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Google Drive gets Office friendly

One of the bugbears of the Google Apps ecosystem is being addressed with the launch of Google Drive for Work, which promise the ability to open Microsoft Office documents natively without the need to translate into Google Docs format. So now Google's office suite will also be able to edit and save Microsoft Office documents.

Priced at $US10/user/month, Google Drive for Work includes unlimited storage (allowing up to 5TB file uploads), advanced audit reporting and new security controls.

The ability to work in a similar way to Microsoft Office Track Changes also comes via a new feature called "Suggest Edit" mode. This enhances collaboration in Drive so that collaborators can suggest a change to a shared document, which can then be accepted or rejected with a single click.

The Office Compatibility Mode is currently available on Android and Chrome browsers with iOS support promised.

New fine-grained controls let admins manage which employees can install the desktop sync client. Also, a new audit view provides analysis of who is moving, deleting or sharing a file within or outside the company, and an audit API will also be available for developers. Apps Vault, Google's solution for search and discovery for compliance needs, is also included with Drive for Work, expanding to cover all content stored in Drive, including Docs, Sheets and Slides, as well as any other file type.

Proficiency Group wins Kofax Award

(l to r) Reynolds C. Bish - CEO, Kofax; lex White – Technical Director, Sigma Data Solutions; Lisa Read White – Director, Sigma Data Solutions; Howard Dratler - Executive Vice President, Field Operations, Kofax

The Proficiency Group has been named Kofax's Asia Pacific Partner of the year at Transform 2014, Kofax's annual customer and partner conference, which drew a record 750 attendees from 32 countries. The Proficiency Group provide ICT Services within the fields of Business Process Management and Information Governance. Trading under the name Sigma Data Solutions the organisation provides solutions to improve business process efficiency, improved customer service, reduce processing costs and achieve regulatory compliance.

The winners were chosen by an expert panel of judges comprised of Kofax executives and independent industry experts Sandy Kemsley of Kemsley Design, and David Tyler, Editor of the UK's document and content management publication entitled Document Manager.

"These winners truly embody the theme of Transform 2014," said Grant Johnson, Chief Marketing Officer at Kofax. "They've taken Kofax products and solutions and deployed them in innovative ways to increase responsiveness to customers, provide a higher level of service, gain competitive advantage and better manage and grow their businesses. We applaud every winner for putting action behind their vision."

Records SNAFU get out of jail free card

Problems implementing a $US4 million Law Enforcement Records Management solution in Dallas, Texas have allowed more than 20 inmates — some suspected of felonies – to walk free. The *Dallas News* reported that Deputy Chief Christina Smith, who is overseeing the implementation, said authorities are refiling cases and trying to find the suspects to get them back in jail.

The system went live on June 1 2014 after being purchased four years ago. Smith promised that the issues will improve with time, familiarity and planning.

"We kind of relate it to getting a new car," Smith told the newspaper. "You needed a new car, but you're not familiar with where all the gadgets are on it."

Dallas Police Chief David Brown was reported to have told a City Council Budget, Finance and Audit Committee hearing that the problems are "nothing unexpected." He said some officers initially received training months ago and may have forgotten how to use the new system.

"We've got like three generations of cops working for us," Brown said. "Some of the younger cops get it much quicker and better. Some of the veterans have more difficulty with technology, so it takes a little bit more of a learning curve."

Port Stephens cleans up with ControlPoint

iCognition, has won a contract to deploy HP's key information analysis and legacy data clean-up software, HP ControlPoint, at NSW's Port Stephens Council.

"This is one of the first deployments of HP ControlPoint in the country, and it will provide Port Stephens Council with the ability to identify, connect and control information across enterprise systems," said iCognition company Principal Nigel Carruthers-Taylor,

"We will initially use ControlPoint to understand, classify, and reduce outdated and unnecessary content in file repositories and HP TRIM, but later we see it expanding into Microsoft Exchange, SharePoint and Council websites."

HP ControlPoint helps organisations achieve information compliance by making it possible to apply disposition of policies to information in-place, or the migration of targeted legacy data to HP TRIM for appropriate records management and improved information access.

"It's a key enabling technology for legacy data clean-up", said Mr Carruthers-Taylor.

"ControlPoint helps tackle information sprawl and shine a light on dark data that is sitting unmanaged in email repositories, file shares, and SharePoint sites. We look forward to helping the Council identify, value and harness their enterprise information."

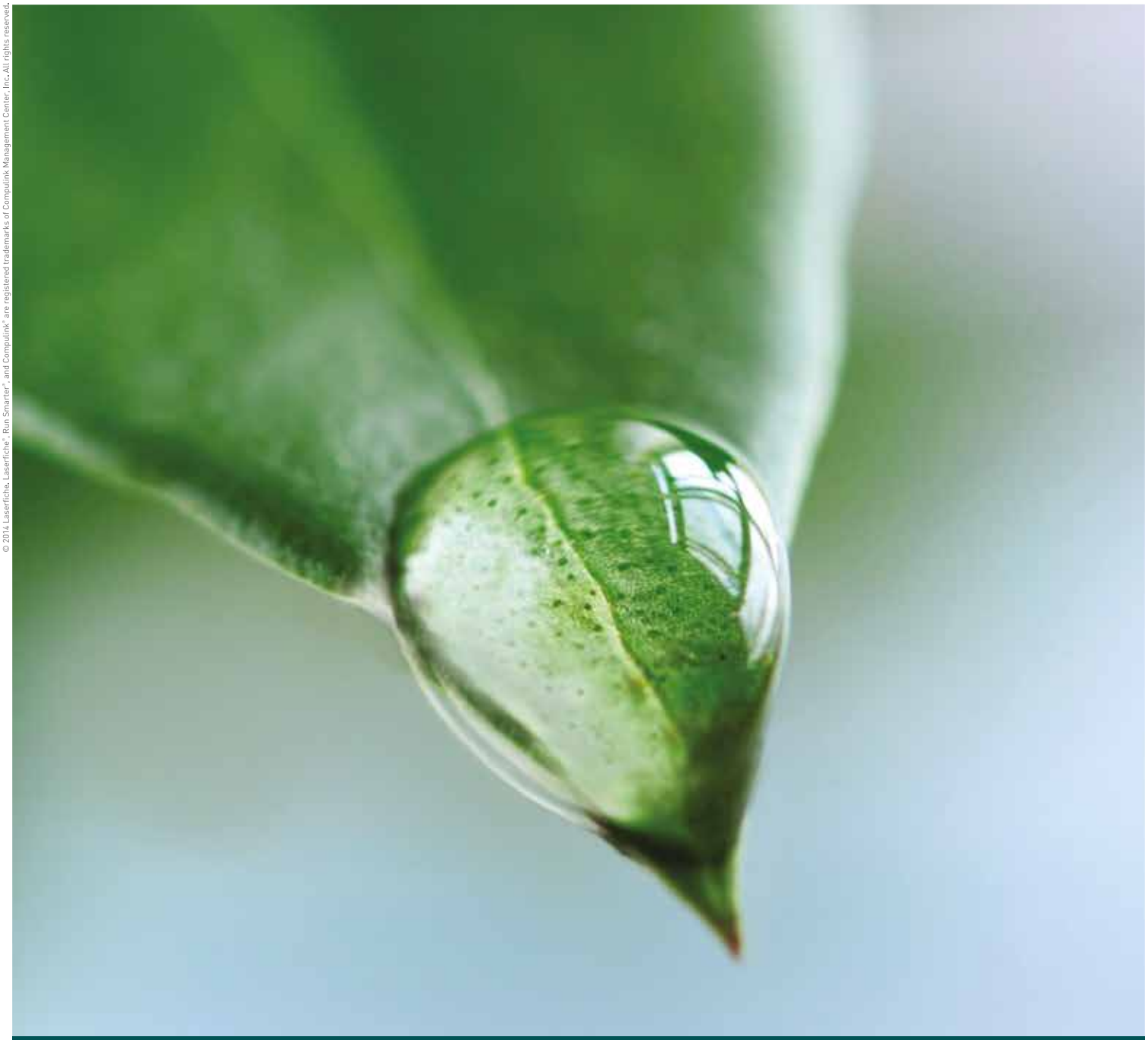
IBM Research sets Big Data record

IBM researchers have demonstrated a new record of 85.9 billion bits of data per square inch in areal data density on low-cost linear magnetic particulate tape - a significant update to one of the computer industry's most resilient, reliable and affordable data storage technologies for Big Data.

At this areal density, a standard LTO size cartridge could store up to 154 trillion bytes (154 terabytes) of uncompressed data - a 62 fold improvement over an LTO6 cartridge, the latest industry-standard magnetic tape product. To put this into perspective, 154 terabytes of data is sufficient to store the text from 154 million books.

This new record was achieved using a new advanced prototype tape, developed by FUJIFILM Corporation of Japan.

The areal density demonstration represents a potential increase in capacity of 77,000,000 times compared with IBM's first tape drive product released over 60 years ago. . It used reels of half-inch-wide tape that each had a capacity of about 2 megabytes.



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National Archives reports 95% of agencies will be digital by 2015

Australia's Digital Transition is on track, with 95% of Commonwealth agencies reporting they will have digital records and information management in place by 2015, according to the latest assessment from National Archives of Australia (NAA).

NAA Director-General David Fricker told the Information: the Currency of the Digital Economy conference held in Canberra on May 29 "This is a great result!

"It shows that across the Commonwealth we have the strategic leadership, the expertise, the technology and the commitment to achieve this essential public sector reform."

The Digital Transition Policy, announced in 2011, aims to migrate more than 200 Commonwealth Government Agencies, from the ABC to the Workplace Gender Equality Agency (WGEA), to digital record-keeping.

It aims to promote the scanning of incoming paper records and states that records that are created digitally after 2015 will be accepted for transfer to the National Archives in digital formats only.

However in 2013, more than one third of Commonwealth Agencies reported they are still printing some digital records to paper, and only 65 per cent have adequate strategies in place to manage digital information for as long as it is required."

"Of course, every silver lining has a grey cloud," said Fricker, who noted that:

- Forty per cent of agencies report duplication of records in both digital and physical formats, with 20 per cent reporting relatively high levels of duplication;
- only 65 per cent of agencies have adequate strategies to manage electronic records for as long as they are required (up from 54 per cent in 2012 and 46 per cent in 2011); and
- Despite significant improvements, the extent to which agencies scan incoming paper records remains low at 65 per cent.

A final assessment of Commonwealth agencies' digital information management maturity and capabilities will be undertaken from July 1 to September 30 2014, after which the NAA will report to government to determine future strategies.

Fricker announced that the NAA would be setting new targets for 2020 that include:

- all new business and ICT systems and tools will comply with the International standard ISO 16175, Principles and Functional Requirements for Records in Electronic Office Environments;
- agencies will make and record business decisions digitally, using digital authorisations and workflows;
- the Archives will develop a Commonwealth data interoperability standard for safe, trusted and efficient sharing and re-use of digital information between agencies;
- all agencies will meet minimum metadata standards set by the National Archives so digital content is described, shareable and re-usable;
- all agencies will meet standard professional records and information management specialist qualifications, skills and capabilities set by the National Archives.

Objective reappointed for NSW Govt.

Objective Corporation has been re-appointed as an accredited supplier to the NSW Government under the NSW ICT Software agreement (Contract 607).

Tony Walls, CEO of Objective Corporation said, "Objective's appointment to the NSW ICT Software agreement highlights our proven ability to deliver solutions that meet the requirements of NSW Government organisations and our alignment with the NSW Government's ICT Strategy."

NAA undertakes its own Digital Transition

As an example of the NAA "walking the walk, not just talking the talk", the National Archives of Australia (NAA) has undergone its own Digital Transition for the process of authorising records authorities – implementing an electronic workflow via its TRIM EDRMS.

Anne Lyons, NAA Assistant Director-General, told the HP Information Governance forum in Sydney, "Records Authorities, which the NAA issues, gives Australian government Agencies permission to legally dispose of Commonwealth records once they are no longer needed. They also provide instructions for the disposal of records including identifying which records are of enduring value and transfer to the Archives. Under the Act no record can be destroyed unless its authorised by the National Archives, and that's what a Records Authority does, so Records Authorities are significant to agencies and are a very central legislative function of the archives."

Until last year these Authorities were authorised by the NAA Director General with a wet signature, and this process has now been digitised with records created and managed digitally all the way through.

"The key drivers for us in selecting this process were that we are the lead agency for the Digital Transition and thus required to meet the policy ourselves as any other agency," said Lyons.

"It also was able to give us a benefit of building experience and identifying pathways internally as well as supporting and developing advice to other agencies, so practically implementing what we were advising others to do, walk the walk as well as talking the talk."

After undertaking risk assessment and developing a business case a number of technical options for digitising Authorisation were investigated. Initially the process was digitised through the exchange of Authorisation emails and capture of records in the EDRMS used in TRIM.

"We took advantage of the existing technologies and processes in TRIM and so we used the TRIM workflow tracking to notify staff of actions they need to perform and to record completed actions within the system itself including the electronic authorisation. So the press of a button by the authorised person using that system included the final Records Authority endorsement and authorisation by the Director-General," said Lyons.

"It was a tracking workflow that we used, started and completed electronically, emailed to agencies and published online end to end digital. It has been accepted by agencies and is working extremely well, with no paper in the process."

Objective solutions have been engineered in Australia to meet the requirements of government and regulated industries. Objective ECM 8 is widely used by public sector organisations in NSW and around the world to effectively manage the large amount of content and knowledge that proliferates all levels of government, managing electronic information securely and ensuring transparency and auditability.

Tony Walls said, "Objective is pleased to be working with the NSW Government to simplify the procurement process for their departments and agencies when they procure Objective products and services and are looking forward to helping."

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So you think you need an EDRMS

By Kate Fuelling

While I am a keen advocate of electronic document and records management systems (EDRMS), when clients ask me if its the first thing they need, my answer is usually 'no it's not'.

Am I talking in oxymorons or am I just a moron? Shall we ask our panel of judges?

One Umbrella Consulting recently ran a nationwide survey to see if EDRMS implementations were achieving the outcomes that organisations were expecting. Respondents were balanced between industries and organisational size, and were primarily records management people.

Some of our survey findings may surprise you, some may not. You may shake your head at what some organisations don't do and you may even recognise a little of your own organisation. Do any of these findings sound familiar?

- Only 20% surveyed stated that they had clear advice as to where to save information (*Fig. 1*)
- Only 40% of respondents thought their organisation manages their information very well or well (*Fig. 2*)
- Less than 50% had organisation-wide RM training and 37% had no training available at all (*Fig. 3*)

But what did ring true for all the organisations surveyed is that many of the main problems cited were **nothing to do with systems at all.**

Here are a few of the comments:

"Lack of collaboration, lack of RM Knowledge, silo mentality ...

"Lack of face-to-face support, rift between document controllers and Information managers ...

"Duplication of processes. No clear guidelines & Policies. High turnover of staff and less training opportunities ...

"No buy-in from the management - no importance placed on information management ..."

And if the practices in *Fig. 1* are anything to go by, you'll understand that these are going to manifest in retrieval problems. It is, therefore, hardly surprising to learn that half of all respondents indicated that their organisations experience a high level of frustration when searching for information frequently, if

not on a daily basis, and that searches often came back with incomplete results.

But what was the most telling finding of all?

Over three quarters of respondents stated their organisation use a system other than network drives (*Fig. 4*) to store documents and records.

So even with some form of an EDRMS (and yes, we're including SharePoint in this mix), records management problems are still occurring. It looks as though our judges may agree with us... implementing an EDRMS will not miraculously solve your records management problems. We're through to the next round. But the next round is tougher. Why not?

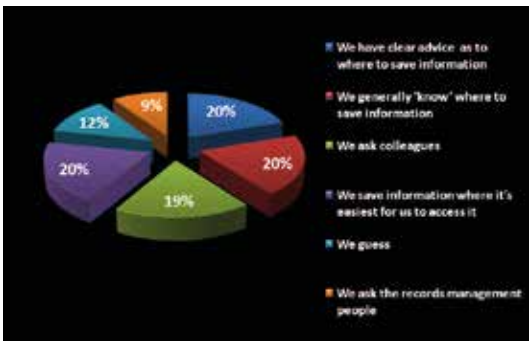


Fig. 1 How do people know where to save information

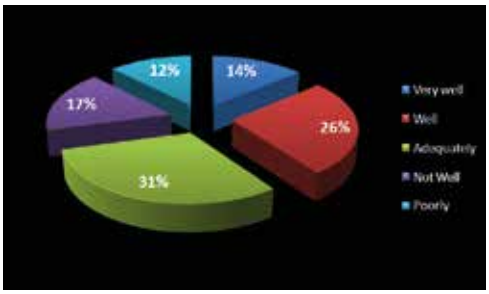


Fig. 2 How well does your organisation manage information?

