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Kodak captures Census 2011



The Australian Bureau of Statistics has purchased 11 new Kodak scanners for Census 2011, the largest data collection undertaken by the ABS.

These Kodak scanners will be devoted to the task of scanning more than 80 million double-sided sheets over a six month period beginning in July 2011.

ACA Pacific will supply Kodak's i1860 High Volume Scanners. Two units will be supplied initially for a dress rehearsal which will take place in 2010 at a site in the Melbourne CBD where 20,000 test forms will be scanned and processed over several passes.

The remaining scanners will be in place in June 2011 in preparation for the 16th national Census to be conducted on 9 August 2011.

Over 40,000 field staff are employed to conduct the field work. The data is processed from August, 2011 to June 2012 employing approximately 600 temporary staff.

Maps will also be scanned to aid processing and to reconcile Collector workloads.

With the first national Census having taken place in 1911, Census 2011 will also mark 100 years of national census-taking in Australia.

Involving every household in the nation, the conduct of the Census is logistically the single largest peacetime operation conducted in Australia.

Sitecore sets up in New Zealand

Sitecore has opening a New Zealand sales office, solidifying its presence in the New Zealand Content Management System market and expanding its partner program.

Sitecore currently provides Web CMS software, online marketing automation, Web analytics, intranet portals and other Web solutions to some of New Zealand's leading organizations including Statistics New Zealand, New Zealand Ministry of Education, Auckland Airport, Barfoot & Thompson and Canon New Zealand.

"The demand for Sitecore CMS in New Zealand made it clear we needed to have an in-person presence," said Michael Seifert, CEO, Sitecore. "Once again we are expanding in key global markets by leveraging strong local talent to drive success."

The new Sitecore sales office, based in Wellington, provides New Zealand organizations and partners with valuable local technical and sales support.

"This means on-the-ground support for our partners -- from end

user demonstrations and collaboration on new business pitches, to training and technical support," said Philipp Heltewig, Managing Director, Sitecore Australia and New Zealand.

"When we introduce new tools and functionality, like the recently released Sitecore Online Marketing Suite, there will be locally provided training available to partners and end users. Our goals for the immediate future are to provide innovative solutions in the New Zealand Web CMS market, build on our existing partnerships and greatly expand our New Zealand partner network."

ReadSoft and fileWise tag team for AP automation challenge

Readsoft is teaming up with the fileWise document management suite in Australia to offer a structured Account Payable (AP) processing solution for local businesses.

The solution will combine ReadSoft's automated data capture and invoice processing software with the fileWise document-centric workflow solution, promising the ability to deliver up to 40% savings on invoice processing costs.

fileWise is an Australian document management platform developed and supported by Stellar Business Process Solutions.

"By partnering with ReadSoft, we are able to provide customers with a best-in-class automated invoice processing solution that not only drives cost reduction, but also improves efficiency and compliance throughout the accounts payable cycle," said Warwick Marx, CEO for fileWise.

"The partnership creates a commercial opportunity for both ReadSoft and fileWise to extend its market wider from a technology point of view. The combination of the ReadSoft and fileWise significantly improves processing speeds allowing for reduced costs to the customer."

The fileWise solution is targeted at businesses that are processing between 60,000 and 300,000 invoices a year, and is already employed on premise at a range of Australian organisations including most recently the Northern Territory Government Shared Services. Fuji-Xerox Australia offers a hosted version of fileWise that is used by a range of its enterprise customers.

"Our partnership with Readsoft means we can now offer an OCR-independent on-premise alternative that will lead to the best solution for our customers," said Marx.

"Our solution is priced per invoice, not per user, so it does not matter if you have 1 or 1000 users the entry point will remain the same."

fileWise can be easily configured to mesh with unique business processes and the application also comes with an eForms module that can integrate any paper based form into an individual customised workflow.

The fileWise implementation team already have experience integrating the solution with a range of enterprise financials platforms including: Finance One; Timberline; Sun Financials; MFG Pro and Oracle JD Edwards and integration with other ERP solutions can be undertaken as required.

"We are excited about working with fileWise, and complementing their workflow solution for AP automation," said Frank Volckmar, Managing Director of ReadSoft Oceania.

"fileWise has built a strong AP automation reputation, capability and team. Partnering with the like-minded team who develop fileWise enables us to expand the relationship beyond complementary technologies into a shared approach for delivering and supporting highly automated AP solutions."



