSearch results. The highly-requested area cutouts feature in the measurements tool enables architects and designers to account for and provide detailed measurement specifications for room obstructions. PDF to MS Office functionality makes it easy to seamlessly convert PDF files back to their original native MS Office file formats with export capability to Word, Excel and PowerPoint.

Finally, the new Bluebeam PDF Revu eXtreme provides advanced tools for PDF power users including PDF forms creation, Optical Character Recognition (OCR) for transforming scanned PDFs into text searchable and selectable files, powerful scripting tools for automating multi-step processes and redaction for permanently removing sensitive text and images from PDFs.

Revu 9 was recently recognized during its Australian debut at designEX with a Sustainability Award for providing architects with an easy-to-use solution to digitise project workflows and go paperless.

Canon unveils eCopy v5

Canon Australia has announced the new release of its scanning and workflow solution, eCopy v5, used in tandem with imageRUNNER ADVANCE multifunction printers (MFPs) to automate repeatable business activities.

"Canon Australia has a long standing relationship with eCopy, selling it successfully for over 9 years. Version 5 enables businesses to greatly reduce the cost of capturing and managing paper by offering the ability to tackle paper forms processing directly from the MFP," said Luke Maddison, Senior Product Manager-Software, Canon Australia.

"Its other strength is its vast array of connectors and extenders which enable information to be integrated to business applications, simplifying the scanning process making it easier, faster and more valuable."

eCopy v5 key features include:

• Automatic data extraction from paper-based forms and processing directly into back-end systems via the eCopy Forms Processing Extender, with unlimited page-processing;

• An enhanced eCopy Document Conversion Extender, with OmniPage OCR that increases accuracy and allows users to convert paper into fully-formatted Microsoft Word and Excel documents, as well as searchable PDF files, and have them delivered to the desktop or back-end application directly from the imageRUNNER ADVANCE device panel;

• Customisable, intuitive user interface with personal scanning profiles that follow users from device to device via authentication;

• Advanced document routing capabilities utilising the improved Quick Connect and Barcode Routing Extender; and

• New eCopy PDF Pro Office desktop software with scan-to-desktop InBox and direct connectivity to content management systems, including Microsoft SharePoint and EMC Documentum.

Nuance intros eCopy PDF Pro Office

Nuance has released new bundle of document imaging software, eCopy PDF Pro Office, designed as a companion to eCopy ShareScan or as a stand-alone PDF software tool.The bundle includes OmniPage, PaperPort, PDF Converter Professional, and the ShareScan family of products, providing capabilities to create, convert, and collaborate on business documents.

Scanned paper, PDF and Microsoft Office documents can be combined into a single PDF, with annotation tools to add notes, stamps and comments, to PDF documents. The Comment Panel enables users to view, organise, prioritise and update comments.

For industries where document conversion accuracy is essential – such as the legal profession - eCopy PDF Pro Office enables users to compare and review two documents side by side. eCopy PDF Pro Office enables users to control viewing, printing and modifications by adding passwords with secure encryption and permission controls to PDF documents. Users also have the option to flatten information in a document to protect sensitive information during file sharing or archival. Words can be automatically found in the scanned document and marked with redaction (black-out) highlights, underlines or cross-out.

A 45-day trial version is available for download.

Canon intros compact MFP

Canon Australia has released its imageRUNNER C1028iF multifunction printer (MFP) aimed at small medium business (SMB) and enterprise workgroups.

With the ability to communicate with Canon's uniFLOW application, the imageRUNNER C1028iF provides a log-in feature for device access control, client billing codes for advanced cost control and universal secure print for security and reducing print waste.

The user can search for email addresses and fax numbers via the LDAP server. This enhances device efficiency and productivity as the address book can be centrally managed and easily accessed locally

For enhanced productivity the device automatically substitutes to paper of an available size if the print job specified paper is not available (A4/Letter only).

A new feature allows users to copy the front and back side of an ID card or Business Card onto a single page.

Social media enters the Vault

Symantec has announced its updated Enterprise Vault 10 software, due out in the second half of 2010, will add new integration with the company's data loss prevention (DLP) and encryption technologies to automate governance processes.

Symantec says Enterprise Vault 10 will provide tools to automatically archive social media interactions for compliance, eDiscovery or corporate governance purposes.

The Data Classification Service (DCS) is a new feature that will leverage Symantec' DLP technology to analyse email content and metadata. This can automatically classify the email and assign the appropriate archiving and retention policy for that message or flag it to be reviewed for compliance reasons.

Classifications will also be able to be used as filters to speed up the search and review process for eDiscovery.