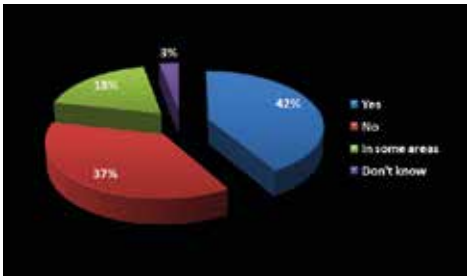


Fig. 3 Availability of Records Management training

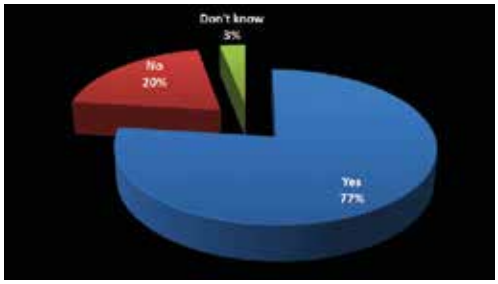


Fig. 4 Do you have an EDRMS?

Generally when an organisation is considering such a large investment as an EDRMS, they have significant business drivers. And generally in our experience, these drivers seem to be "*we've been audited* or *we've gone to court and been publicly roasted for our lack of records management*" or "*we're a government organisation so we need one*".

Hardly ever do I hear something like "*it's the next strategic step in our records management plan*". So from the get-go, organisations may be working off the wrong premise – that an EDRMS is a magic pill.

This is then exacerbated by the EDRMS implementation project itself – typically an enterprise-wide big bang, run with few project team members and gross underestimation of the risks and change management involved.

In May this year, One Umbrella Consulting partnered with independent consultant David Brown to conduct seminars on how better to approach EDRMS projects. This David Brown is the ex-KPMG David Brown (not to be confused with other gentlemen of the same name, for those of you in the Victorian records industry). David has been a senior information management advisor to federal ministers and within KPMG International for many years and has been involved in many EDRMS implementations.

An ex-colleague suggested that David and I should meet and have a chat, with a view to working together. We met at a very loud and bustling Melbourne coffee shop and proceeded to spend the whole time talking about the terrors and pitfalls of EDRMS implementations – our voices were probably some of the loudest, as we got more and more passionate about the topic. And so our seminar idea and philosophy was born.

When we are saying **'no it's not'** to the EDRMS question, what we really mean is, well perhaps not yet anyway. Start looking at the bigger picture and other possible solutions.

The key elements of our philosophy include:

Stop seeing an EDRMS as the end game - the goal is not an EDRMS – it's good document & records management.

An EDRMS is only one element of your records management strategy and program, not the whole strategy and program itself.

And the big, controversial ideas of our philosophy:

Implementing an EDRMS is not an IT project.

It's not even a project.

It's an ongoing commitment.

It's about people and their daily work practices.

What does that mean exactly? If you look at an EDRMS through the lens of our philosophy, your focus changes. Instead of thinking a system will fix your RM problems, it's more about the smaller/bigger picture (there I go again with those oxymorons).

The people, the processes, the governance structures and yes, the systems and tools too, make up your RM framework. Every small element has a part to play to make the bigger framework effective.

If you look at some of the RM issues our survey participants are experiencing, they can be addressed by quite simple solutions other than a new system.

So, only 20% of the respondents stated that people in their organisation have clear advice as to where to save information. Well, what about a '*Where to Save Your Information*' guideline that's provided to every new employee as part of their induction? Even if it's the shared drive you want them to save to, at least it's getting people used to the discipline of an authorised area rather than 'guessing' where to save things.

Kate Fuelling is General Manager and Principal Consultant at One Umbrella Consulting.

Our point is that changing your focus from an EDRMS to a Records Change Management program with a number of small elements will actually reap more benefits in the end.

A clear case of the sum of the whole being bigger than the sum of the parts. And when you get enough of these small elements in place, then it's time to look at an EDRMS. But perhaps that's for the next round.

SharePoint & TRIM

Better together or apart?

It started with a simple question on a discussion group, where are the success stories of Victorian state government agencies deploying SharePoint in tandem with HP TRIM? However after a series of vigorous posts from users, consultants and vendor alike, the topic had turned to the advisability of mixing your drinks, so to say. Does it in fact make sense to think of deploying SharePoint in tandem with another ECM platform?

Today, Microsoft SharePoint is a big part of the ECM story. In fact, according to Forrester Research, SharePoint has been deployed in 78% of organizations for content management.

Many organisations are using SharePoint as an ECM system outright, often displacing their existing system with SharePoint. Other organizations, with specific ECM requirements, like VERS records management, support for engineering CAD drawings, and the need for electronic signatures, are integrating SharePoint's collaboration and social capabilities with dedicated ECM solution

Information Architect Andrew Warland cannot understand why organisations would want to integrate the two.

"From what I can gather, the reasons appear to be something along the lines that users would prefer to use the browser-based SharePoint front end (to save documents in TRIM) and/or organisations want to somehow 'archive' SharePoint content into a 'better' recordkeeping system. Both of these reasons, in my own humble opinion, are based on flawed premises.

"Integrating any two products will be a joy for both vendors, a potentially huge pain for the people who have to make the integration work, and an ongoing hassle for organisations that have to maintain the integration through patching and software updates.

"If you feel your users need a better way to save documents in TRIM, this suggests a need for better training or using a different product entirely (I think the former works well). Remember too that SharePoint does not 'point' to documents stored in a file store but stores them within the SQL database. So, by storing them 'in TRIM', you are effectively taking them out of the SharePoint database and storing them as blobs in the file store, making SharePoint (more or less) another database like the TRIM database. So, now you have two databases to work with.

> "Integrating any two products will be .... an ongoing hassle for organisations that have to maintain the integration through patching and software updates."

"If you feel you need to 'archive' SharePoint content into TRIM (or any other product), I'd be asking how (and when) you plan to do this, and how you propose to retrieve the archived content in a way that makes sense. It suggests there is a need to improve your SharePoint governance (in particular the back end) to want to archive content somewhere else.

"I still come back to the question - why? What was the rationale in your business case, and did the people writing the business case have a deep understanding of how both products work, or

just thought they were seeking methods for either of the issues mentioned above."

Consultant Rosemary Kaczynski is another who believes there is no need to deploy traditional recordkeeping software packages in conjunction with SharePoint.

"Recordkeeping needs to be an organic part of the business process, so stop complicating the issue with the deployment of two or more systems capable of achieving the same result – make a decision either way and just put in the right rules, structures and processes. This will not only save your Organization heaps of money, but may also allow practitioners to get out of their comfort zones and experiment," she suggests.

While agreeing never a wise idea to embrace the extra complexity of multiple products if there is no need to (different development cycles, integrations to maintain, multiple vendors to deal with etc.), Russell Clarke, Manager - Information Management at New Zealand's Parliamentary Service, notes that not

> "Not everyone has the luxury of starting from a clean sheet..."

everyone has the luxury of starting from a clean sheet.

"It's an overhead that if you can avoid while achieving your business requirements then we'd all be wise to avoid. And yet it's all about and always has been all about, governance and business process alignment etc. I've never heard anyone say that it is not.

"I've seen plenty of cases where the agency only sought to expose TRIM/Objective/CS10 [insert name of your favoured ECM solution] Web Parts within SharePoint because they were seeking to create project spaces, etc. without the complications of having to port content from the SharePoint library into the ECM.

"At the other end of the spectrum there are the scenarios where agencies seek to use SharePoint as the 'creative/'collaborative' space (now that's a word that is in serious need of a definition control!) with some complex workflow funnelling electronic business records into the ECM repository at some key point in the business process. Yes – a bit like those SharePoint/RecordPoint hybrids.

"But I also suspect there are lots of agencies out there who may be asking similar questions to this … purely because they have an existing long-standing business information investment in TRIM/CS10 , etc., and now their CIOs are trying to shoehorn SharePoint in between the creators and the ECM for various reasons rather than undertaking the total replacement approach …."

Miles Ashcroft, Director Consulting and Enablement at RecordPoint, warns that trying to link SharePoint and another ECM solution is fraught with both technical and even functional issues.

"I think Russell is correct in that if all you are trying to do is surface a simple view of content into SharePoint – almost a publishing model into SharePoint - then integration at this very light level can meet this specific need.

"Issues arise when this starts to become more ambitious integration - with SharePoint being used as the place where content is created and actively worked on (rather than just viewed).

"You can end up with the worst of both worlds – potentially negating the reasons that users like SharePoint (its collaborative less structured approach) by imposing a traditional Records view in your SharePoint design or compromising the operation of your backend legacy eDRMS – duplicating content in both systems is an issue we have seen for example.

"You might be able to get away with SharePoint out of the box in combination with good governance and process – however, this doesn't scale particularly well once you start to deal with any volume of content or more complex SharePoint environments. This is where products like RecordPoint come in to allow to give you the additional tools to apply records controls to larger amounts of content in SharePoint.

"The alternative of bolting in a traditional eDRMS, results in a complex beast with a lot of moving parts. You need to be sure that you have the bandwidth and capabilities within your organisation to manage that complexity."

If SharePoint is now going to be the centre of your users' universe where they create and work with their documents then (if you can) stick with a SharePoint based solution, Ashcroft recommends.

But I Want Outlook to be my Document Management Desktop!

Struggling to get your users to adopt SharePoint as their new way of managing documents and emails? Noel Williams explores the functionality and UI features that business users need if they are to be happy when SharePoint replaces their existing Windows file shares and Outlook folders – and maybe even their traditional DM system.

Before SharePoint came along, users in most organisations managed their Outlook emails by dragging and dropping them from their inbox to another folder in Outlook, and managed other types of files by saving them in folders on a shared drive. Some organisations were able to do a better job of managing emails and other documents because they had invested in a document management system. Let's refer to these as 'traditional' DM systems, to distinguish them from the new breed of DM solutions based on SharePoint.

The vendors of these traditional DM systems learned a lot about what made users like using those systems to manage their documents and emails. One of the major lessons they learned is very relevant to anyone who would like their users to move to SharePoint instead of file shares and Outlook folders. That lesson was that users wanted to be able to handle – or at least start to handle – all their document and email management tasks while they worked in Outlook. The reason for this was because so many users spend a lot of time in Outlook. To put it in the words of several users I have spoken to – "I want Outlook to be my Document Management (DM) Desktop".

Microsoft's main focus, however, appears to have been on the web browser user interface for SharePoint – probably to emphasise and take advantage of the web-based nature of SharePoint. It is as if Microsoft feels that the web browser, rather than Outlook, should be your DM desktop. In my experience, business users do not agree. While IT folks might be OK to use the SharePoint web browser UI when they want to load documents to and retrieve documents from SharePoint, business users generally prefer to be able to manage their documents and emails while they work in familiar rich-client applications, particularly Microsoft Outlook. Business users find it quite counter-intuitive and time-consuming to have to leave Outlook and jump out to the browser when they want to save, find or retrieve documents and emails.

This gap between the OOB capabilities of SharePoint and the expectations of business users has given rise to a raft of Outlook add-ons for SharePoint. All of these Outlook add-ons offer drag-and-drop saving of emails, because this is a fundamental requirement as far as a business user is concerned – after all they have been able to save emails by dragging and dropping between Outlook folders for as many years as they can remember.

The ability to save emails by drag and drag is essential but not enough to make business users happy with SharePoint for managing emails and documents – and a long way short of being able to regard Outlook as their DM desktop. Let's take a look at a range of features and experiences that can make business users glad that they made the move to SharePoint.

Saving Emails – Not Just Drag and Drop

Users are accustomed to sub-second response times when they save an email by dragging and dropping it to another folder in Outlook – either a private or public folder. They are looking for the same responsiveness when they drag and drop an email to SharePoint.

A key aspect of that responsiveness is avoiding any prompting for metadata as an email is being saved to SharePoint, because there is no such prompting when you save to another folder in Outlook. The concept of metadata is familiar to Outlook users. The default view of an inbox and other Outlook mail folders displays email attributes such as From, Subject, Received Time, Attachments, etc., but in Outlook all this metadata handling is automatic, so it should also be automatic when users save to SharePoint. Users saving emails in Outlook do not need to assign file names to the saved emails, so if SharePoint requires a file name to save an email, users expect that the file name will be assigned automatically and not necessarily displayed when they view the saved emails in SharePoint.

From the users' perspective another critically important consideration is what happens when they drag and drop to save multiple emails in a single step. This 'bulk email filing' use case occurs frequently – e.g. as the user cleans up his / her inbox at the end of the day / week / project. Within a few seconds of dropping onto the desired destination area in SharePoint, users want to be able to resume working in Outlook, including to save more sets of emails. Users do not mind if the bulk save to SharePoint proceeds in the background, as long as it does so without interrupting them. The reason why organisations want to save emails to SharePoint is essentially the same as for saving them to a public folder or to a traditional DM system – i.e. the organisation wants to keep a secure, central copy of all important emails, which is NOT the case if individuals are saving those emails to private Outlook folders, or leaving them in their personal inboxes. Ideally there should be a single copy of each important email. In other words, duplicate copies of an email should not be created if multiple recipients of that email attempt to save the same email to the central store. This is an area where SharePoint has an opportunity to shine compared to previous email management approaches, including some traditional DM systems,

Noel Williams is co-Founder and Chief Executive of MacroView Business Technology. MacroView specialises in document generation and management solutions based on SharePoint and Office.

which generally do not do a good job of preventing duplicates.

Because they need to deal with so many emails, business users are keen to find ways to reduce the effort associated with filing emails. They recognize that not all emails are important enough to require saving, but would like the system to intelligently assist them in identifying and filing the ones that do need to be saved. Traditional DM systems and some leading CRM systems have addressed this need with Predictive Email Filing capabilities, which use From and To addresses and special tags appended to the subject of emails to automatically suggest where those emails should be saved. The user then has discretion to accept the recommendation, and the email is saved with minimal user effort. Various Outlook add-ons for SharePoint email and document management now provide similar predictive email filing capabilities.

Visualise & Navigate the Document Store

A complaint often heard from users as they struggle to adapt to a new SharePoint solution for managing emails and documents is that they find it much more difficult to visualise and understand the structure of the document store, now that it is in SharePoint. Previously they could see a tree of folders in Outlook and a tree of folders in their Windows file share(s). These folder trees may have been large and messy, but users found them intuitive. Navigating was a matter of clicking around the folders, again a potentially messy process, but one the users were very familiar with.

Following the move to SharePoint the users were finding that they could no longer view the full tree structure, and that to navigate around with the OOB SharePoint web browser UI they needed to click breadcrumbs and key in URLs. As one business user noted: "SharePoint is fine if you want to store and retrieve from your own Personal site, but not much fun if you needed to work with a large number of customers and projects."

This is another area of opportunity for SharePoint based add-ons. If the add-on can display the complete tree structure of SharePoint and especially if it provides an efficient means for quickly navigating to a particular area of SharePoint – say the document library or document set that corresponds to a project on which that user is working – SharePoint can definitely be more appealing than the solution that it replaces. This is because navigating a large public folder tree or a large folder tree in a file share is not at all user-friendly.

An approach that is used by a number of Outlook add-ons is to attempt to model the structure of the SharePoint store using folders in the Outlook mail folders pane. While this approach does allow the user to interact with the SharePoint store directly from Outlook, it has real limitations as the SharePoint store grows large. This is because the MAPI tree that underpins the Mail Folders pane of Outlook was not designed to contain as many nodes as can be present in a large SharePoint document store. A much better approach is to have an additional pane in Outlook that is purpose-built to efficiently and accurately display a large SharePoint site collection/site/library/folder tree and to facilitate navigation of that tree.

Business users appreciate being able to have very easy (ideally one-click) access to the areas of the SharePoint store that they use frequently, and to be able to work with these areas while continuing to work in Outlook.