Warwick Marx, CEO
fileWise

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Oracle adds imaging/forms to ECM

Oracle has unveiled Oracle Imaging and Process Management 11g and Oracle Forms Recognition, both are components of Oracle Fusion Middleware. Oracle now claims it is the only company able to provide the combination of enterprise applications, business process management and content management to automate document and image-intensive business processes, such as accounts payable, employee recruitment and onboarding, and claims processing.

"Managing document and image-intensive business processes like accounts payable can be extremely time consuming and expensive without effective and integrated management," said Andy MacMillan, vice president, Product Management, Oracle.

"Invoices, receipts and exceptions can create a paper storm that delays payments, increases resource requirements and results in penalty fees and damaged business relationships. The launch of Oracle Forms Recognition and Oracle Imaging and Process Management 11g, delivers a unified, comprehensive imaging and process management platform that helps put those documents and images where they belong and where they can be easily managed -- in the applications business people use every day to complete their jobs."

Oracle Forms Recognition can analyse, recognise, and categorise virtually any structured or semi-structured document type including invoices, purchase orders, bills of lading, and claims

forms. In addition to enabling enterprise content consolidation through a single repository in Oracle Universal Content Management, Oracle Imaging and Process Management 11g helps:

Content-enable business applications and processes via pre-integration with business software, such as the Oracle E-Business Suite and Oracle Business Process Management Suite;

Simplify deployment and accelerate time-to-value through a broad set of solution templates that provide pre-defined workflows, process rules, data forms and executive dashboards. (For example, a comprehensive, pre-packaged business process module for accounts payable is available with Oracle Imaging and Process Management 11g); and facilitate standards-based integrations and deployments based on a Service-Oriented Architecture and a Java Enterprise Edition compatible infrastructure.

With Oracle Forms Recognition, information required to complete document-intensive business processes can be automatically extracted from documents captured by Oracle Document Capture and integrated into appropriate enterprise applications, accelerating business processes and reducing the potential for manual data entry errors.

In addition, Oracle Forms Recognition incorporates advanced learning capabilities, enabling organizations to save time and money by eliminating the need to create data capture templates for new business processes, vendors and document types.

K2 updates SharePoint workflow

Software maker K2 has announced a major update to its software platform that provides visual tools to develop SharePoint-centric workflow and process-driven applications. The K2 4.5 platform includes K2 blackpearl and K2 blackpoint, offerings that allow SharePoint users to automate business workflows without requiring any code-level programming. K2's visual tools allow people of various technical and less-technical backgrounds to create applications that automate processes and streamline operations.

Jey Srikantha, principal at Melbourne-based consulting firm jEyLaBs, said, "Working with the K2 4.5 release is an enjoyable experience. Whilst still being very familiar, K2 4.5 offers interesting new features."

"The Microsoft Silverlight based K2 process designer for SharePoint stands out as a significant new inclusion in the K2 blackpearl stack of capabilities. Having worked on a customer project with K2 4.5's beta and release candidate versions, we have been impressed by advancements made in performance and usability of the no-code K2 Studio and Visual Studio 2008 based K2 design experiences. The new K2 Inline Functions feature set for visual configuration of complex logic, has been well received and are an excellent addition to the platform."

K2 blackpearl is the premium package that allows the ability to delve into the code behind solution artifacts, while K2 blackpoint is a compatible WYSIWYG-only tool for those who want visual tools to build workflow and process-driven applications quickly.

The 4.5 release for K2 blackpearl includes the Web-based K2 Designer for SharePoint (using Microsoft Silverlight) that allows access to the K2 toolset via an Internet browser. It also includes the rich-client K2 Studio Designer that has been optimized to provide for

faster and more intuitive application design.

K2 blackpearl's other application designer, K2 Designer for Visual Studio, now supports Visual Studio 2008 SP1 and contains the architectural building blocks for K2's upcoming support for Microsoft Visual Studio 2010 and .NET 4.0. New K2 tools have been added to provide Inline Functions that allow users to build complex logic and calculations with simple drag-and-drop tools.

K2 View Flow has been improved in the 4.5 release to give users a graphical, real-time view into the status of any step in the process. For every action taken along the path of the workflow, audit information is available so users know what decisions were made and who made them.

K2's ADO.NET Data Provider, K2 SmartObjects and runtime components have also been enhanced, so complexity is reduced and developers can build more sophisticated .NET applications that make use of data across systems and organizations.