Symantec is adding the ability for organisations to discover data stored in the cloud and from social networks. Symantec's Software-as-a-Service-based Enterprise Vault.cloud will offer unlimited cloud storage for e-mail, with rapid search and access, for a flat fee per mailbox per month.

"Information streams are evolving from email to social networks and archives are moving from on-premise to the cloud, causing IT administrators to lose sleep over managing information and lawyers to debate new retention policies," said Brian Dye, Vice President of Product Management, Symantec.

"Symantec Enterprise Vault and Enterprise Vault.cloud removes the stress from IT and legal users with its best of breed archiving technology to allow greater control and visibility into the archives to reduce eDiscovery costs."

ShadowProtect delivers Granular Recovery for Exchange

StorageCraft has launched a new solution for backing up, restoring, searching or migrating Exchange database (EDB) files.

ShadowProtect Granular Recovery for Exchange complements ShadowProtect Server and ShadowProtect Small Business Server, which provide point-in-time backup images of an Exchange server. With those existing images, IT administrators can simply use ShadowProtect Granular Recovery for Exchange to access the Exchange EDB backup file contained in the backup image, navigate to the desired email files – whether it's entire mailboxes, individual email messages, or email attachments – then drag and drop the needed files to a production Exchange server or save them to a PST file.

Greg Wyman, Vice President Asia Pacific for StorageCraft, said: "Microsoft Exchange is one of the most popular email servers for companies of all sizes but it's also complex, which sometimes makes it difficult to recover and restore individual mailboxes and email messages. ShadowProtect Granular Recovery for Exchange takes the guesswork out of that process, restoring critical data within minutes instead of hours or days."

Features of the release include:

• Rapid restore of deleted email: Find and restore a single email in minutes, eliminating the need for a comprehensive restore of an entire server to recover a few missing files.

• Rapid recovery of specific mailboxes: Expedite the recovery of a single mailbox or specific groups of mailboxes without requiring an entire database recovery, saving time and money.

• Swift search of email archives: Search email messages and attachment file name by key word, subject, sender, recipient, or send date. An optional add-on allows even more in-depth search with the ability to scan attachment contents.

• Easy migration to a new Exchange server: Drag-and-drop user mailboxes to the new Exchange server once it's online, minimising migration time.

The new version of ShadowProtect Granular Recovery for Exchange, which has an available trial version, also supports Exchange 2010.

Google spreadsheets pivot

Google has introduced pivot tables in Google Spreadsheets, allowing users to quickly narrow down large data sets to get high level insights.

The feature allows you to "pivot" or rotate data, thus looking at it from different angles and seeing a variety of patterns which may not be immediately obvious.

The new feature was announced at the Google Docs blog by Software Engineer Matt Ziegelbaum, who also notes that "pivot tables from Microsoft Excel can't be uploaded to Google spreadsheets at this time."

System recovery on a stick

Symantec has announced new recovery updates and platform support for its System Recovery 2011 product, formerly known as Backup Exec System Recovery, for both physical and virtual environments.

Symantec System Recovery promises to provide complete recovery in minutes, even to dissimilar hardware, bare metal, remote locations or virtual environments, to minimise business downtime.

Amit Walia, Vice President of Product Management, Symantec, said, "Symantec System Recovery shortens the recovery time window with new features such as the ability to transform a USB device into a recovery disk and additional flexibility to the customisable recovery disk wizard."

Symantec's 2011 SMB Disaster Preparedness Survey found that the majority of small businesses surveyed are still unprepared to deal with a disaster.

Similarly, Symantec's 2010 Disaster Recovery Survey, which surveyed enterprise organisations, found that the time required to recover from an outage is twice as long as respondents perceive it to be.

System Recovery 2011 is a scalable solution designed to centrally manage large numbers of clients from a single management server. The Symantec System Recovery Management solution can now be installed to and hosted on Windows Server 2008 R2 64-bit environments

Additional flexibility has been added to the customisable recovery disk wizard with the option to select an ISO image as the source for a custom recovery disk.

Axceler reins in fileshare chaos

Axceler has introduced FileLoader for SharePoint 2010, a new product designed to migrate files originally stored in Windows file shares. The company claims it delivers many of the benefits of SharePoint to Windows file shares, including: one standard platform for sharing files, improved version control, workflow capabilities, document retention abilities, improved search results, tighter security, and better access control.

"Many enterprises are seeking the benefits of SharePoint 2010 but have large amounts of content stored in Windows file shares without any sense of organisation or structure," said Michael Alden, President and CEO, Axceler.