Favorites play a similar role for users of Internet Explorer. To be fully useful in a SharePoint document store, it should be possible to add an area such as a site or document library as a Favorite and then expand it to see the sub-sites and libraries, and/or the document sets and folders that are contained in the Favorite area. This enables a business user to easily view, save to and retrieve from any project for a favourite customer.

This need to visualise is not just about the structure of a SharePoint document store. Business users expect to be able to see all available views of a document library and to see formatted previews of files in those libraries, a familiar activity in Outlook inboxes and other folders.

(Continued over)

Incoming and Outgoing Attachments

The business user expectation to be able to save by dragging and dropping extends to attachments as well as emails. When saving attachments users will accept some prompting for metadata, although generally speaking user adoption will be improved if there is less rather than more metadata to be supplied.

In my experience, users prefer to drop their attachments onto a specific container (which can be a document library, document set or folder) which has automatic metadata defined for it, rather than drop onto a single large container and be prompted for a lot of metadata. They want SharePoint to feel like their Outlook folders, not like a database!

Like a Windows file share, SharePoint insists that every file it stores has a file name, but compared to a Windows file share, SharePoint is strangely fussy about the characters that can be used in its file names. To the great annoyance of business users, SharePoint will error if they attempt to upload an attachment whose file name contains quite commonly occurring characters such as # or &. Business users expects that these files will be uploaded without errors and that the original, unstripped file name also be recorded, and ideally reinstated if the uploaded file is subsequently retrieved from SharePoint as an attachment to a new outgoing email.

If multiple attachments are being saved in a single step, users appreciate being able to set common metadata rather than be prompted separately for each attachment. Unfortunately the bulk upload process in the web browser UI (which is the way many users save multiple attachments) does not prompt for metadata at all!

A use case that occurs quite frequently in many organisations involves filing an incoming attachment as the next version of an existing document, which has a different file name to the incoming attachment. A SharePoint solution that accommodates this need in an intuitive manner will be much more popular with its business users. A major turn-off for users of earlier releases of SharePoint and Outlook was the clumsy process that was involved in retrieving a file from SharePoint for insertion as an attachment to a new outgoing email. The process has improved somewhat by SharePoint 2013 and Outlook 2013, but even with these releases is still awkward if you need to search SharePoint to find the file(s) that you want to attach. We'll look more closely at this searching issue later.

For business users to be happy with a new SharePoint document management solution, they need to be able to browse and / or search SharePoint to find files, and then easily insert them as attachments or links in an outgoing email. If the user has prior experience of a traditional document management system they will expect the resulting links to function correctly even if the file has been moved to a different location in SharePoint. This is because most of the leading traditional DM systems identify a file by its unique Document ID rather than by its location, which is the default approach in SharePoint. However SharePoint can meet this requirement around links to moved documents, providing its Unique Document Numbering feature is activated and its search index has been updated.

Searching Direct from Outlook

One of the major motivations for wanting to replace file shares and Outlook folders with a SharePoint-based solution is to take advantage of the extra capabilities that SharePoint offers for managing documents.

Perhaps the most attractive of these additional capabilities is fast searching for documents and emails based on both their content and their metadata.

Users are familiar with such searching in Outlook, which supports indexed searching for emails. So it is reasonable for users to expect to be able to continue searching from Outlook once their emails are stored in SharePoint. Given that SharePoint also stores all types of documents and supports additional metadata, user expectations are for an even better search experience while they work in Outlook.

Here again the OOB integration of SharePoint and Outlook is a source of disappointment for users. Instead of being able to search directly from Outlook, they need to jump out to the SharePoint web browser UI to perform a search across SharePoint. The Advanced Search page in the browser UI can be enhanced – e.g. to pre-display controls for specific metadata attributes so that entering search criteria is more convenient. But that does not take away the inherent frustration of having to leave Outlook to do the search.

An excellent example of that frustration is when a user needs to search SharePoint in order to find a document (or documents) that they want to attach to a new outgoing email that they are composing.

What the user really wants to be able to do is click the paper clip icon on the Insert ribbon (or equivalent in earlier versions of Outlook), perform the search and then click to select one or multiple search results to have them inserted as attachments. Instead the process is as follows:

- Leave Outlook and go into the SharePoint browser UI;
- Locate to the search page and enter the search criteria;
- Inspect a search result by opening it in its relevant application;
- Save the open document to a local drive;
- Go back into Outlook on the new message window;
- Click the paper clip on the Insert ribbon and find the required document on the local drive;
- Click to load the required document as an attachment;
- Ideally, delete the temporarily saved document from the local drive.

The Outlook 2013 interface does provide the ability to search an individual SharePoint or Office365 Document Library to find an attachment while sending an email, but this interface is not effective for most corporate users, who typically need to interact with a SharePoint document store that contains hundreds of document libraries, scattered across a tree of sites.

Fortunately there are number of Outlook add-ons on the market that enable intuitive searching for documents in SharePoint, directly from Outlook. Using such add-on software reduces the user effort required to perform the routine task of finding and inserting an attachment to just 5 user input actions – as compared to a minimum of 14 when using the OOB SharePoint UI. This 280% improvement factor is very significant indeed when you are wanting users to adopt the new SharePoint-based solution.

In addition to searches based on content and metadata some of these add-ons also support saved searches, formatted previews of search results and customising of search panels and search result displays to reflect the way metadata is used in a particular organisation.

Where to From Here?

Hopefully the observations above will assist you as you embark on a project to implement SharePoint for managing emails and documents – or perhaps as you seek to understand why the business users in your organisation have not adopted a new SharePoint solution for email or document management.

While it is clear that OOB SharePoint falls well short of meeting the expectations of business users, the good news is that add-on software is now available to plug those gaps to the point where users can regard Outlook as their DM Desktop.

Enterprise Search uptake low: survey

The risk of employees locating and accessing files they should not have permission to view is limiting the uptake of enterprise search, according to a new survey by Varonis Systems. It asked 300 enterprise IT security professionals at two major security-themed industry events, and found that only 38% of IT departments have invested in or plan to invest in enterprise search capabilities for a range of reasons topped by security concerns.

When asked to choose the biggest obstacle to enterprise search adoption, 68% cited the risk of employees locating and accessing files they should not have permission to view. Further, even if an enterprise search solution perfectly filters out results based on established permissions, the majority of respondents indicated they are not confident that their organization's existing permissions are accurate.

Additional obstacles to enterprise search adoption most commonly cited were accuracy of the results (36%), end user adoption (29%) and the ability of solutions to scale enough to index all the data (24%). Utilizing the results, the study was able to identify the features that an enterprise solution must have in order to fulfil the needs of employees, as well as gain acceptance from IT and security departments. Survey respondents said the ideal enterprise search solution must include:

- The ability to not only enforce, but also improve upon current file permission information in the search filtering process
- Index file contents quickly and also mirror changes as near to real-time as possible
- Rank results based on learning about overall group behaviours by analysing access activity

David Gibson, VP of Marketing at Varonis, said, "Given the reliance consumers have on web search and the value we all derive from it, one might think that the power to easily find business documents would be equally compelling for enterprises. But there are clearly obstacles that past approaches have failed to overcome.

"We knew this when we set out to build DatAnswers. By utilizing the Varonis Metadata Framework technology, DatAnswers not only applies established permissions but refines its search results to be even more effective over time as more metadata is collected. The solution understands the relationships between employees and files, and knows who is regularly accessing what content. DatAnswers provides secure results based on the organization's permissions and also identifies which permissions may be incorrect and adjusts the results accordingly."

DatAnswers, Varonis' secure enterprise search solution for NAS, Windows file servers, and SharePoint files, was introduced in May.

The full enterprise search study can be found at http://info.varonis.com/enterprise-search-report.

Look and you won't find, probably

Just 56 percent of the time can users find the information required to do their jobs, according to a new survey of more than knowledge workers from private and public sector organizations from International Data Corporation (IDC).

The analyst firm concludes unified search and analytics technologies are required in helping organisations meet their knowledge management and information retrieval objectives.

The report, titled "*The Knowledge Quotient: Unlocking the Hidden Value of Information Using Search & Content Analytics,*" was sponsored by search and analytics vendors Coveo and Lexalytics. It discusses the impact of the dramatic rise in unstructured data on knowledge worker performance and provides brief studies of organizations investing in technologies to unlock the value residing within this data. Some key findings from the report include:

-- 61 percent of knowledge workers regularly access four or more systems to get the information they need to do their jobs, and 13 percent access 11 or more systems.

-- 36 percent of a typical knowledge worker's day is spent looking for and consolidating information spread across a variety of systems.

The impact of these challenges on an organization's bottom line can be considerable. Specifically, the report states that an enterprise with 1,000 knowledge workers loses an average of $US5.7 million annually to lost productivity due to employees searching for, but not finding, relevant information.

"The IDC report underscores the struggles that many organizations face in integrating their diverse streams of knowledge and making it accessible and actionable for employees," said Diane Berry, Chief Knowledge Evangelist at Coveo. "To unlock the hidden value of their content, innovative organizations are adopting technologies that virtually synthesize their diverse structured and unstructured information, and make it accessible to knowledge workers securely in the context of their work."

"As we see from the IDC report, 44 percent of the time, workers can't find the information required to do their jobs," said Seth Redmore, VP Product Management at Lexalytics. "That's a lot of wasted time, and shows a clear need for broad use of knowledge management systems that leverage the intelligence of text mining."

Intelligent Document Understanding

Transforming disparate data into valuable knowledge

There are individuals, no doubt, who fondly recall the days of simplified document management. There were forms, correspondence, receipts, purchase orders and so forth, but they were all quite straightforward and arrived as pieces of paper.

These documents arrived at a company, were scanned and entered into a Content Management System, then accessed by or sent to the appropriate individuals, departments, repositories or other appropriate destinations.

There was no need to worry about e-mail correspondence, Tweets, Facebook posts, images from smartphones, SMS/text messages, or multiple other information sources that are now part of our wired, social media world.

Of course, the evolution of Electronic Content Management Systems address a portion of these challenges and help to automate and better govern information capture, management and storage. But many aspects – such as multi-channel capture – remain cumbersome, due to the volume and complexity of formats and limitations of technology.

Today, there is innovative technology available to better aggregate disparate data and make it intelligently useful for the enterprise and automate business processes. Advanced capture, Intelligent Document Recognition (IDR), classification and data extraction, multi-channel capture and other emerging solutions that go beyond paper to address that whirlwind of sources, data and formats.

Real-world situations

Let's meet three individuals who will also aid us in discussing a practical application of Intelligent Document Understanding in the real world.

First, Larissa is a knowledge worker in the insurance industry, employed as a claims processing agent. Next is Jim, a customer of the insurance company. His car was damaged when a neighbour's tree fell on it during a recent hurricane. And finally Dave, an insurance company agent in Jim's hometown.

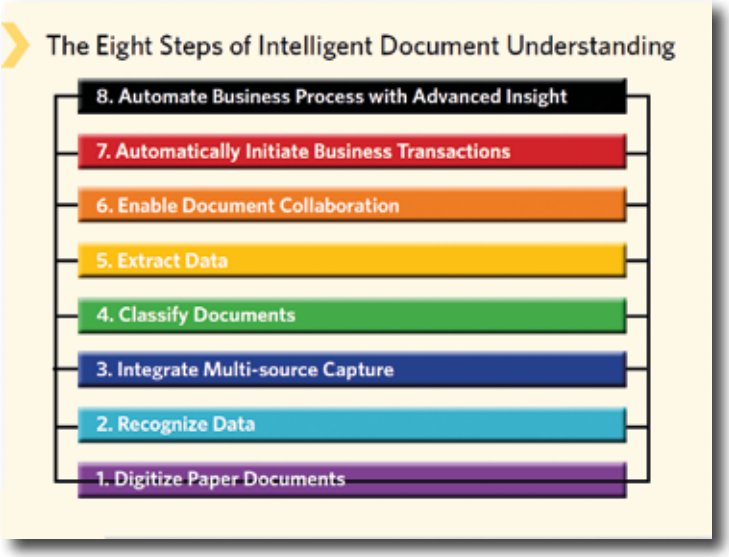
The information about damage to Jim's car arrives at the insurance company, more precisely at Dave-the-agent's office and the main office from different channels (picture, electronic form, paper documents, etc.). It takes a good deal of time, many phone calls and repeated attempts for Larissa to collect all these information elements that she needs.

Once aggregated, Larissa reads each, recognizes data types and elements, and enters key data into the insurance company's document management system, associating a name (such as Jim, a customer with a policy) with a client field, a claim number, a damage amount, and so forth. She enters information (metadata) into the system.

Larissa then uses the insurance system to obtain details about Jim's policy and determine claim eligibility, based on rules she has learned, thus using her knowledge. With the information provided by the documents and insurance system, she can make a decision, process Jim's claim, and send him a cheque.

Larissa, her management team, and customer Jim would all appreciate if this process could be sped up and became more transparent throughout, in order to answer questions in a timely, accurate manner. The eight steps we will outline next will demonstrate that these goals are achievable.

Now, before we embark on a quick trip through the Eight Steps



of Intelligent Document Understanding, we should note that – depending on individualized organization situations – the order of these steps may occasionally vary.

Step 1. DigitiSe paper documents

Paper documents need to be digitised to make them ready for data recognition and machine readability in Step 2.

While you may hope that paper is going away, an AIIM white paper from 2012 states that the paperless office is far more dream than reality. While paper document levels are decreasing somewhat, companies handling less paper are only slightly more prevalent than companies experiencing greater paper volume, according to the same AIIM report.

Real-world update: 45% of scanned paper documents are actually "born digital," as PDF files, faxes, Web forms, Microsoft office documents, etc.

Step 2. Data recognition

Having scanned and digitised the invoice in Step 1, this document has been converted into an image.

In order to make it valuable for Larissa, we need to recognize the key relevant data elements. Helping Larissa to automate this recognition will result in significant time savings.

This is a good opportunity to take a look at the five common techniques for reading data from paper. Starting at the top, these techniques range from very accurate and fast … to less precise and more time-consuming.

Barcode - Fast and accurate, but limited to a small number of document types as printing at the source is mandatory. In our example, the document can be identified as a claims report via an imprinted barcode.

Object Mark Recognition (OMR) - converts written marks in data fields, such as yes/no answers. Commonly used on surveys, applications, school Settlement Account tests and so forth. It's gradually being replaced by Card Account Web form capture. Barcode and OMR don't read an entire document, but extract key data from forms.

Optical Character Recognition (OCR) - recognises printed text. It's now a mature technology and typically offers high accuracy on Latin-based characters. It is still in development with some Asian languages. OCR is a computing-intensive process that can slow PCs that don't have enough "horse power."