K2 blackpearl 4.5 now includes K2 Process Portal. K2 Process Portal is a SharePoint site that provides a one-stop location for access to information and management of processes. Reports included on the site provide deep visibility into process performance and can help uncover bottlenecks and inefficiencies.

Hennie Laubscher, Managing Director, K2 ANZ, said, "We are excited about the benefit that the improvements and new capabilities in K2 4.5 will bring to our customers and channel partners in Australia. Focus on business efficiency became top of mind for many organizations as a result of the GFC."

"K2 4.5 goes a long way in equipping our customers with better tools to address process automation challenges, knowing that more can now be achieved much sooner."

Dell unveils new data objective

Dell has announced a plan to deliver a digital content management platform for healthcare, file/email archiving and ediscovery in the second half of 2010. nown as the Dell DX Object Storage Solution, it is designed for scalable SATA repositories containing billions of files or other digital content, whether on premise or in the cloud.

Due for launch in the US in May, and Australia/New Zealand in September, it will incorporate a metadata scheme to add descriptions to digital files, to enhance content management functionality.

Justin Boyd, Dells Server & Storage Marketing Manager (ANZ), said the solution would be deployed as a DX6000 network appliance that would assist with compliance.

"The DX6000 creates a unique identifier that gives structure to unstructured data and will assist with organisations looking to design retention policies, and hook into records management platforms."

"In the medical world, if someone puts a text file into the DX6000 it will turn it into an active object and associate that file with patient names," he said.

Boyd also identified the education market and state and local government as a focus for the Dell DX Object Storage Solution.

"We will work with partners in the market today to enable organisations such as universities to tie data back to students. This is just one aspect of what Dell is doing around Intelligent Data Management (IDM) solutions."

Dell believes the DX Object Storage Solution provides a platform to reduce data management by 50 percent, and improve governance with automated policy-based retention and deletion.

"The DX Object Storage Solution is self-healing, uses wizard-



based setup and does not require LUNs or RAID groups [and] is built on a flexible, peer-scaling architecture using industry standards-based hardware and integrated software in one end-to-end solution," the company said in a statement.

Dell has announced a series of industry software vendors that will work to develop horizontal and vertical solutions around its object platform, using an open HTTP interface that simplifies and minimises the integration effort.

These include CommVault, EMC, Moonwalk, OpenText and Symantec. Meanwhile, Dell has also introduced new deduplication offerings including an expansion of its relationship with EMC.

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Data moves up on CIO radar



The management and storage of data has risen to number three in a list of Technology Priorities for CIOs in Australia/New Zealand in 2010, being edged out for the top spot by Virtualisation and Networking respectively according to an annual Gartner survey.

But more than half of the ANZ CIOs will have to deal with the issue without an increase in IT spend, as 57% of those surveyed reported their budgets would stay flat in 2010.

CIOs in Australia and New Zealand are turning to new strategies and starting to look at new 'lighter weight' technologies in order to deliver results for their organisation, according to the Gartner Executive Programs (EXP) 2010 CIO Agenda survey.

Gartner EXP's latest annual survey of 1586 CIOs worldwide, including 67 from Australia and New Zealand, was conducted in December 2009 and represents CIO budget plans reported at that time.

The survey found that CIOs around the world all agreed that their main business priorities in 2010 were to improve business processes and cut enterprise costs.

Linda Price, group vice president, Asia Pacific for Gartner Executive Programs, said "2009 was an extremely challenging year for local CIOs in the corporate and public sectors as they faced organizational change and increased demand for services with reduced resources," said Price.

"This is set to change in 2010, as the economy transitions from recession to recovery and enterprises transition their strategies from cost-cutting to productivity."

Price said that while global CIOs are transitioning from "heavy" owner-operated solutions to "lighter-weight" services, ANZ CIOs are showing interest in the technology but few are using it.

The Gartner survey did not drill down into whether data management priorities related to unstructured or structured data, although two of the Australia/New Zealand CIOs indicated Content Management was a priority for them.

Kodak unveils i4000 Series

Kodak has launched new i4000 Series Scanners for cost-effective automated document capture and management in small-to-medium sized businesses (SMBs).

The new capture platform of the i4000 Series Scanners combines walk-up ease of use, one touch scanning, comprehensive software capabilities and simplified integration within new or existing document management processes, for a complete information management solution.

The i4000 Series Scanners' compact, ergonomic design makes it easier for average end users to effectively integrate document capture into new and existing information-driven business processes.