"One of the most common reasons companies delay a migration to SharePoint 2010 is because of the need to move key content from file shares that may have been around a long time. Enterprises also ask for the ability to analyse and structure this content to work with the new Managed Metadata Service capabilities of SharePoint 2010, and we are excited to expedite the migration to SharePoint 2010 with this product."

FileLoader offers the ability to create Microsoft Excel ˜control files' that represent the file shares, allowing administrators and users to work together to clean up their file shares and apply metadata. It means managers can reorganise folder structures and distribute responsibility of content to stakeholders who know the content best.

Axceler FileLoader for SharePoint 2010 has the flexibility to support all three common approaches to moving file share data to SP 2010. These include: 1) moving file shares to SharePoint as-is and maintaining the file structure; 2) reorganising the content manually and pushing it to a new SharePoint layout; or 3) migrating iteratively, which allows the clean up, sorting, and transformation of the data to be performed on a user-defined schedule.

Alfresco integrates Activiti BPM

Alfresco has launched a preview of the Activiti Business Process Management (BPM) workflow engine integrated with its ECM platform.

The Activiti integration extends Alfresco's workflow features by providing developers more flexibility and integration capabilities for process flows between Alfresco and other business applications. The integration is being offered through an update to Alfresco Community, version 3.4.e and is available for immediate download.

"The replacement of jBPM with Activiti in Alfresco is just the beginning. It's the start of a seamless integrated environment that combines Enterprise Content Management (ECM), Adaptive Case Management (ACM) and Business Process Management (BPM)," said Tom Baeyens, Activiti Project Lead.

"Moving forward, our new case management vision will focus on taking BPM out of its niche and opening it up to a much wider audience, fostering an environment for even greater innovation."

Activiti is a lightweight workflow and Business Process Management (BPM) Platform targeted at business people, developers and system administrators.

This preview release will enable early adopters to compare the existing jBPM workflow with the Activiti BPM environment while at the same time start experimenting with the integration into other tools to create different types of workflow applications.

The production ready version of this integration will be delivered in the next major release of Alfresco Enterprise later this year in Q4 2011.

StorageCraft delivers virtual DR

StorageCraft has launched a new tool, ShadowProtect Virtual, that allows the user to backup systems and data on any Windows system and recover it to any kind of environment: a virtual machine, physical hardware, or in the cloud.

"ShadowProtect Virtual offers the flexibility needed to maximise existing IT resources - with options for recovery to the same system, another virtual machine or even a different hypervisor - ensuring limitless business continuity," said Greg Wyman, Vice President Asia Pacific at StorageCraft.

ShadowProtect Hardware Independent Restore (HIR) technology is agnostic to the physical hardware or virtualisation platform. Instead of licences priced per host or per socket, ShadowProtect Virtual licenses feature pricing per virtual machine (VM), to allow versatile deployment wherever needed in a hybrid environment.

ShadowProtect Virtual includes support for VMware, Microsoft Hyper-V, Citrix XenServer, and Oracle VirtualBox.

Pricing starts from $A1295/$NZ1762 for a 6 Virtual Server License.

Inside SharePoint workflow

VirtoSoftware has released a new version of Virto Workflow Monitor - a web part for monitoring active workflows in Microsoft SharePoint.

Compatible with both SharePoint 2007 and SharePoint 2010, it allows administrators to be fully informed on all running workflows as well as related issues and errors.

The new version of the web part provides SharePoint administrators with additional tools for searching and filtering workflows, reporting and workflow management.

Although standard Microsoft SharePoint-based solutions include dozens of interrelated workflows, more complex solutions will require hundreds and even thousands of workflows. In such a case, the administrator's major task is to provide stable functioning of all the workflows.

Using the standard SharePoint tools only, in order for the administrator to check statuses of some processes, the administrator will have to open each of them manually.

Virto Workflow Monitor:

- displays all the workflows running on a site;
- provides information about their source lists and items;
- quickly switch between the list view and a workflow details view;
- generates a number of workflow related reports; and
- provides administrator with effective tools for workflow and data management such as sorting, filtering and group operations.

The new version of the web part adds additional search and filtering tools.

These are designed to allow administrators to quickly find workflows with a particular status within a site or site collection, manually or automatically restart all the cancelled workflows, and receive a variety of workflow status graphical reports.

People On The Move

StorageCraft Asia Pacific has appointed **Noel Allnutt** as Sales Manager, Australia and New Zealand, to spearhead a drive into enterprise markets.

Noel was formerly with distributor Westcon, looking after enterprise solutions vendor F5 and pushing their technology through channel partners that included large systems integrators, mid-tier partners and niche security specialists.