(Continued over)

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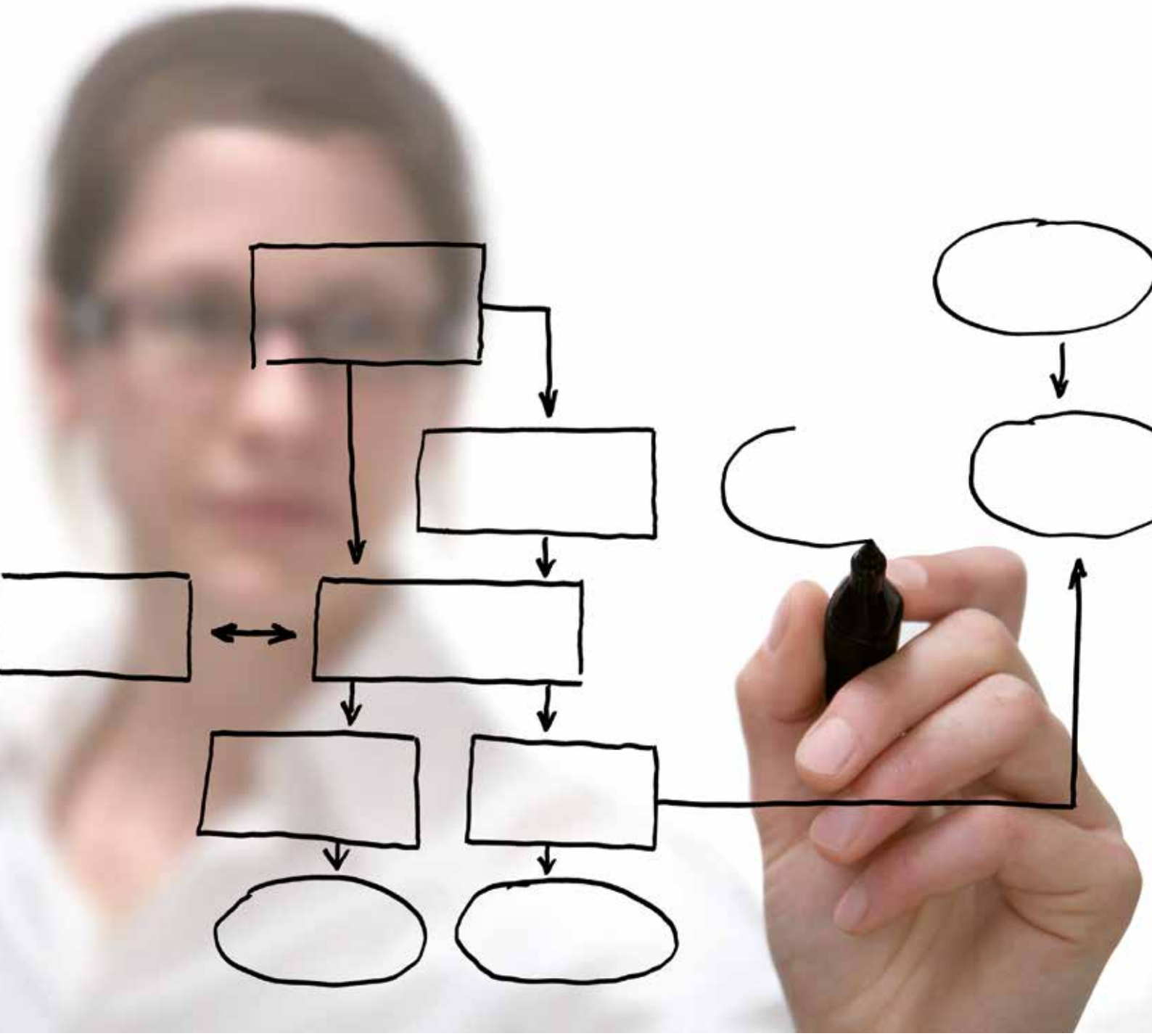

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Intelligent Document Understanding

(from page 14)

Intelligent Character Recognition (ICR)/handprint recognition - the least mature and by far the least accurate technology, unless severely constrained, such as in recognizing characters inside form boxes; when using a limited vocabulary, such as 300 medical terms; with redundant information (reading cheques); or when information can be matched in a database (reading postal addresses requires but a few characters to accurately determine a match in a postal database). Recognition of unconstrained free-hand, cursive writing remains very challenging. =

Step 3. Multi-source integration

Today, expanding information sources (in both type and volume) carrying critical input for a business process – like our insurance claim example – create major headaches for companies.

Going back to our example: in addition to the invoice that Jim the customer handed to insurance agent Dave, he had already taken a photo of the damage from his smartphone and sent it to the insurance company. Unfortunately, Jim forgot to include his customer number. Jim then went online and completed a claim report electronically. Subsequently he called the insurance company and asked them to connect the photo he sent with his claim report.

In order to streamline this example, we have not even mentioned new channels like social media that should not be underestimated with regard to their volume and importance.

Today, few organizations can boast of an efficient, integrated multi-source capture process. And the sources of information continue to expand. If we revisit Larissa and our insurance example, customer Jim files his claim via Web form, calls his agent over the phone, transmits damage photos through his smartphone, mails the repair invoice and – depending on how he feels about the experience – may Tweet about it.

Currently, most of these input channels are still absorbing a good deal of Larissa's valuable time through manual processes. And those that are automated cover one input source only, such as paper-based documents or e-mail communication. Locating and connecting these input streams is a major challenge for Larissa in trying to process the claim. She must manually connect and aggregate all the separate inputs:

Web forms, voice mails, photos and more into a case folder. This is a time-intensive process and she does not have much help from the existing capture systems that are primarily paper-based.

Step 4. Document classification

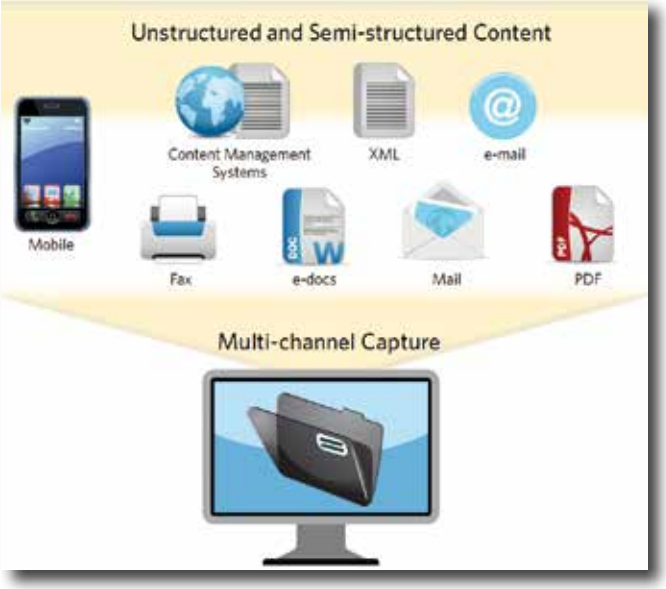
The next step is the classification of a document. For paper, this replaces the sorting of incoming mail, where Larissa previously placed documents into bins for claims, receipts, new contract applications, and so on. In a computer system, these bins are folders.

There are roughly four methods of classifications, and these are sometimes combined:

• **Symbolic -** such as barcodes, is the easiest and most accurate. It typically applies to paper and fax sources, but not to e-mail and e-docs.

• **Graphics-based document analytics -** work like a human visual categoriser, classifying documents by looking at their appearance but not reading text. For paper-based workflows, this is typically used for semi-structured type documents like invoices, where the document type is known.

• **Graphics- and text-based keyword combined -** typically combined with graphics-based analytics to add simple text rules. Example: when graphics says it is an invoice, and keyword says to look for the words "car repair," there is a high confidence about the classification. However, this process requires scripting and lacks flexibility.



• **Full, text-based document analytics** - the most recent and complex form of classification and the most versatile, as it classifies all text-based inputs - including OCR'd scanned paper, e-mails, e-docs and social media content.

A simplistic way of looking at the maturity of technology is to look at documents in three classes: structured forms, semi-structured documents and unstructured documents.

Start with structured forms, low in complexity with no variability. Forms are typically designed by the company, hence there is no need to classify the specific document type.

Next are semi-structured documents, such as invoices where the forms are of the same type but each vendor provides a different variation. Technology for the classification is typically graphics- and text-based, and processing of these documents, invoices in particular, is now also quite mature.

Unstructured document processing began a decade or so ago, yet remains a major challenge. Complexity and variability is extremely high and requires a new approach to classification. A small set of classes can be handled by rules and keywords but a more complex set requires text-based advanced classification techniques and algorithms that have been introduced as part of Machine Learning Science. These advances have arrived within the past five years, but most companies are still only applying classification based on scripted rules, like keywords.

Step 5. Data extraction

This is when information is derived via extraction of metadata from each document. This step replaces manual data entry and helps eliminate potential human errors. In our insurance example, knowledge worker Larissa receives the invoice from customer Jim for the repair of his car, but now needs to answer questions, such as: what claim does this relate to? What is the amount? It's easy to see that this requires a time-consuming effort that slows down the handling of the claim significantly.

Many vendors now tout self-learning – it's a new buzzword. However, what they often mean is that they make their rules a bit more adaptive, rather than using semantic understanding and machine learning.

Fuzzy understanding is part of best-of-breed solutions, because you cannot always take data literally. OCR makes mistakes. E-mails and documents can have misspellings. Few vendors offer fuzzy understanding, based on degrees of truth rather than absolutes.

Validation systems function similarly to a database lookup, validating a two-way match with the database system. Here, fuzzy understanding is still needed as the database may also contain errors, such as misspellings, duplicated entries with small variances, etc.

As an example: Larissa enters a claim number, insurance number, and customer name and address. With this information, the correct record can be found in the insurance system and validated.

If the data extraction system is not certain enough, the document needs to go to a validation station where Larissa will validate the data extracted. Some advanced systems also learn from validation input.

Step 6. Document collaboration

"Search-ability" and "share-ability" were noted as key reasons for document digitization by survey respondents in Step 1. These same aspects are critical for multi-source documents. As Gartner Research states, "People don't want computers. They want to relate, share, communicate, enjoy, learn, discover, analyse and create." And they want to optimise the power and value of their documents and knowledge wherever and whenever – on any device ranging from laptop to tablet to smartphone, and new hybrids to come.

Revisiting the insurance scenario: customer Jim may be able to see his case on a portal, then upload a video to support his claim via the Content Management System. Dave, the insurance agent, could come to Jim's house and review and edit the case document set on his iPad at Jim's kitchen table. Now everyone has access to the same up-to-date content and information. This is practical, powerful, and offers significant time- and dollar-saving benefits.

Step 7. Automate business transactions

Documents with meaningful metadata – residing in a powerful Content Management System – allow automatic triggering of business workflows, and make information actionable.

In our insurance example, once classified, the document will be automatically assigned to the claim case and the workflow can check for completeness of the document set, initiating communication with customer Jim to request a missing form. Similarly, an insurance claim approval workflow can be automated to interact with the insurance system and enable appropriate payment. Just imagine how this will greatly reduce time involved in handling the claim!

And that's just the beginning. Combine an intelligent document and a modern ECM solution with workflow capability, and the applications and advantages multiply.

Step 8. Automate with advanced insight

With an intelligent document capture system feeding content and metadata into a Content Management System, tasks that previously required manual intervention are now automated for knowledge worker Larissa, thanks to scripted rules-based workflow. So what happens when the multi-source system receives an e-mail from customer Jim to Larissa with an address change? It's actually a difficult problem to detect an address change in an e-mail, as there is no validation record and the e-mail may contain both old and new addresses. Thanks to intelligent data extraction, the address change triggers a scripted workflow to correct the address field in the insurance company's database.

To add another level of advantages, enable the Content Management System with a Knowledge Management System featuring analytics capabilities for big data. Now the Knowledge Management System explores multiple content systems – including social media – and discovers competitive information about Jim's new community showing that a competitor is very strong in that region. This creates an alert that's sent to Charles, the insurance agent near Jim's new address, who calls Jim to make sure he is happy with his coverage, and to proactively pre-empt a competitor's sales approach.

This is state-of-the-art advanced intelligence at work, as all of these conditions and variables could not be scripted. Today, using Business Intelligence on structured data (a database) is becoming current, but using it on unstructured data is the future and can only occur via intelligent document understanding.

Wisdom lets you turn knowledge into predictive analytics to help drive your business, create new opportunities, and streamline processes. Larissa now benefits from all these advantages – spending less time doing data entry and case management. She's more involved with customers and better understands their evolving needs. Now she's become a proactive knowledge worker, with the time to focus on sustaining and building business and relationships. And her insurance company employer is delighted because meaningful time and money savings are being achieved, relationships are being enhanced through greater customer satisfaction, and multi-source data is far more aggregated, meaningful, and accessible.

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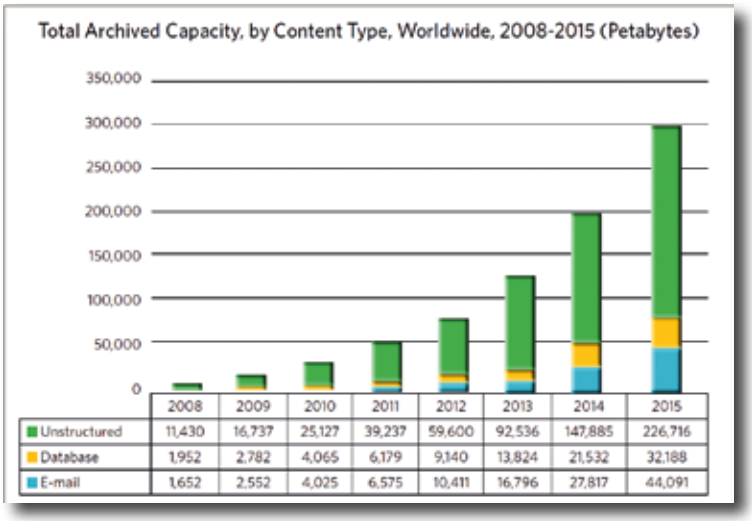


	2008	2009	2010	2011	2012	2013	2014	2015
Unstructured	11,430	16,737	25,127	39,237	59,600	92,536	147,885	226,716
Database	1,952	2,782	4,065	6,179	9,140	13,824	21,532	32,188
E-mail	1,652	2,552	4,025	6,575	10,411	16,796	27,817	44,091

Business turning cost centres into value centres with automation

By Rob Barrow

Back office operations are the backbones that keep your business running smoothly, but many, like Account Departments, are generally not known to be leaders in process efficiency, nor on the cutting edge of innovation. The key drain on efficiency is the need for paperwork in hard copy. Operations like accounts payable, accounts receivable, invoice and expense processing can be quickly buried under a flood of paper.

It's also known to be a part of the business that, while keeping the front office functions running, is a significant business expense. Related to that is the fact that in general, the bigger the company, the bigger the back office requirements so the higher the cost centre becomes.

Countless industry articles and research papers refer to poorly managed back office departments as one of the keys to business failure. Efficiency and accuracy are central to an effective accounts department for instance, but it can prove difficult when companies are dealing with more and more information every day. The more information people have to deal with, the more likely we are to make errors when processes are manual.

But that doesn't need to be the case. Smart businesses are starting to take advantage of automation, with a slew of innovative technologies an process improvements now available to help back office functions deliver a greater ROI to their own business. At the same time, they're driving higher accuracy and greater productivity, usually with a lower headcount requirement. In many cases, they're coming out cost-neutral and in a few cases where implemented well, they're even turning into value centres.

Electronic capture is a great example of automating a process to raise accuracy levels with scanning and OCR, and increase productivity dramatically by reducing data entry. In the invoice processing area for instance, companies are experiencing improved cash flow simply by automating accounts payable with intelligent capture applications. Scanned invoices can be indexed into a workflow for approval and synced with a company's ERP and accounting software.

Expense processing is another area where automation can benefit the back office. Employees can capture their receipts digitally via their smartphone camera, send them to the office, where they're processed and bound electronically to matching reports in the company's financial software.

From an overall company perspective, these automated processes help the engine of your business run smoothly because workflows and processes are tighter and more efficient.

Some well-known global organisations have benefited significantly from using automated processes like intelligent electronic capture of information.

Global giant Siemens automated its accounts payable system in 2011 as part of a global "finance bundling" project. The reason for change was based on two key drivers: 1) its commitment to achieving the highest possible quality for clients, and 2) the cost to maintain, improve and train staff on many different platforms is time consuming and expensive.

In Germany alone Siemens operates off 50 (largely SAP) platforms and has 45,000 suppliers in scope. Siemens' goal was to move from 400 finance delivery centres around the world to just 10. As a result, Siemens is achieving continual process improvement on centralised platforms, hence transforming the accounts payable function, saving money, reducing headcount and raising productivity.

With the automation of almost 3 million invoices for its German units, Siemens aims to reduce its cost base by 40 per cent, reducing time to process an invoice by five days, and enabling capture of 100 percent of early payment discounts.

Anixter International, a leading global supplier of communications and security products, and electrical and electronic components, benefited so greatly from automating processes that it won an award for it.

Recipient of the 2013 Huntington Innovation Award, given out by the Institute of Financial Operations for achievements in accounts payable innovation, Anixter now processes 1.8 million documents per year, capturing 95 percent of all invoice data automatically, 92 percent of PO invoices, 74 percent freight invoices and 98 percent expense utilities, hands-free. Paper usage has also decreased by 38 percent. As a result, the company experienced a 100 percent ROI on initial costs associated with the intelligent capture solution in the first year.

> "Smart businesses are starting to take advantage of automation"

The Walt Disney Company is another example of a global business automating processes for significant business benefit, winning the Huntington Innovation Award in 2012. Disney's Accounts Payable shared services department changed from being a transactional department, to becoming an analytical, value-added service provider, going beyond a cost centre and becoming a profit centre.

The Walt Disney Company's Shared Services in Orlando receives nearly six million invoice documents per year, of which over 90 percent are now captured electronically – a process currently being rolled out to other parts of its corporation to provide meaningful, high-impact business improvements. Disney now enjoys reduced payment cycle times, increasing the number of invoices processed per full-time employee per year from 38,000 to 83,000. The results – improved customer service levels and a higher customer satisfaction rate.