Kodak's Smart Touch functionality allows end users to send digital documents to common destinations including e-mail, desktop applications, shared file locations and Microsoft SharePoint Server. The i4000 Series Scanners also provide flexible, dual-support for Kodak's Perfect Page Image Processing Technology or Kofax VRS Software.

"Many of our customers face increased workloads and decreased resources to manage them. To remain competitive and viable, companies look to their imaging system to deliver better productivity leaving their staff to perform other tasks. This is exactly where the Kodak i4000 series scanners are positioned with its performance and value proposition," said Francis Yanga, Channel Manager for Australia and New Zealand, Document Imaging.

The i4200 Scanner and i4600 Scanner serve as true production-level entry points, able to process images of 200 dots per inch (dpi) bi-tonal scanning quality at rated speeds of 100 pages per minute (ppm) and 120 ppm, respectively. The i4000 Series are the smallest scanners in their class to offer a c-shape transport with additional straight-through paper path, 500-sheet feeder.

In addition, the i4000 Series are the only scanners in their class to allow field speed and feature upgrades to adjust for growing volumes of documents and continuous enhancement of the solution.

The i4200 Scanner will be priced at \$A15,990, and the i4600 Scanner will be offered at \$A19,990. KODAK Service and Support will offer on-site service as standard. For more information, please visit: www.kodak.com/go/i4000.

Converga picks Prodagio for SaaS AP automation

NZ Post subsidiary Converga is launching an off-the-shelf paperless Accounts Payable solution via an alliance with Prodagio Software (US), the first time the software has been deployed under a business process outsourcing (BPO) model.

Previously unavailable in the Australian market, the Prodagio solution is being offered as a software as a service (SaaS) model, accessed securely online.

There is no long implementation process and workflows are handled internally, rather than being customised by the supplier. The first client is due to go live in Q1 2010.

Converga claims the new offering makes automated accounts payable accessible for organisations managing low volumes of invoices.

Normally the realm of businesses processing in excess of 100,000 invoices per year, Converga promises the Prodagio solution will give businesses with any number of invoices the chance to take advantage of the benefits of digital invoicing, without the need to invest in any hardware or software.

Users of the new Prodagio solution will have their invoices ingested and hosted at the same Converga Technology Centres in Sydney, Melbourne and Canberra, that are used by its biggest client, Coles Myer. Converga handles processing of over 5 million invoices annually for Coles.

Converga's CEO Brian Roberts said, "We feel there is a large potential in the Australian market for this type of solution. In the past it would be almost impossible for a business processing say, 20,000 invoices per year, to even consider going digital, the setup costs associated were just too great. With our partnership with Prodagio we are now able to offer a solution for all businesses. We are now talking to organisations with 5000 up."

"Our solution for Coles Group is very customised, and historically we have been at the big end of town, and what we wanted was to have a very configurable solution that we could take to small and medium sized businesses.

Converga uses scanning and OCR software from ReadSoft and EMC, with in-house middleware developed for Quality Control. Prodagio will be used to provide the workflow for automated accounts payable processing.

Poor data quality wastes billions

Changing the way data is gathered, processed and presented is more likely to guarantee better information and improved business performance than large investments in IT, a KPMG report has found.

Despite an annual global outlay of around \$US60 billion in business intelligence (BI), a report commissioned by KPMG and conducted by Cambridge University, found that more than half of such BI projects fail due to a combination of poor data quality and disconnect between BI and business strategy.

The survey also found that one of the most common reasons for breakdowns in BI is the ownership of business intelligence being limited to specialists within an organisation instead of being embedded in processes.

The review of research indicates that fewer than 10 percent of organisations have successfully used BI to improve their organisational and technological infrastructures.

Ian Hancock, KPMG partner for IT Advisory says that many organisations are not capitalising on their investment in BI.

"Billions of dollars are being wasted world wide on a combination of poor IT systems and bad business planning. In this fragile economic environment, we can't afford to waste resources with second rate decision making systems," says Mr Hancock.

Mr Hancock explains that BI works by aligning information requirements with strategic needs, enabling organisations to create a foundation for improved performance measurement, competitive intelligence, and effective decision making.

"Ironically, much of the data produced by corporates and governments is historically focused, inaccurate and contains limited forecast data which can make decision making more risky," Mr Hancock states.

The report found that two-thirds of executives feel that quality and timely access to information is poor and inconsistent, while seven out of 10 executives do not get the right information to make business decisions.