StorageCraft Asia Pacific Vice President, Richard Giddey, said: "With Noel on board we are launching a major push for more mid-market to enterprise accounts. This will place more emphasis on the high end of our traditional focus. Already StorageCraft has acquired more than 30,000 customers in Australia and New Zealand, in just over four years."

Resolve has announced the appointment of **Chris Morison** as the company's Chief Executive Officer, after more than 18 years' experience in management and business development roles across the ICT industry. He has held a variety of senior roles and executive positions at a number of organisations, including HP, Siebel, UCMS and Exigen.

Resolve - an Australian owned and operated global provider of workflow management solutions – has recently signed a number of key clients, including the Telecommunications Industry Ombudsman and the Office of the Australian Information Commissioner.

Richard Outten has been appointed as General Manager of Software, **HP South Pacific**, encompassing Enterprise IT Management, Information Management, Business Intelligence, Enterprise Security, Risk Intelligence and Software Services.

Outten joined HP in 2007 following the acquisition of Mercury Interactive. His previous experience includes a range of senior roles at PeopleSoft, Digital Equipment Corporation and IBM.

SolveIT Software, a provider of enterprise software for supply & demand optimisation and predictive modelling, has appointed **James Balzary** as the company's Director of Resources.

James is a qualified geologist with over 15 years experience in multi-commodity mining production environments and enterprise business development roles. With a global focus, James will drive the growth of SolveIT Software into the resources industry, focusing first on major mining, oil and gas hubs with the establishment of offices in Perth and Brisbane.

"SolveIT Software is rapidly and successfully applying their leading edge technology to complex supply and demand chain problems in mining and oil and gas. We are extending our product capability than previously thought possible, by unifying in-situ reserves with outbound logistics," said James Balzary, Director of Resources at SolveIT Software. "This is an exciting and high growth area, and I look forward to expanding our relationships with leading mining, and oil and gas companies in the coming months."

Prior to joining SolveIT Software, James was the Asia Pacific Director of Mining Sales for Mincom

Kiandra IT has appointed **Phillip Healey** to the role of Business Development Manager - Custom Software.

Based in Melbourne, Phillip has experience spanning two decades in the IT industry, predominantly in custom developed software solutions sales and consulting for Tier 1, mid-market and Government.

Most recently Phillip was a Principal Consultant at Pitcher Partners, leading a team of developers in providing Microsoft based solutions for clients on SharePoint, Silverlight, MSSQL and SQL reporting services, BCS, FAST Search Server and ASP.net custom software solutions.

In his many years in local Government he has also held various Ministerial appointments as well as being Mayor of the City of Boroondara where he is currently the Chair of the Urban Planning Special committee as well as the Councillor for Studley Ward.

EVENT DIARY

OBS Breakfast SharePoint Seminars

Brisbane 7th June, Adelaide 8th June, Melbourne 14th June, Sydney 15th June

This session will be run by Ben Shapiro, General Manager OBS Cloud and Managed Services and Mark Rhodes, Senior Consultant. In this session, OBS looks at common and best practices in running business critical SharePoint environments. What are the common pitfalls, what staff and skills are required, how do other organisations manage their SharePoint environment? We will also look at alternative delivery models, cloud computing and managed services; examining the advantages and disadvantages of each.

The purpose of this session is to highlight best practices on measuring how SharePoint is being used within your organisation and how this translates to effective governance strategies. The session will highlight what SharePoint provides out of the box and what is possible using 3rd party components.

www.obs.com.au

Disaster Recovery Training Courses and Workshops

Melbourne 23 June, Brisbane 28 July, Sydney 11 August, Canberra 25 August

Knowing the obstacles and how to overcome them

Scoping the Business Continuity / Disaster Recovery Plan

Crisis management planning

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Tel: (02) 9212 0300 Web: http://www.mrose.com.au/disaster-recovery-training.htm

KM Australia - Asia Pacific Congress 2011

July 18-21, 2011, Crystal Palace Luna Park, Sydney

This year's event will address a range of crucial issues associated with getting a group of people to work together on how to solve common problems, effectively retain existing knowledge and enhance learning and innovation.

www.kmaustralia.com

Implementing Information Infrastructure Symposium (IIIS)

August 2-3, Sydney

Representatives from Cisco, Dell, EMC, HDS, HP, IBM, NetApp and Symantec will participate in a "Presidential" style debate with a counterpart, moderated by analyst Dr Kevin McIsaac from IBRS, who will review each presentation with audience participation by questions and vote.

www.snia.org.au

Visual Business Intelligence Workshop
15-17 Nov - Bayview Eden Hotel, Melbourne
21-23 Nov – Rydges lakeside Hotel, Canberra

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