The clear business benefits generated by automating back office processes make it worth the time to investigate. With market competition growing and local market pressure rising daily to decrease costs and add value, business managers need to examine the solutions available to improve ROI, accuracy, productivity and add value to the business.

By freeing staff from the grind of data entry, accounts teams can focus on further improvement strategies. With transactional data available immediately, management can spot trouble areas and deficiencies quickly. Compliance can be ensured and statistics are available at any time.

The question businesses need to ask themselves is not whether automation is affordable, it's can you afford to not do it?

Rob Barrow is Regional Director, ANZ at Perceptive Software.

Are Data Governance Tools Ready for Data Governance?

By Michele Goetz, Principal Analyst, Forrester Research

An IT mindset has dominated the way organizations view and manage their data. Even as issues of quality and consistency raise their ugly head, the solution has often been to turn to the tool and approach data governance in a project oriented manner. Sustainability has been a challenge, relegated often to IT managing and updating data management tools (MDM, data quality, metadata management, information lifecycle management, and security). Forrester research has shown that less than 15% of organizations have business lead data governance that is linked to business initiatives, objectives and outcomes. But, this is changing. More and more organizations are looking toward data governance as a strategic enterprise competence as they adopt a data driven culture.

This shift from project to strategic program requires more than basic workflow, collaboration, and data profiling capabilities to institutionalize data governance policies and rules. The conversation can't start with data management technology (MDM, data quality, information lifecycle management, security, and metadata management) that will apply the policies and rules. It has to begin with what is the organization trying to achieve with their data; this is a strategy discussion and process. The implication - governing data requires a rethink of your operating model. New roles, responsibilities, and processes emerge.

To date, data management technology has attempted to address these new roles, responsibilities and processes by focusing on the intersection of subject matter experts for data policies in the business and how to implement these in an automated and scalable fashion. That is table stakes and not enough. Managing data is like managing another aspect of your business. Marketing and Sales have CRM applications. Finance and Operations have ERP applications. Product management, Engineering, and Manufacturing have product lifecycle management application. Data Governance requires its own application because the processes, tasks, coordination and oversight require the same type of discipline, consistency and sustainability as other operations.

Vendors are beginning to wake up to this new reality of what Forrester sees as Data Governance 2.0 - business ownership, business strategy, and emphasis on business outcomes. New capabilities are being introduced, and some new vendors are stepping in. While early, along with my colleague Henry Peyret, we conducted research on what tools and solutions are available that support the administrative and strategic aspects of data governance. The result - *The Forrester Wave, Data Governance Tools Q2 2014* is out.

Here are some key take-aways from the research:

- Vendors are still married to the legacy of data management owning and running with data governance focusing capabilities toward tactical data governance
- No single data governance tool manages across all five data governance pillars (MDM, data quality, ILM, metadata, security) - although some vendors (IBM, Informatica, SAP) can with significant integration between products.
- Only two vendors (Trillium Software, SAP) provided data governance metrics that linked data conditions with actual business outcomes (regulatory risk, total cost of ownership, etc.)
- Only one vendor (Collibra) has an in market tool that provides a data governance 2.0 environment specifically for strategic data stewardship and operations

Significant product innovation is coming (from more application like tools to better user interfaces and reporting) that will lift data governance management out of IT and into the hands of the business. While IBM, Informatica and Collibra lead in strategy, others such as Information Builders, SAP, SAS, and Trillium Software are introducing specialize capabilities that will make them stand out (industry and regulatory specific, better reporting and audits, improved business support, etc.).

This is an emerging market; we expect the data governance tool landscape to shift sharply in the coming year with those in the Leader category potentially facing stiff competition, and the potential to see consolidation, acquisition, and new companies emerge. What you should know when considering data governance tools?

There is no single solution, but data quality, MDM and metadata management often are tightly connected to govern across.

Identify tools that enforce best practices for the administrative aspects of data governance - keep in mind the end user is the business and may not be a "data geek".

Look carefully at what it takes to connect data conditions and processes to business outcomes as this effort may be a BI on Data project.

Understand the vendor roadmap - choose those that have solid strategies and prototypes/early releases geared toward the strategy, process, and administrative aspects of governance, not just data management and data processing.

Information Governance: treating information as a valuable resource

By Kevin Hayes

In the era of Big Data (or Big Content), intellectual property can be the most important business asset. Further, we are witnessing the ever-mounting burden of regulatory compliance, new legislative changes (i.e. Data Privacy Laws) and public scrutiny of regulated industries including the financial services, government, energy and resources sectors.

With the increasing volume, variety and complexity of information entering day-to-day operations, what is becoming obvious to CIOs is that new approaches are required in order to manage and consume this information.

While information may be a company's greatest asset, it has become apparent that the term "records management" (RM) has a somewhat broad connotation and executives are unsure in investing in RM initiatives, without a defined payback.

From our experience, it typically takes some compelling event to drive a major transformation business initiative — either a massive drop in revenues or market share, a disruptive competitor entering the market, an accident or a legal law suit.

Today, it is hard to imagine that there is any executive — or employee, for that matter — who doesn't recognise the value of information in their day-to-day operations. Many organisations recognise the need to improve their business processes, yet operate at a tactical level in making changes across their value chain.

What is sometimes required is to take a strategic view across a company's supply chain and establish what new approaches are required from an EIM (Enterprise Information Management) perspective. The payback may result in elevating the brand as organisations find new ways of communicating with customers or delivering a higher level of service.

Information has value, and when properly managed, information can reduce risk as well as positively impact your overall revenue, efficiency, and profitability. When effective information management is embedded in the processes and activities that your organisation performs in the course of normal operations, you are able to achieve increased compliance and realise the strategic value of that information.

This is where Information Governance comes in. It more accurately reflects the paradigm shift we've been experiencing over the past 20-30 years, as electronic information in its many forms, has replaced antiquated practices and tools rooted in paper-based processes.

Information Governance goes beyond just corporate records. It is about effectively managing a myriad of information across the entire value chain to gain greater business insight and impact. If implemented correctly, Information Governance will help organisations improve their operational excellence, ensure compliance, and achieve operational risk management.

The right Information Governance platform will provide the foundation to link the different data silos together, in order to extract the value in the information across the various business units. It requires a multi-pronged Enterprise Information Management (EIM) approach that combines and leverages document management, records management, web content, workflow processes to maximise the value of business data.

As an example, managing hundreds of thousands of design documents for huge capital projects in the energy industry can be challenging for the teams involved without the correct data management processes in place. In addition to the sheer amount of documents to control, they also need to ensure adherence to regulatory compliance, minimise mammoth threats to budgets and maintain schedules.

What's more, when a company is investing billions, they need to get to first production as soon as possible. Yet economic pressures are forcing energy companies to do more with less, and therefore having an abundance of document controllers with Excel spreadsheets is not an efficient use of time or resources.

It all ends up putting incredible pressure on the project teams to optimally manage, store, and deliver approved design documents to the construction team the instant they're needed.

When proper controls are not consistently enforced, this pressure can lead to unapproved, or even rejected, drawings being sent to construction. From an article in the Institution of Mechanical Engineers' magazine PE: *"The Institute of Document Control (IDC) reported that a survey of 200 of its members revealed that most (62%) had worked on at least one project where there were critical safety issues because of poor control of documents. One instance highlighted several critical safety elements of a land-based petrochemical facility which was inadvertently built to specs defined by rejected drawings."*

That's why many energy companies are looking to enterprise wide ECM solutions. These centralised solutions manage a single point of truth across the extended enterprise - and throughout the total lifecycle of an asset - ensuring compliance while reducing risk and speeding time to completion.

Evidently, organisations across all industry sectors face a range of information management issues and challenges, including regulatory compliance, efficient access to and handover of key documents, accelerating operational output and returns, and knowledge sharing and collaboration.

What is sometimes required is to take a strategic view across a company's supply chain

We are witnessing the use of broad-based, integrated, ECM-based systems and tools to meet these challenges, particularly in industries such as the energy sector that has traditionally used manual or point solutions to handle document management, access and control.

It must however grow because integrating content with the full range of capital projects and EAM business processes - from project management to supplier information to material management - is the foundation for meeting many of the challenges companies currently face.

Regulatory compliance capability, for example, is significantly enhanced when content lifecycles are transparent, current and accurate. Moreover, broad process-content integration, where content is updated and aligned as business and management processes are executed, means risk management becomes more embedded into existing enterprise management platforms.

Only then, will companies maximise the return on its most important asset - information - and save time and money in the process.

Kevin Hayes is Vice-President A/NZ at Open Text

CIOs unprepared for "Digitalization" says Gartner

Digitalization, the third era of enterprise IT, is beginning, but most CIOs do not feel prepared for this next era, according to a global survey of CIOs by Gartner, Inc.'s Executive Programs. The survey showed that many CIOs feel overwhelmed by the prospect of building digital leadership while renovating the core of IT infrastructure and capability for the digital future. The survey found that 51 percent of CIOs are concerned that the digital torrent is coming faster than they can cope and 42 percent don't feel that they have the talent needed to face this future.

"2014 must be a year of significant change if CIOs are to help their businesses and public sector agencies remain relevant in an increasingly digital world," said Dave Aron, vice president and Gartner Fellow. The worldwide survey was conducted in the fourth quarter of 2013 and included 2,339 CIOs, representing more than $US300 billion in CIO IT budgets in 77 countries.

During the first era of enterprise IT, the focus was on how IT could help do new and seemingly magical things - automating operations to create massive improvements in speed and scale, and providing business leaders with management information they never had before. The last decade has represented the second era of enterprise IT, an era of industrialization of enterprise IT, making it more reliable, predictable, open and transparent. However, while this second era has been necessary and powerful, tight budgets and little appetite for risk left scant room for innovation. Entering the third era of enterprise IT technological and societal trends, such as the Nexus of Forces and the Internet of Things, are changing everything; not only improving what businesses do with technology to make themselves faster, cheaper and more scalable, but fundamentally changing businesses with information and technology, changing the basis of competition and in some cases, creating new industries.

"2014 will be a year of dual goals: responding to ongoing needs for efficiency and growth, but also shifting to exploit a fundamentally different digital paradigm. Ignoring either of these is not an option," said Mr. Aron.

"The behaviours mastered in the second era of enterprise IT, like treating colleagues as customers, are potential hindrances to exploiting digitalization," said Graham Waller vice president and executive partner for Gartner Executive Programs. "In 2014, CIOs must face the challenge of bridging the second and third eras. They have to build digital leadership and bimodal capability, while renovating the core of IT infrastructure and capability for the digital future."

"CIOs are facing all the challenges they have for many years, plus a flood of digital opportunities and threats. Digitalization raises questions about strategy, leadership, structure, talent, financing and almost everything else," said Mr. Aron. "All industries in all geographies are undergoing digital disruption. This is both a CIO's dream come true and a leadership challenge."

Most businesses have established IT leadership, strategy and governance but have a vacuum in digital leadership. To exploit new digital opportunities and ensure that the core of IT services is ready, there must be clear digital leadership, strategy and governance, and all executives must become digitally savvy. Indeed, the 2014 CIO Survey shows that the CEO's digital savvy is one of the best indicators of IT and business performance.

"IT spending, portfolio balance and the choice of technologies, talent, sourcing options, leadership, structure and governance must all be designed to make the business win. However, despite the need to grow, there is pressure on IT budgets," said Mr. Aron. "The survey showed CIOs expect their IT budgets to remain essentially flat (increasing 0.2 percent on average) in 2014. This is especially challenging since there is a need to both renovate the core of IT systems and services, and exploit new technology options."

CIOs report that a quarter of IT spending will happen outside the IT budget in 2014 - and that is the spending they know about; the reality may be significantly higher. This is a direct result of the new digital opportunities that are more entwined with customer and colleague experiences, and that may, in some cases, reflect concerns that the IT organization is not fast enough or otherwise ready for more digital opportunities.

"There is an inherent tension between doing IT right and doing IT fast, doing IT safely and doing IT innovatively, working the plan and adapting," said Mr. Waller. "The second era of enterprise IT has been all about planning IT right, doing IT right, being predictable and creating value while maximizing control and minimizing risk. However, to capture digital opportunities created by the third era, CIOs need to deal with speed, innovation and uncertainty."

In order to deliver on this bimodal future, CIOs are planning for significant change in 2014 and beyond:

• A quarter have already made significant investments in public cloud, and the majority expect more than half of their company's business to be running over public cloud by 2020.

• Seventy percent of CIOs plan to change their technology and sourcing relationships over the next two to three years, and many are seeking to partner with small companies and startups.

• Forty-five percent of companies have implemented agile methodologies for part of their development portfolio, although most need to go further to create separate, multidisciplinary teams, with lightweight governance and new, digital skillsets and alternative sourcing models.

Retiring legacy applications with TRIM

Retirement may be an ending, but it can also offer the promise of a new beginning. This was certainly the hope held out by Tasmania's Retirement Benefits Fund when it chose to retire a set of legacy applications and host all the data instead in its TRIM EDRMS.

The 100 strong organisation has managed superannuation for Tasmanian Public Sector employees since 1904 and currently manages over $A4.8 billion in investments

Following the retirement of multiple legacy in-house applications it has now moved to a single outsourced application to manage the administration of the fund, while migrating the legacy records from these applications into TRIM, which also enables RBF to manage the retention and disposal of records.

Damien Hill, Senior Systems Consultant with the Retirement Benefits Fund, said, "We now have one single application with a familiar interface and search methods.

"Users didn't have to be experts in the legacy applications to find data. All historical member records are in the one place and TRIM is firmly embedded in the organisation."

There were many good reasons for wanting to retire the legacy applications, which were no longer supported and with a level of customisation that would have required significant effort to upgrade.

The main fund administration system, RBFSAS, would have required a spend of over $A400,000 to update its infrastructure and database. Updating other enterprise applications to more modern web based programs was also going to require a significant investment.

RBF also had a desire to upgrade and consolidate its server environments and databases. Following outsourcing of member administration services in 2011, most of the member administration functions were no longer being done in-house and the outsource provider had more up to date and scalable systems to handle the ongoing changes to meet the needs of managing superannuation in the current and future environment.

"We had a mixed environment that was becoming difficult and costly to maintain", said Hill.

RBF Legacy Applications

- **RBFSAS (in-house superannuation administration system – dating from 1994 and the largest and most complex system used to manage all of the superannuation and member related data.**
- **CHRIS – an older and customised version of the now named CHRIS21 payroll system which was used to manage and pay pensions to retired members.**
- **AWD (member workflow system) – this was the application used to manage all correspondence and contact with members and assisted RBF to manage workflow internally.**
- **Historical Member Statements (web based system).**

Australian solution provider Kapish had come on board with the RBF in 2010 to update the organisation's TRIM EDRMS and implement integration with a SharePoint intranet. So with plans to outsource its legacy application to an outsource provider, RBF turned to Kapish for a solution to integrate its application archives within TRIM.

"This project was a great opportunity for Kapish to work closely with RBF to design a solution that leveraged the existing investment in TRIM. It's clear to see from the success of this project that TRIM is a real solution for legacy data management, including application end-of-life solutions. This project showcased how such a simple design can be so intuitive for users, and provides the business with ongoing value and direct access to this information, while meeting regulatory and compliance obligations", said Jon-Paul Williams, Director of Kapish.

Although the legacy applications were no longer required for operational purposes, the information contained within them was required as the new outsourced administrator planned to only take around two years of historical information.

RBF also had some obligations to be able to respond to the administrator when questions arose relating to past transactions, and also to meet legal, record-keeping and fiduciary requirements.

The migration challenge was immense: over 170,000 individual member files to capture equating to more than 500GB of data in nine million unique rows. It also included more than 600,000 PDFs.

Prior to the start of the project, Kapish migrated RBF to TRIM v7.2 and it has since moved on to v7.3. The project to transition data across to the new outsourced provider and decommission the legacy applications took 12 months to complete.

To ensure the process adhered to the necessary record-keeping requirements, the RBF liaised with the Tasmanian state government Archives Office to gain their endorsement, with due consideration given to the publication: Tasmania Recordkeeping Advice No 18 – Recordkeeping Requirements within Business Information Systems

It was decided the best approach would be to tie all of the information together by member number, a unique identifier that was used across all of the applications.

"We also thought that once you found the parent container it would be good to then be able to browse through all of the information relating to that member," said Hill.