Randy Wong, director of KPMG's Business Performance Services says that individual departments often produce reports from poor quality information due to issues with accuracy and timeliness, leading to a lack of trust in the outcome.

"The issue is that business intelligence is often not linked to the business strategy, so key performance indicators are poorly defined and lack relevance to measure performance against the strategic objectives of the organisation.

"When senior executives are trying to understand and fine-tune drivers of performance within their organisation to achieve better results and possibly shareholder value, it goes without saying they need to rely on quality information.

"This research gives clear empirical and anecdotal evidence that those with effective business intelligence outperform the market by more than five percent in terms of return on equity," Mr Wong concludes.

Objective targets takeovers

Objective has signalled it is on the lookout for more acquisitions to expand its footprint in the content, collaboration and process management marketplace, after digesting the UK's Limehouse Software in 2009.

Tony Walls, CEO, Objective Corporation said: "We are actively pursuing acquisition opportunities that will expand our existing capabilities and deliver value to all stakeholders."

A focus on the public sector is delivering results for Objective, which has reported revenue of \$A21.1 million for the the six months to 31 December 2009, a 25% jump on the corresponding period in 2008.

The Limehouse purchase saw European revenue grow 69 per cent to \$6.2 million, while Asia Pacific revenue was up 14 per cent over the previous corresponding period. There is \$8 million in the bank.

"The successful acquisition of Limehouse Software last year expanded our public sector market share and capabilities in line with our long-term growth strategy," said Walls.

"With the business integration plan for Limehouse Software now reaching conclusion, we are leveraging our deep domain expertise in collaborative content creation, publishing and stakeholder consultation. As we continue the successful rollout of these solutions in the United Kingdom (UK) and United States, we are also launching these community and collaboration solutions in the Asia Pacific market," he said.

New contracts in 2009 included New Zealand Department of Building and Housing and Origin Energy, while Objective reports a \$900k profit turnaround in its European ECM business.

Operations in the United States continue to be profitable with a number of customer contracts signed for Objective's Limehouse solution including the Town of Cary in North Carolina and Sequoia National Forest, as part of the USDA Forest Service. "The outlook for the 2010 financial year and beyond remains positive. We expect a solid overall performance," said Mr Walls.

"We have a strong understanding of our customers' needs and deliver solutions with significant financial, social and political return on investment at a time when all government departments are striving to meet the challenge of reducing costs, while maintaining the quality of their wide range of community and business services."

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In-house legal facing data challenge: Deloitte

Deloitte's annual survey of Corporate Counsel at 200 Australian organisations has found regulatory compliance and meeting regulator requests for electronic records remain key challenges.

Nicholas Adamo, Deloitte Forensic Partner, said 82% of respondents reported an increase in regulatory activity in the past year, with the most common form of regulatory activity reported being the service of subpoenas seeking document production.

"There has been a proliferation of the use of email and other electronic forms of communication in the past five years," said Adamo.



Nicholas Adamo, Deloitte Forensic Partner.

"This increase has posed particular challenges for corporate counsel and the organisation to which they belong."

"Well over half (59%) of respondents to the survey have been required to produce electronic documents for regulators in the past year, however, 47% of respondents were not confident that they could produce all relevant electronic records in response to a legal or regulatory request."

Despite the ever increasing volume of information being generated by organisations, 14% of respondents admitted that their organisation still does not have a policy regarding the management and retention of electronic records.

"While the number who have policies has grown from 53% five years ago to 86% today, the fact that 14% remain without policies should be alarming to CIOs and general counsel alike," said Adamo.

Respondents to the survey indicated that the most significant challenge faced was the volume of electronic records. The three key risk priorities of corporate counsel are maintaining regulatory compliance, preserving legal professional privilege and handling managing and retaining electronic records.

Google Docs acquires DocVerse

Google wants Microsoft Office users to also make use of its Apps solutions, and to accomplish that aim has acquired DocVerse, a US startup that developed solutions to enable realtime collaboration.

DocVerse is a plug-in for Microsoft Office that turns those applications into full-fledged, Web-enabled, collaboration tools.

DocVerse plugs into Microsoft Word, PowerPoint and Excel, enabling real-time sharing and simultaneous, group-editing of documents.