"We also wanted to be able to identify the source of the data so we created record types, one for each application, and imported the data into a folder structure for each member."

A new standalone TRIM dataset was created that contained just the imported member data, and this was made read-only and access restricted.

The migration process required careful attention to ensure that data did not change.

"The most difficult and time consuming part of the project was

extracting the data. From each of the systems, we had to get assistance from vendors and we leveraged internal resources to extract the data and prepare it for Kapish to import," said Hill.

"There were some technical issues with this earlier on in the project but the Kapish guys really did take control of the situation and provide a solution that would ensure the data could be imported in the timeframe we agreed upon".

"Once we handed the data over to Kapish, they were able to develop scripts and do the necessary magic to import the data into a SQL database, then import these records to TRIM into the desired structure".

The entire migration took around 12 months, after which a QA process was undertaken to check that information from each application had been correctly migrated.

"All applications and servers for these legacy applications have now been decommissioned and TRIM is where we can now find all of this data," said Hill

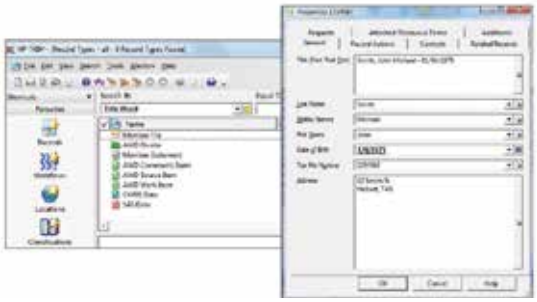
"RBF originally requested that the proposal include the development of a custom-based Web front end to help users with searching, but once the staff used TRIM they found it easy to navigate and use the imported structure designed by Kapish, and we decided not to proceed with this part of the project."

"Training was minimal as users were already familiar with TRIM. Users only have to know how to search on member number using Record Number search and how to switch between data-

> "We had a mixed environment that was becoming difficult and costly to maintain"- Senior Systems Consultant Damien Hill

sets, as most users were already aware of how to search. In some cases, the training only lasted 15 minutes to show them how to switch over to the dataset, search by member number and explain the record types.

"We also created a two page "cheat sheet" that had everything they needed to get going. Our users love the fact they don't have to switch between multiple systems or remember different passwords!"



Mapping legacy records to TRIM containers.

The preview capability of TRIM has also saved RBF users a lot of time viewing multi-page PDFs and TIFFs, as this was not as easy to do using the old applications, as users could only open and close the files to view.

Many times it was necessary to print from legacy systems because it was difficult to view the files.

"Since the TRIM viewer is so easy to use, we have experienced a significant reduction in our printing which has assisted with our overall Paper Reduction Strategy.

"Also, we did not have any sort of retention capability in the previous systems. We did not have a retention schedule ready at the time of migration, but have since had this approved by the Tasmanian Archives Office.

"Now that all of the data is in TRIM, we plan to apply our new schedule to these records and obviously using TRIM is going to make this process a whole lot easier."

RBF is currently working through a disposal program focusing on applying retention to exited member files. A lot of the data in some of the legacy applications was scanned and still exists in hard copy. The new TRIM database is providing the capability to manage and destroy these hard copy records.

The success of this project has been so well received by RBF and its staff, that we are now considering TRIM as the primary system to use for future Legacy Application and End-of-Life data migrations, to provide added business value by continuing to access this information and manage the long-term retention and disposal of business records.

Fugro implements AP Smart for workflow automation

AP Smart has been chosen to streamline the purchase requisition, procurement and Accounts Payable processes at Fugro TSM and Fugro Survey, global subsea contractors servicing the oil and gas and marine industries with offices in Perth and Brisbane.

An existing customer with Microsoft Dynamics partner, UXC Eclipse, Fugro recently selected AP Smart to offer a web-based purchase requisitioning and approval process.

Fugro TSM and Fugro Survey, operating companies of Fugro Group, currently utilise Microsoft Dynamics NAV as their enterprise resource planning (ERP) solution. Recognising the need to introduce an automated data capture and invoice-to-PO matching from incoming invoice, Fugro TSM and Fugro Survey approached their Microsoft Dynamics partner, UXC Eclipse, to recommend a third party solution that tightly integrated with Microsoft Dynamics NAV and was easy to use.

UXC Eclipse recommended AP Smart. A Microsoft Dynamics NAV certified solution, AP Smart has been developed by ReadSoft and ExFlow (SignUp Software) combining their expertise in document processing and automation. AP Smart helps organisations reduce business costs and improve efficiencies as it captures, extracts and integrates data from invoices and other documents into Microsoft Dynamics NAV.

AP Smart offers customised approval workflows that can be configured to meet current business practices and process, as well as enables organisations to automate an array of processes, including Accounts Payable, Accounts Receivable, Time Sheets and any other document that requires manual data entry.

"We were introduced to AP Smart a number of years ago as it is used by the Fugro Group worldwide. We were impressed with the solution, but we put the implementation on hold. When UXC Eclipse approached us about their partnership with SignUp it gave us an opportunity to revisit AP Smart and work with local UXC Eclipse and SignUp staff to implement the system," said Melissa Cochran, Accountant at Fugro Survey in Perth, WA.

Once implemented, AP Smart will significantly streamline the purchase requisition, procurement and Accounts Payable processes, eliminate the risk of manual data entry errors, and reduce time and effort across the Accounts Payable and procurements teams. Fugro TSM and Fugro Survey will also increase visibility and control over their procurement and ordering process and increases accountability across the team.

"As our long standing Microsoft Dynamics NAV partner UXC Eclipse we were comfortable with UXC Eclipse's recommendation to have a closer look at AP Smart to improve our AP processes. After several product demonstrations we determined that AP Smart was going to offer a significant ROI to our business," said Joseph Jeevaraj, Financial Accountant, Fugro TSM Pty Ltd.

Fugro TSM provides fully integrated services combining Dynamically Position vessels, Subsea equipment, personnel and engineering services. Fugro Survey provides Marine Survey services including the study, mapping and analysis of both subsea environmental conditions and ocean territories.

ReadSoft wins NSW Education deal

The New South Wales Department of Education and Communities, the largest single organization, public or private, in Australia, has chosen ReadSoft's SAP -certified invoice automation solution to streamline its existing invoice processing operations and enable greater efficiencies across its Shared Services Centre.

The contract is recurring revenue based and the Agency plans to process 4.7 million invoices over an initial term of over 3 years. The deal was signed during the second quarter of 2014 and includes options that may stretch the term to 10 years. The annual fee based contract is based on an actual volume of invoices processed. This allows the transition to a more efficient invoice processing system and match the savings to costs without major capital investment. The implementation will deliver the full PROCESS DIRECTOR for Accounts Payable solution and Performance Analytics to the Agency's shared services centre, to reduce invoice processing cycle times, drive cost benefits through centralisation, and improve visibility and control.

A Kodak scanning solution will deliver financial data after 3-way matching with ongoing document storage in HP TRIM and electronic workflows for approval and discrepancy detection.

The solution is initially being deployed to the Department of Education and Communities corporate headquarters, TAFE institutions and 200 NSW schools. However it could eventually be rolled out with SAP to more than 2000 public schools with the adoption of shared services across the state.

"This is a truly impressive win that reinforce both our leading position within invoice automation and our recurring revenue strategy," says Per Åkerberg, President and CEO of ReadSoft.

"Our solutions are equally favourable to private businesses as they are for the government sector and invoice automation offers an opportunity for all sorts of organisations to streamline processes with technology that is integrated into existing ERP systems, yielding long-term efficiency gains," he said.

Xcellerate IT wins 5 major councils

Solution provider Xcellerate IT has helped five Australian local government organisations migrate to an automated accounts payable platform in recent months, integrating the Kofax Capture platform with TechnologyOne Financials suite. The five councils are: City of Yarra, VIC; Salisbury City Council, SA; Auburn City Council, NSW; City of Sydney, NSW; and Toowoomba Regional Council, QLD

"We are very proud that Xcellerate IT's unmatched delivery of the Kofax Capture platform as well as its unique knowledge of the AP operations within local councils is recognised by the market," said Howard Boretsky, Managing Director of Xcellerate IT.

"We look forward to working with our new clients and empower them to gain greater efficiencies across the Accounts Payable Department. Thanks to these new five entries, our local council user community counts now up to 20 councils across Australia".

PSIGEN unveils PSI:Capture V5.1

PSIGEN Software has launched v5.1, the latest version of its flagship document capture product, PSI:Capture, with enhancements to the EasyAP offering to simplify and accelerate the processing of accounting documents. The key core module in v5.1 is the Table Extraction Module, which automatically identifies and extracts invoice line item table data. Along with this module, additional features have been added to PSIGEN's Classification Module to provide enhanced accuracy and automation in form and document identification.

"Our Accounts Payable solution has had fantastic traction in all markets. Businesses are looking for an affordable, efficient solution," said Bruce Hensley, of PSIGEN. "In 5.1, we have taken all the feedback from our customers and partners, and really taken our product to the next level when it comes to invoice processing. We created an AP Automation product that is simple to configure, and takes minimal time to get to production."

"AP Automations continue to be in high demand in our Asia Pacific region and it is very important to us that we are providing a robust and effective solution to our partners for their AP Invoice implementations" said Steven Chenery, CEO for Asia-Pacific distributor UpFlow. "With the latest release, PSIGEN have once again delivered a framework that will improve the lives of the end users and provide a quick ROI to the business."

The release also has 60 new features and enhancements that focus on simplified configuration, workflow auto-processing and enhanced data extraction accuracy.

www.upflow.com.au

What's the difference between document and records management?

By Renee Floyd

Separately, document and records management seem straightforward enough, but what happens when you put them side-by-side? While these terms have some overlapping characteristics, there are crucial distinctions that make each practice essential for your organisation's success.

Below are definitions of each term, followed by the three key characteristics that distinguish these practices from one another.

Document management involves the day-to-day capture, storage, modification and sharing of physical and/or digital files within an organisation.

Generally speaking, document management focuses on:

- Reducing lost and misfiled documents.
- Providing faster search and retrieval of documents.
- Helping to better organise existing documents.
- Improving general work processes & organisational efficiency.
- Reducing the amount of physical space used to store documents, such as file cabinets, boxes and shelving.

Records management establishes policies and standards for maintaining diverse types of records. Some, but not all, documents within an organisation become records.

Records management includes the functions of document management described above, plus:

- Identifying what records exist by records inventory.
- Applying required retention periods to stored items.
- Identifying the owner of each records series.
- Determining that a chain of custody and a proper audit trail both exist.
- Assisting in e-discovery issues and applying legal holds to records when needed.
- Managing disposition (disposal of documents).
- Developing and administering defined records policy and procedures, regardless of if the records are electronic or paper.
- Preserving records throughout their life cycle.

What makes document and records management different?

These terms differ in three main ways:

Goal: the purpose of each practice.

Information: the content involved in each practice.

Methodology: the way each practice is performed.

Let's break these distinctions down further:

1. Goal

The goal of document management is efficiency. Approving documents faster, reducing manual data entry and automating recurring tasks are some of the many functions of document management that work toward this goal.

On the other hand, the goal of records management is compliance. A well-oiled records management system helps organisations avoid penalties when regulators, auditors and other governing bodies come calling.

Document management and records management do share a goal of business continuity. Shortcomings in either practice can contribute to the downfall of the entire organisation.

However, when both document and records management work toward their goals (efficiency and compliance), the longevity of the organisation becomes more secure.

2. Information

The information of document management is comprised of transient content. Invoices are signed and then sent off to the next approver; older drafts are discarded for revised ones; forms pass from submitter to reviewer and so on.

Meanwhile, the information of records management is comprised of historical content. The status of a document is determined by different phases of the records lifecycle, as the various drafts, versions and copies of active documents are consolidated into what is only essential for the purpose of compliance.

In short, workers need documents to do their jobs—but they need records to prove they did their jobs.

3. Methodology

The methodology of document management is content-driven. As mentioned above, content is the catalyst for all document-related activity. Therefore, document repositories are usually organised with the needs of general users in mind: finding documents by keyword or title, keeping all documents together by employee or project, etc.

In contrast, the methodology of records management is context-driven. Records managers care more about document types (insurance records, employment applications etc.) than the words written on the actual documents.

As a result, retention schedules are the catalyst for records-related activity, as different types of records must be kept for different lengths of time, and under different conditions.

Renee Floyd is a writer at ECM vendor Laserfiche. http://www.laserfiche.com

Business Best Practice: Top 5 tips to optimise Customer Order Processing

By Emmanuel Olivier

Let's get straight to the point: A company's success begins and ends with its customers. And one of the most important components of customer satisfaction is the effectiveness and efficiency of business document processing. Today more than ever, optimising business processes within the order-to-cash cycle is central to improving overall performance and gaining a competitive edge.

This may seem obvious, however, it's still one of the most overlooked facets of business process improvement. In the order-to-cash process, customer order management is a key activity. An order accurately processed and within the promised time means a satisfied customer who will pay its invoice on time.

Here are the top five practices to optimise order processing and improve customer satisfaction:

1. Simplify, track and measure

Typically orders arrive by fax, email, telephone or even EDI. With the complex reality of multi-channel customer order-taking process, there is no easy way to provide a single view of the order management process.

For example, an inquiring customer may call to find out the status of an order, or the Financial Director may want to know how many remaining orders are still to be processed before the end of the day. Unfortunately, these questions cannot be answered when the orders are on a fax machine somewhere, buried in an email inbox or in a mail in-tray waiting to be sorted.

Every day, the lack of process workflow visibility affects customer satisfaction, restricts service productivity and, ultimately, impacts the overall performance of the company.

To improve, one must measure. To measure, one must organise. Faced with multiple channels for receiving orders, the first step to effective order taking is to consolidate all incoming documents into a single solution, thereby providing full visibility and traceability into every received order, including its real-time status and overall history in the company's processes.

2. Don't lose orders!

For purposes of productivity and business knowledge, customer service or sales administration departments are often organised by geographical area, product line, market or a combination of these. This is especially the case when a company operates with a shared services centre.

Considerable time can be saved by simply sending an order to the right person to process it. Routing orders from one department to another or from one floor or site to another may lead to errors, losses, delays, and a total lack of visibility and traceability.

These types of unproductive tasks often go unrecognised or ignored, even though they can be solved with relative ease. Automating customer order routing allows the right order to be sent to the right person or department without any manual intervention.

This is accomplished using predefined criteria identified when the order is received, which frees up time to better serve customers!

"We have been able to reduce headcount and to move some Customers Service Representatives into training and quality roles." Louise St Clare, Customer Service Manager, DuluxGroup Australia & New Zealand

3. Control risks and eliminate tasks that provide low added value

For orders that are not transmitted as data files, entering the order in the ERP system is a common — yet often troublesome — step. Who would claim that entering data into a system is a high value-added task?

However, even the slightest error (and there are often some) can have undesired consequences. Manufacturing eight tons of tiles and shipping them across the country, only to find out that the colour is wrong, is disastrous in terms of customer service (not to mention wasted resources). It's no better if the delivery date is off or if the address is wrong.

> In the order-to-cash process, customer order management is a key activity.

Automating the process makes order entry secure and prevents errors by guiding the user with automatic input, performing real-time data consistency checks, supporting access to ERP resources and integrating with the ERP to manage alerts. Teams can focus on high value-added tasks to verify the accuracy of order data or more effectively manage their customer relationships.

4. Proactively communicate with customers

An incorrect order that is entered correctly remains incorrect and will still be delivered with the wrong products or volumes. Therefore, it is essential to reinvest saved time into verifying the accuracy of the customer's order.

This means communicating directly with the customer to clarify the order or to adjust it so it meets the actual need.

Automating the process of handling customer orders increases a company's ability to satisfy its customers and directly boosts sales.

5. Measure the results and continuously optimise the process

Key performance indicators – such as late orders, orders that fail to comply with time commitments, low team productivity, trouble handling unexpected volumes and recurring problems – can help identify order management issues.

Automating the process is only the first step of improvement. Optimisation comes by measuring results, analysing them and developing and executing an ongoing action plan.

Do any of these five points sound familiar? Analyse your order management process, and you will discover a new source of productivity improvement and customer satisfaction.