According to a Google blog statement, "The future of productivity applications is in the cloud. But we recognise that many people are still accustomed to desktop software. So as we continue to improve Google Docs and Google Sites as rich collaboration tools, we're also making it easier for people to transition to the cloud, and interoperate with desktop applications like Microsoft Office."

"For example, we recently made it possible to use Google Docs to store and share any type of file that you have on your computer, not just the ones you create online. With DocVerse, people can begin to experience some of the benefits of web-based collaboration using the traditional Microsoft Word, Excel and PowerPoint desktop applications."

Cadac Organice explores SharePoint 2010

Cadac Organice BV has introduced its 2010 Suite, which aims to enhance the document management capabilities of SharePoint for architecture, engineering and construction and other project driven engineering industries.

The new version comes with Cadac Organice Explorer 2010, a smart client to SharePoint that is developed in Microsoft .NET 3.5 technology. Cadac Organice Explorer 2010 allows opening multiple lists from multiple sites simultaneously. As a smart client for SharePoint it offers offline capabilities, supporting users that are often travelling or working in areas where they cannot connect.

Search capabilities are enhanced and now include a Filter Editor that users can use to create advanced filters to retrieve the right SharePoint information. When users have created a specific view on a list or library, they are able to save this as a personal view.

Integration with Microsoft Office and CAD applications is also enhanced, providing users the capability to open, save and update their SharePoint documents directly from the Cadac Organice Toolbar in their application. E-mail messages can be saved through drag & drop, and when e-mail messages with attachments or CAD drawings with reference files are saved, Cadac Organice automatically recognises the attachments or reference files and provides users the option to save these too.

The integration with Microsoft Word includes Advanced Document Creation functionality that allows users to create templates for specific documents like letters, faxes and reports and automatically populate new documents based on these templates with SharePoint metadata like company, sender, receiver and project information. (Clayko Group is a new Australian partner of Organice.)

MySource Matrix integrates Funnelback Search

The latest version of the Open Source CMS, MySource Matrix, (version 3.26.2) integrates Funnelback Search for the first time.

MySource Matrix has been integrated with purpose-built Funnelback binaries incorporating powerful features for improving search results such as Contextual Navigation, Featured Pages, Type Formats and spelling suggestions. The Funnelback Search Page asset has been expanded to make it easy to implement these features.

Scripts are available within the Funnelback package which can be configured to update the index, giving the administrator control over the frequency with which the indexer is run, according to the amount of content being indexed and its dynamic requirements.

MindManager aids visualisation

Mindjet has launched a solution for creating interactive views to find, organise and update SharePoint tasks, documents and other lists, as a way to accelerate projects and business processes. MindManager for the Microsoft Office SharePoint Server 2007 environment provides the ability to look across and visually present information within multiple SharePoint sites and lists.

It offers bi-directional integration with SharePoint 2007, to let users interact dynamically with content on their desktop and provides links to view and update data from within MindManager's browser.

With a few clicks of the mouse, users create intuitive and easy to navigate visual representations of SharePoint Server 2007 content, which helps teams see everything from the big picture to the smallest details.

Views can include documents, tasks, issues, calendar items, announcements, images and links.

MindManager for SharePoint is available for \$US499.



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Objective

Oil & Gas industry takes Web 2.0 lead

Oil and gas industry professionals in the Asia Pacific lead the industry in the use of social media and collaboration tools at work, according to a recent survey by Microsoft and Accenture. Three out of four respondents in this region said social media tools improve their work performance.

The Microsoft and Accenture "Oil & Gas Collaboration Survey 2010" polled 275 professionals from the Americas, Europe, Middle East, Africa and Asia Pacific.

It found that industry workers in the Asia Pacific significantly led those in other regions in the business use of social media tools such as instant messaging, videoconferencing, social networking sites, mobile phone text messaging, video or photo sharing, and the use of blogs and microblogs.

They surpassed their peers in other regions by margins of 10 to one. In fact, 37 percent of respondents from Asia Pacific stated social media is "very valuable" for work collaboration.

"Asia Pacific, with its rapidly growing demand for energy, will set the oil agenda of the future, so driving increased productivity, enhanced collaboration and more efficient operations is of top importance in this region," said Albrecht "Ali" Ferling, Ph.D., Microsoft managing director, Worldwide Oil and Gas Industries.

"Oil and gas professionals in Asia Pacific clearly have their sights set on adopting the newest technologies to help them keep up with the growing demand for energy."

When asked where they see the most value in social media for collaboration, the top answer of workers in the Americas was "documenting and transferring knowledge."