Emmanuel Olivier is Chief Operating Officer at document process automation specialist Esker.

eDiscovery market to Reach $US9. 9 Billion in 2017: analyst

The global eDiscovery Market was worth USD 3.6 billion in 2010 and is expected to reach USD 9.9 billion in 2017, growing at a CAGR of 15.4% from 2010 to 2017, according to analyst firm Transparency Market Research.

In the overall global market, the U.S. is expected to maintain its lead position in terms of revenue with 73% of global e-discovery market share in 2017. Key factors driving the global e-discovery market include increasing adoption of predictive coding, growing risk mitigation activities in organisations, increase in criminal prosecutions and civil litigation and growth of record management across various industries.

The U.S. eDiscovery market was valued at USD 3.0 billion in 2010, and is estimated to grow at a CAGR of 13.3% from 2010 to 2017 to reach USD 7.2 billion by 2017. The rest of the world e-discovery market is expected to grow at a CAGR of 23.2% to reach USD 2.7 billion by 2017.

In the next five years, the e-discovery industry growth will get further support from increasing automatic enterprise information archiving applications, growth in multi-media search for sound and visual data, next generation technology growth for cloud computing i.e. virtualization and increasing involvement of organizations in the social media space.

Browse the full report at http://www.transparencymarketresearch.com/ediscovery-market.html

Nuix 5.2 takes on Big Data challenge

Nuix has announced version 5.2 of the Nuix Engine and its core eDiscovery and Investigator products. This release includes smarter eDiscovery production and quality control workflows, deeper forensic analysis, support for more file formats and automated text summarisation. It also incorporates technology advances that pave the way for solutions in areas such as cyber-security and privacy.

"The more we look, the more we realise how the Nuix Engine's unique ability to index, search, analyse and extract knowledge from unstructured big data with speed, scale and precision can be applied to new and vital business problems," said Eddie Sheehy, CEO of Nuix.

"In this release, we are adding capabilities to index and search data simultaneously and to decide dynamically what metadata to extract based on the content of each item. We are currently beta testing products using these capabilities to solve all kinds of new challenges such as cybersecurity and privacy."

For eDiscovery specialists, Nuix 5.2 is much faster at creating production and item sets, and up to 50% faster at exporting to review platforms such as Relativity and iCONECT.

The new quality control module makes it possible to review imaging and stamping, fix rendering errors and insert custom slip sheets prior to export.

Investigators will have the ability to dig deeper into Mac OS, Linux and Windows disk volumes and unallocated space; analyse Windows event logs and jump lists; and interpret regions in the binary structure of files.

New features such as text summarisation, topic modelling and a customisable timeline view provide new ways for all Nuix users to rapidly understand and analyse content.

In addition, an early minor release of version 5.2 will have the ability to run natively on Mac OS and Linux systems.

Laserfiche

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Laserfiche Enterprise Content Management (ECM) maximises the value and utility of structured and unstructured information within an organisation. Our solution gives IT departments centralised control over system infrastructure, while offering business units the flexibility to meet their needs.

With document imaging, document management, business process management, records management and mobile applications baked into the core system architecture, Laserfiche makes it possible for organizations to standardize on a single ECM system. Join regular webinars online to learn how 34,000 organisations use Laserfiche to improve customer service and automate business processes to achieve measurable results (Contract Management, Invoice Processing, HR Onboarding, and more).

Laserfiche ECM solution meets the global standard of VERS (Victorian Electronic Records Strategy), and supports Microsoft SQL and Oracle platforms, featuring seamless four-way integration with SharePoint. Contact Laserfiche to tell us your needs, we will be sure to guide you to a team of local experts most suitable for you.

EzeScan

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EzeScan is Australia's most popular production document scanning software solution and product of choice for many Records and Information Managers. This award winning technology has been developed by Outback Imaging, an Australian Research and Development company operating since 2002. With more than 750 installations world-wide, EzeScan enables its clients to substantially reduce the cost of deploying batch scanning and data capture solutions for documents of all types.

EzeScan works with virtually any TWAIN/ISIS/WIA compliant scanner or any brand of networked MFD, often being selected to replace the software that ships with scanners. With "out of the box" seamless integration with many industry standard EDRMS and/or ECM systems, EzeScan saves both time, money and lowers the risks associated with developing and integrating third party scripting or custom programming.

EzeScan has a proven track record with HP TRIM, Objective, TechnologyOne ECM, Autonomy iManage WorkSite, Open Text eDOCS/Livelink, Microsoft SharePoint, Xerox DocuShare, infoXpert eDRMS, infoRouter, Meridio, Laserfiche and Alfresco. EzeScan solutions range from basic batch scanning with manual data entry to automated data capture, forms and invoice processing.

ABBYY

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ABBYY FlexiCapture 10 is a powerful data capture and document processing solution that provides a single point of entry for automatic and accurate conversion of forms and documents into business-ready data. FlexiCapture recognizes multiple languages and automates a variety of tasks, such as data entry, document separation and classification by type—providing the data you need, fast.

Thanks to its up-to-date technology for document classification and data extraction, this software is easy to configure, use and maintain.

The state-of-the-art architecture of ABBYY FlexiCapture 10 allows building solutions that meet a wide range of throughput needs—from cost-effective standalone systems for small-to medium businesses and departments to highly scalable server-based solutions for medium sized and large businesses and government projects. In addition, ABBYY FlexiCapture can be integrated with back-end systems and into specific business processes to improve overall efficiency and reduce costs.

RecordPoint Software

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RecordPoint was created to cost effectively fill the gaps in SharePoint that prevent it being used as a standards compliant, enterprise grade record keeping solution. RecordPoint addresses the local compliance challenge by leveraging and extending the native document and records management capabilities in Microsoft SharePoint to provide a 100% SharePoint solution that is built to meet global and local record keeping standards that were previously cost prohibitive or technically unfeasible.

By adding capability to the Microsoft SharePoint platform, RecordPoint:

- Reduces the cost and complexity of electronic and physical record keeping;
- Increases the adoption of record keeping processes by users;
- Results in ISO 15489 and ISO16175 compliant document and records management;
- Increases information worker productivity and reduces business risk;
- Enables It platform consolidation, saving cost and simplifying operations; and
- Improves SharePoint scalability, manageability and performance.

Kodak alaris

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From the world's fastest scanners and integrated imaging products to service and support, KODAK Document Imaging creates solutions that meet real-world customer demands.

Today, we are meeting the need for high speed colour output, plus integrated imaging technologies that convert digital files to film... and back. Our mission is to make it easier for customers to manage their documents for less cost -- with greater efficiency, and with guaranteed access to images -- by delivering innovative, customer-focused, and operational best-in-class products and services. KODAK Document Imaging has redefined document scanning with a host of built-in innovations applied throughout the imaging chain. We call it Perfect Page Scanning. It is a perfect example of how we apply Kodak's imaging resources and experience to a whole new application, leading the industry in innovative solutions for digital document preservation. With one of the largest, most experienced service organizations in the industry, our products are rivalled only by our award-winning service and support

Objective Corporation

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The Objective ECM solution has been engineered to meet the complex and stringent requirements of Government and highly regulated organisations, which have high volumes of unstructured information, complex business requirements and require flexible deployment requirements. Objective ECM is a comprehensive suite of modules that connects content to people and the business systems they work with on a daily basis. Designed to maximise user adoption with zero training interface options, Objective ECM delivers a simple, fast and personal experience that can be shared on a vast scale. Objective Corporation is an established leader and specialist provider of proven content, collaboration and process management solutions for the public sector.

Our solutions empower public sector effectiveness; efficiency and transparency helping government deliver better services to the community at a lower cost. Through direct customer engagement, Objective is committed to delivering outcomes that have a positive effect on the public sector, its citizens and the community.

Kapish

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At Kapish we are passionate about all things TRIM. As a HP Software Gold Business Partner, we aim to provide our customers with the best software, services and support for all versions of the Electronic Document and Records Management System, HP TRIM and HP Records Manager (HP RM). We understand that it can sometimes be an all too common problem where document and records management is seen as being just too difficult.

To help improve this perception we offer easy to use business solutions to overcome the everyday challenges of information governance using HP TRIM / HP RM. As a software and services company focused exclusively on HP TRIM / HP RM, we work with our customers to improve their everyday use and experience with the system. Designed to bridge the gap between users and technology, our software solutions are easily integrated into existing systems or implemented as new solutions. Quite simply, our products for HP TRIM / HP RM make recordkeeping a breeze.

Information Proficiency/Sigma Data

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Information Proficiency and Sigma Data are at the forefront of Information Management Services and Streamlining Business Processes. We supply and support HP and Kofax software solutions, as well as developing our own range of productivity and connectivity tools based around Kofax and HP Records Manager (HPRM). Focusing on Information Management Technology and Services, we work hard to understand our client requirements, and implement solutions to match.

Implementing efficient processes are critical to enhancing productivity, transactional speed, reducing costs and achieving regulatory compliance for your organisation.

Our team of industry certified professionals are able to design and deliver systems to meet your requirements. We strive to build lasting relationships with our clients, providing continuous improvement and mature solutions.

Glentworth Consulting

Tel: 1300 634 430
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Glentworth enables organisations to increase the value they gain from their information, thereby increasing productivity, promoting growth, reducing transactional costs and enabling process optimisation.

Successful growth of your organisation will directly rely upon the capability to reduce errors, increase quality and make timely decisions.

Information is woven through the fabric of the modern organisation and consequently drawing the secondary value of this strategic asset will play a critical function if costs and waste are to be contained.

Glentworth is a trusted partner of organisations across the commercial, not-for-profit and government sectors. Our consultants have proven capability in providing innovative and effective data, information and knowledge management solutions across sectors and problem domains.

We carefully discover the circumstances of the situation and design a fit-for-purpose approach to fit those circumstances. This allows informed decision making to choose the right techniques that help achieve the outcome.

Glentworth has a particularly strong track record across industry sectors and its consultants have proven capability solving the most complex of data and information problems. It also specialises in disaster management, public safety and security and has worked across Australia in these vital areas. Glentworth is known as an ethical business with a strong sense of social responsibility, which it demonstrates tangibly and consistently. The company is Australian-owned; and its staff are personally and passionately committed to delivering quality outcomes to clients.

MacroView Business Technology

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MacroView Document Management Framework (MacroView DMF) extends and enhances the document management capabilities of Microsoft SharePoint, making SharePoint an attractive replacement for file shares and Exchange Public Folders and a viable alternative to traditional document management systems for managing documents, emails and other files.

MacroView Message, a subset of DMF that runs in Outlook, has been used by organisations around the world as the basis for email recording and email retention solutions in Microsoft SharePoint.

Both MacroView DMF and MacroView Message feature excellent integration with Microsoft Outlook. The DMF tree-view enables intuitive viewing and navigation of a SharePoint document store, so that managing documents in SharePoint is as easy and familiar as using Windows Explorer.

MacroView DMF streamlines saving PDFs to SharePoint from Adobe Reader or Acrobat and is designed to provide good performance even when working with very large SharePoint document stores.

FileBound Australia

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FileBound is an end-to-end process automation solution for enterprises of all sizes. FileBound is a cloud-native document and work management solution that automates the flow of enterprise work.

This comprehensive enterprise content management (ECM) solution features capture, document management, workflow, electronic forms, analytics, mobile access (IOS and Android) and much more.

It presents in a single, easy-to-use application that manages business processes from beginning to end and reliably connects people and information.

FileBound provides organisational efficiencies, drives out manual paper-based processes to decrease costs, increase productivity and support compliance with internal and external mandates. FileBound users have the flexibility to create a variety of solutions from complex AP automations to simple document archival and retrieval processes.

FileBound can be purchased as a Cloud Solution, an On-Premise Solution or as a Network Appliance.

Aleka Consulting

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With a unique knowledge base in text analysis and storage technology, Aleka provides products and services to let users work more effectively with email, electronic documents and document management systems.

FindAlike – Office Add-in using near-matching technology to find email recipients and senders for the same message, find different versions of the same document, and suggest recordkeeping containers based on content.

AK Disposal View – Web-based access to disposal authorities to minimise 'donkey vote' filing.

DMS Health Check – find misfiled documents in your DMS

Mailing List Cleaning - identify different name/address representations, dead and relocated recipients and save postage.

Storage Audit and Remediation – find out what and who is filling your storage and painlessly reduce it.

SharePoint Migration – much more than drag and drop! Flatten folder trees, de-duplicate, deal with naming rules, map permissions.

Facet Folders – metadata-based browsing of disordered data.

Rule-based Sentencing – apply rules to file names, folder names and text content to speed document sentencing.

SharePoint boost for ABBYY Recognition Server

ABBYY has announced the new release of ABBYY Recognition Server, its server-based software for automated, unattended document conversion. The latest release offers new functions for more-efficient conversion of large archives, plus enhanced Microsoft SharePoint integration that allows turning images in SharePoint-based document libraries into searchable content. The new version also offers advanced PDF creation capabilities, new fault-tolerance mechanisms, and enhanced Arabic optical character recognition (OCR).

"While organisations are increasingly going digital to consume, share and store information, paper documents are still prevalent throughout enterprise environments," said Aram Pakhchanian, director of Data Capture Products at ABBYY.

"Recognition Server enables businesses to handle large volumes of documents more efficiently than ever, and quickly turn unstructured images, and entire document libraries, into searchable and usable information."

Designed for mid- to high-volume document processing, ABBYY Recognition Server enables organisations and scanning service providers to establish cost-efficient processes for converting paper and image documents into electronic files suitable for search and long-term digital archiving. It automatically obtains images of documents from scanners, file servers, fax and e-mail servers, and Microsoft SharePoint libraries. It recognises content of document images in more than 190 languages and allows adding metadata. With its distributed and highly scalable architecture, Recognition Server can convert virtually any number of documents in a short time.

Key new features include:

• **Processing Documents from Archives and Microsoft SharePoint Libraries** – ABBYY Recognition Server can now traverse a tree of nested folders or a document library in Microsoft SharePoint, convert discovered image files into searchable formats, and reproduce the entire library in a searchable form. Newly added files that appear in the library can be processed automatically. Thanks to its enhanced integration with Microsoft SharePoint, ABBYY Recognition Server can convert document images and scanned PDFs directly within SharePoint libraries, making work with documents more effective for SharePoint users.

• **Enhanced Robustness and Fault Tolerance** - With the addition of an SQLite database and enhanced fault tolerance mechanisms, ABBYY Recognition Server has become even more robust and able to consistently handle high workloads or serve multiple clients within one installation. This makes the software perfectly suitable for extensive and enterprise-wide document conversion projects.

• **Smarter PDF Conversion** - During PDF conversion, ABBYY Recognition Server can intelligently detect PDF files that require OCR processing while leaving untouched PDFs that already have a text layer. When converting PDF files into archiving formats such as searchable PDF or PDF/A, ABBYY Recognition Server will inject a text layer into them while keeping intact the image quality, metadata, bookmarks, annotations, attachments, and other features of the original document. ABBYY Recognition Server also extends support for digital archiving standards by supporting PDF/A-2a, PDF/A-2b and PDF/A-2u formats.

• **Faster Arabic OCR** - Along with a general improvement of OCR accuracy and speed, ABBYY Recognition Server delivers up to 20 percent faster processing of Arabic texts and up to 10 percent more accurate results on office documents and books in Arabic.

• **Easier User Management** ¬ To further reduce administration efforts, permissions for different tasks such as administration, verification and indexing can now be assigned via Active Directory user groups.

www.abbyy.com/recognition_server

Secured Signing delivers eSign Kiosk

Secured Signing has announced the availability of the new Secured Signing Kiosk feature. The solution enables businesses that implement Secured Signing's eForm and eSigning workflow to continue to keep their paperless practices with walk-in customers.

The Secured Signing Kiosk allows a company's representative to log-in at the workstation and invite the walk-in customer to fill-in and immediately eSign the appropriate eForms. To complete the secure digital process, the company's rep is required to countersign the document, and thus declare the walk-in customer's identity was checked.

The Kiosk suits many industries including financial services, HR, recruitment, and any sales organisation or business that needs to approach customers in varied environments and aims to cut paper handling while keeping the highest levels of security.

"The increasing demand for digital processes that meet companies' diverse operational needs are behind this latest innovative development," said Mike Eyal, Managing Director at Secured Signing. "The Kiosk offers useful flexibility that keeps a streamlined electronic course which shortens work processes and increases business profits.

www.securedsigning.com.au

TIS eFLOW Signature Verification

Top Image Systems has announced the launch of eFLOW Signature Verification, designed to enhance the eFLOW product scope for existing customers, while presenting new customers with an innovative solution to reduce fraud.

eFLOW Signature Verification automatically analyses incoming signatures on any document against existing samples collected during previous instances, such as during an account opening. Signatures flagged as potentially fraudulent are passed to operators through a graphical interface for further analysis to highlight clearly where the problem areas are. With eFLOW Signature Verification, processes are quicker and more accurate, and staff can be redeployed, thus enabling cost savings.

TITUS updates Classification Suite

TITUS has announced the latest release of Classification Suite, providing an integrated suite of classification and information governance tools. The suite consists of four products which allow users to classify and protect a wide variety of unstructured information - from email in both Exchange and Outlook Web App (OWA), to Microsoft Office documents, PDFs, zip files, etc.

"Since 2008, the Australian Federal Government has been using TITUS Classification solutions to comply with the Australian Email Protective Marking Standard," said Sunday Oloyede, IT Consultant for the Australian Federal Government.

In this release, TITUS has enhanced its integration with data loss prevention (DLP) solutions, helping to reduce the risk of data loss by capturing end users' knowledge about the sensitivity of information, and making that available in the form of visual classification labels and corresponding metadata.

Enhancements have been made to the flagship product, TITUS Message Classification (TMC), which provides classification and policy enforcement to help organisations secure their enterprise email.

-- Improved control over email attachments to help prevent inadvertent disclosure of intellectual property, personally identifiable information, and other sensitive information.

-- Enhanced Active Directory integration to ensure the right people are accessing the right information through email.

-- Deployment enhancements to make it easier for organizations to provide different configurations to different users.

-- Support for advanced classification schemas in OWA.

Scanning when the clock is ticking

Kodak Alaris has added two new scanners to its Scanmate range that address specific document capture and management requirements in a transaction-based business environment, the i1150 ($A790 with 3yr RTB Warranty, pictured above) and i1180 ($A1190 with 3yr RTB Warranty) scanners.

Employees using these solutions are typically interacting with customers and need to keep the transaction moving to reduce wait times and increase customer satisfaction. At the same time, businesses want to increase the number of transactions they complete each day.

"Business managers have enough to worry about today, from delivering prompt customer service to streamlining transactions, so tools that can speed and simplify the information capture process are extremely valuable in maintaining customer satisfaction," noted Tony Barbeau, General Manager, Document Imaging, Kodak Alaris. "Scanning and managing documents can be a potential bottleneck in the office, but our two new scanners are making it easier than ever to focus on serving customers."

For example, a business might accept applications from customers at a service window or agent's desk. The complete application may consist of a small amount of paperwork and an identification (ID) or other account card. In this case, an employee needs to quickly scan the documents and cards without slowing down their interaction with the customer or slowing down the transaction itself. Recognising that a majority of transactions involve 10 or fewer documents to be scanned, the Scanmate i1150 Scanner features a special Transaction Mode, enabling 60 percent faster capture speed for the first 10 pages.

The Scanmate i1180 scanner extends the concept of an intelligent device by embedding Perfect Page image enhancement technology into the device to reduce processing demands on the user's PC. The Scanmate i1180 Scanner is also a fully licensed device for the EMC CAPTIVA Cloud Toolkit, making it easy and for those using this software development kit (SDK) to write and enable browser-based capture applications.

Other shared features of the new Scanmate models include a simple icon-based colour interface that helps quickly identify where to send captured images. The built-in card ledge on the front of the scanners helps keep track of cards and associated loose materials so nothing gets lost during processing. A small footprint and extremely quiet operation mean users don't have to interrupt customer conversations while scanning.

Both scanners are supported by a range of Kodak Alaris software, including one-button Smart Touch functionality and Kodak Capture Pro Software Limited Edition.

For further information on the new models contact francis.yanga@kodakalaris.com

ViaWorks looks inside SharePoint

VirtualWorks Group has released an update to its ViaWorks solution for external access to content in Microsoft SharePoint, SharePoint Online or Exchange Online.

ViaWorks promises to enhance SharePoint users ability to pull external data (both structured and unstructured) into their SharePoint experience, no matter where it lives, using the familiar SharePoint interface. It also simplifies life for the IT department, which gets out-of-the-box functionality without having to move a single file and without the need for migration, custom coding or integration.

Support for Exchange Online extends the ability to access information in email messages or attachments to users of the online version of Exchange. ViaWorks is content integration software that aims to help solve the problem of the exploding volume, velocity and variety of data filling data centres and spreading across the cloud. The extent of this problem was illustrated recently in a Washington Post Story, which discussed the enormous number of valuable PDF reports generated by government agencies that are never seen.

The final paragraph of the story reads: "Not every policy report is going to be a game-changer, of course. But the sheer numbers dictate that there are probably a lot of really, really good ideas out there that never see the light of day. This seems like an inefficient way for the policy community to do business, but what's the alternative?"

"Our mission is to make content instantly and securely accessible — regardless of what it is or where it is," said Erik Baklid, CEO. "We will continue to expand the universe of products integrated with ViaWorks, allowing organisations to unleash the power and value of their information, turning it into true corporate assets."

In addition to improved access for SharePoint and Exchange Online environments, ViaWorks now features additional capabilities on its Web dashboard. Administrators now have graphical displays that give them insights into the indexing progress and the volume and variety of files in their enterprise.

Text mining for enterprise search

Linguamatics has launched the latest release of its natural language processing (NLP)-based text mining and analytics platform I2E 4.2, introducing integrated charting and graphing to provide visual analytics for results extracted from large volumes of unstructured data. I2E 4.2 includes new capabilities to support the integration of semantically enriched data into enterprise search engines to enhance the search experience.

The integrated visualisation capabilities in I2E 4.2 will allow users to gain a comprehensive view of large or complex data sets with the ability to filter down to the information of most interest, making it easier to access the most important information faster and share results throughout the organisation thus enabling more rapid decision support and increased speed to insight.

The new semantic enrichment functionality enables I2E to automatically identify and mark up concepts and relationships within data already used by enterprise search engines and link these to I2E's domain knowledge to provide improved search results.

David Milward, Linguamatics CTO, commented "We are now working to a shorter release cycle, allowing us to respond in a more agile way to customer requirements. We're excited about the increasing demand for I2E in semantic enrichment for enterprise search platforms such as Microsoft SharePoint, and have delivered dedicated functionality to support that".

Other product enhancements include index optimisation which provides reductions in index sizes of over 70% compared to I2E 4.0, leading to savings in storage costs. This is particularly significant as customers scale up their enterprise text mining operations to deal with the challenges of big data.

www.linguamatics.com

Brava HTML5 client adds Doc Merge

Informative Graphics Corporation has announced the latest version of Brava! Enterprise includes a Doc Merge add-on option to combine multiple files of any type or split long documents to create new PDF or TIFF files from within the HTML interface. (Doc Merge is also available as a standalone product.)

The .NET version of the Brava Server has been updated to include the vector HTML client, electronic signatures, Checkview and a new Software Developer's Kit (SDK), making it easier for developers to integrate and customise Brava.

Brava HTML5 viewer has also been updated to provide more CAD-friendly views, including loading CAD files at extents and automatically changing line colours based on the background colour. In addition to being optimized for the iPad, the HTML5 viewer features iOS 7 colour themes.

Brava now supports Microsoft Internet Explorer 11.

www.bravaviewer.com

Epson adds portable wireless scanner

Epson has introduced the WorkForce DS-40, its first wireless portable document scanner. Weighing just over 2kg, it offers Wi-Fi connectivity for point-to-point scanning directly to a PC, Mac or mobile devices, as well as one-touch scan-to-cloud capabilities.

Because it is powered by battery or USB source, users have the flexibility to take the DS-40 on the road and to scan directly to a mobile device, which is ideal for professionals working remotely that require instant access to critical documents.

Users can scan a variety of originals—from documents up to 21cm by 9m to receipts, business cards or rigid ID cards—and take advantage of advanced correction tools, including auto-sizing and enhancing text quality, correcting image skew and removing punch holes. The WorkForce DS-40 offers a TWAIN driver, making it compatible with most existing third-party software. Simplex scanning creates editable text and searchable PDFs; professional image quality at up to 600 dpi. Software includes Epson Document Capture Pro, ABBYY FineReader and NewSoft BizCard.

The WorkForce DS-40 is $A199.

FileBound 7 introduces enhanced UI, workflow, eForms and Analytics

Upland Software has launched announced the latest version of the FileBound cloud-native document and workflow automation software claiming it takes the product's analytics, workflow and electronic forms capability to the next level in the cloud.

FileBound Australia Managing Director Lee Bourke said, "The new interface provides the crisp, clean look that users expect from their software solutions. The inbuilt portal and forms designer functions are wonderful additions that will allow organisations to extract even greater ROI's from their FileBound investment.

The FileBound 7 interface has been updated with a new look focused on ease of use, faster navigation, reducing clutter and bringing focus to the relevant and most important content.

Mike Dooner, Product Marketing Manager, Document Management Solutions for Konica Minolta Business Solutions Australia, said, "The design and feel of the new customer interface in Release 7 is far more user friendly and intuitive. This coupled with the inclusion of the new e-Forms drag-and-drop designer widens the gap between FileBound and its competitors we believe will help drive more business."

Other enhancements to FileBound 7 include:

New Workflow functionality that provides even greater flexibility in configuring and testing workflow in the graphical drag-and-drop interface. This gives users greater control and lets them respond to changing business needs quickly.

A new Forms Portal, which includes a drag-and-drop E-form Designer that lets users create forms directly in FileBound in a matter of minutes. The Portal extends business processes outside of the four walls of the enterprise by allowing anyone anywhere to complete forms that can collect additional documentation and signatures.

A new Android app, complementing the current iOS app, and an overall responsive design that allows FileBound to be device agnostic. Workers at organisations with BYOD policies and remote workers can have access to the same FileBound system at no additional cost over traditional access.

Analytics enhancements that provide meaningful, timely and actionable business insights into all work processes. This allows business owners to get the full value of the data in FileBound to make better business decisions.

www.filebound.com.au

Unified archiving of SAP data

ZL Technologies, a provider of unstructured data management tools, has announced its ZL Unified Archive (ZL UA) 8.0 solution has achieved SAP-certified integration with the SAP ERP application running on the SAP HANA platform. This allows centralised archiving of unstructured and structured data content together in the ZL UA environment.

ZL has also joined the SAP PartnerEdge program as an SAP software solution and technology partner. Through the certification and partnership, ZL plans to expand UA functionality to customers currently leveraging SAP applications for structured data. The ZL Unified Archive was built from the ground up to handle the massive data volumes of carrier-class organizations. By ingesting and archiving unstructured data sources in a single platform, data "silos" are eliminated, allowing for seamless and centralised management of data across multiple business requirements.

With one framework to handle all archiving, search, storage, eDiscovery, records management, and compliance needs, ZL UA allows the enterprise to leverage information proactively while precisely controlling data lifecycles. As unstructured data and textual analysis technology continue to mature, the convergence of structured data and unstructured data is inevitable, increasing the business need for infrastructure that can efficiently handle both. Through the SAP-certified integration with SAP ERP running on SAP HANA, ZL UA helps paves the way towards unified archiving of both unstructured and structured data in the same environment, allowing for data lifecycles and storage to be managed in a centralized platform.

By ingesting data produced by SAP solutions, the ZL UA repository can offload information generated in SAP applications, allowing it to be organized, searched, and managed with the same efficiency as unstructured content such as business records. Consolidated management of different data streams allows data to finally be seen as a single business asset rather than silos based on data type: an exhaustive and searchable "memory" of corporate knowledge.

"As unstructured data continues to grow in analytics value, it becomes increasingly unrealistic to treat it as a separate entity," said Kon Leong, CEO of ZL Technologies.

www.zlti.com

OPEX Falcon scanning workstation

OPEX Corporation has added a mixed document capture workstation, Falcon, to its family of prep-reducing scanners.

Falcon combines OPEX's one-step drop feed scanning with the performance of a high-capacity production scanner, able to tackle workflow ranging from document conversion services and mobile scanning operations, to wholesale lockboxes and digital mail.

"In terms of its overall versatility, Falcon will be, for many operations, the only scanner they will ever need," said, Scott Maurer, President of OPEX International.

The company claims Falcon allows operators to prep and scan documents at a faster rate than most current prep only processes. This significantly reduces costs associated with preparing documents for scanning. In addition, Falcon offers four feeder options: drop-feeder, packet feeder, high-capacity feeder, and a Rescan Feeder.

Falcon is available as a transportable unit fit for mobile scanning operations. When fitted to the OPEX Model 72 Rapid Extraction Desk, FalconRED promises fast, efficient processing of payments and mail orders with the ability to scan virtually any document directly from the envelope.

Other features include a customisable work surface and optional motorised height adjustment for maximum operator comfort. Falcon comes equipped with OPEX CertainScan 3.0 prep-reducing software: providing a way to visually classify documents as they are scanned.

For enquiries about local distribution and pricing, contact Jonathon Stevens, Business Development Manager-APAC, OPEX Corporation JonStevens@opex.com

Big Data governance suite

A new Data Governance suite from Dataguise promises the ability to declare policies, discover sensitive data, view and track entitlements, and audit access to sensitive data - automated across transactional databases, data warehouses, file shares, Apache Hadoop, and other Big Data sources.

Initial supported platforms include Oracle, IBM DB2, SQL Server, Teradata, Cloudera, Hortonworks, MapR and Pivotal HD. Dataguise for Data Governance is fully compatible with DgSecure, Dataguise's platform for data privacy, protection and security for sensitive data across the enterprise.

Dataguise for Data Governance features include:

- Policy Quickstart: Select pre--defined policies for PCI, PII and HIPAA; or click--to--create custom policies with no coding or scripting;
- Sensitive Data Discovery: Automatically find and track sensitive data in the enterprise, whether at rest or in motion, in structured or unstructured format, across heterogeneous data platforms;
- Entitlements: View and track entitlements down to the user and data element level;
- Auditing: View automated reports and dashboards to track who accessed what sensitive data.

http://dataguise.com

iCognition launches Diem Portal 4

Information Management and Governance (IMG) specialist, iCognition released Diem Portal 4, its next generation collaborative web portal for HP TRIM/HP Records Manager, at the HP Information Governance Forum (IGF) held May 5-7 at the Hilton Sydney.

Diem Portal 4 is a complete redesign and redevelopment of the product, providing enhanced scalability, performance, flexibility, and access from anywhere.

Collaboration and sharing have been enhanced by advanced drag and drop capability, creating portlets to information, collaborative spaces to work with others, and easy information sharing. All with Diem Portal's simple search capability that uses multiple discovery methods.

"We have further advanced ease of access and use to HP TRIM workflows, and our flexible work tray design provides the user with maximum control over business processes; from ministerial briefs and correspondence management to FOI and invoice processing", said iCognition CEO Joe Mammoliti.

"All using a single trusted source, HP TRIM / HP Records Manager. Overall, this new product signifies strong user satisfaction. It is designed to maximise investment in HP TRIM / HP Records Manager, providing better user experiences, improving user take-up, reducing training costs, and ensuring return on your information management investment".

SMARTER DOCUMENT IMAGING
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Kodak Software Solutions:

Kodak Asset Management Software

Kodak Capture Pro Software

Kodak Info Activate Solution

Kodak **Scanmate** i900 and **Kodak** i1100 Series Scanner

Newly launched

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Kodak i2900 Scanner

New Models Integrated Flatbed

Kodak i3000 Scanner

New Models Integrated Flatbed

Kodak i4000 Series Scanner

Kodak i5000 Series Scanner

Why is Document Imaging Important?

Document imaging is the conversion of paper documents into electronic images on your computer. Once on your desktop, these documents can be retrieved effortlessly in seconds. Thousands of organizations around the world use document imaging every day instead of paper filing systems.

The Business Benefits are Obvious:

- Reduce the Risk of Losing Important Business Information
- Save Storage Space, Eliminate Need for File Cabinets
- Find and Manage Records Easily
- Increase Productivity and Improve Customer Satisfaction

Common Challenges of Users:

- Time wasted in searching for misplaced or wrongly filed documents
- Issues in managing huge volume of documents
- Storage space constraint
- Document safety during disasters/accidents
- Issues in flexibility of easy retrieval of documents, especially when on the go

Please contact **Kodak Alaris Australia Pty. Ltd.**
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