This response tracks with the 61 percent of all respondents who said that "scarcity of skills/talent due to shrinking or aging work force" is the global industry trend most often driving their need to collaborate.

However, 40 percent of respondents from the Americas said they are not currently using any public or company social media tools in the workplace. While half of respondents from all regions said their companies were on board but not widely implementing



social media at this time, one in four from the Americas said their companies were not open to the adoption and implementation of these tools, a higher response than from Asia Pacific (14 percent) and EMEA (17 percent).

James Arnott, Accenture senior executive in Energy industry group's consulting practice said, "Companies slow to embrace collaboration technologies are missing strategic opportunities to leverage tools to drive work-force utilization and improved business and operational performance."

"The high rate of usage in emerging markets reflects those companies' rapid adoption of new technologies to provide differentiated levels of work force, operations and business performance — this is creating new levels of competitiveness."

The key finding that individuals, work groups and teams around the world are driving the use of collaboration tools within their company is indicative of the widespread need for knowledge-sharing and improved productivity through collaboration.

Minter Ellison on course for document automation

Minter Ellison, one of the largest full-service law firms in the Asia Pacific region, has implemented a PDF solution to integrate with its scanners and its Interwoven WorkSite document management system.

With more than 280 partners and 900 legal staff located in Australia, Hong Kong, The People's Republic of China, the United Kingdom and New Zealand, Minter Ellison supports leading industry and government clients.

In addition to creating, managing and sharing documents in the universal PDF format, Minter Ellison was looking for a solution that would automate the capture of all scanned images as PDF documents and route them to desktops or directly into WorkSite.

pdfDocs Desktop was deployed throughout the firm giving 1600 staff the ability to combine documents from different applications, including scanned images, into a single PDF document; annotate documents with notes and comments; and redact confidential information from PDF documents before sending them to third parties.

The fact that Desktop completely integrated with WorkSite made the creation of PDF documents an easy process. Staff had only to right-click on a document to create a PDF document that could be emailed, saved

within WorkSite or loaded into the Organizer workspace, where it could be collated with other documents.

Documents assembled in the Organizer workspace could be easily saved back into WorkSite against the source profile or against another profile.

"As much as the product impressed us, it was the commitment and responsiveness of DocsCorp that made the decision to deploy the software firm-wide an easy one."

"Software is only as good as the company that supports it and in DocsCorp we are confident that our investment will deliver long term value," said Garry Meikle, National Applications Manager, Minter Ellison.

The key benefits for Minter Ellison included the ability to combine electronic documents, scanned images, email messages and attachments into a single, secure file, with the added ability for collaboration and review.

The firm was protected by the power to confidently redact private and confidential information and secure documents by removing document metadata and preventing document tampering.

Documents can be profiled directly into Interwoven WorkSite 8 as a new document, a new version or an attachment to an existing document.

SeeUnity synchronises SharePoint and ECM

SeeUnity has launched a product designed to enable information workers to easily transfer content between SharePoint and external enterprise content management (ECM) repositories.

"Synchronize Express delivers a new type of content integration for SharePoint," says Brant Henne, Marketing Director for SeeUnity.

"Customers have requested an agile, cost-optimized solution for moving content between SharePoint and external content management systems. Synchronize Express provides this ability - with a product that installs in minutes and requires no specialized user training."

System administrators configure Synchronize Express to pair SharePoint folders with corresponding folders in external repositories - including ECM systems, line of business applications, or file shares. Content placed in the source folder is automatically copied into its corresponding destination folder. Subsequent changes to source documents are mirrored across to the destination folder. Content can be synchronised from SharePoint out to an ECM system, or from an ECM system out to SharePoint.

Synchronisation can satisfy a number of business demands, including:

- Creating local content caches for improved performance;
- Providing read and write access to duplicated files, while protecting master versions;
- Share and collecting information with external users outside of your ECM environment; and
- Archive and protect SharePoint content as ECM document of record.

Workspace Manager updated

DocAuto has announced the release of Version 1.6.32 of its flagship product, Workspace Manager, used for implementing and maintaining matter-centric architectures in Autonomy iManage WorkSite.

This release incorporates extensive functionality for providing extended support for Autonomy's iManage Records Manager (IRM) product.

Workspace Manager now includes the ability to move documents into Workspace Folders based on whether or not they have been Declared as records, to Declare or Undeclare the documents in a Folder when documents are added to or removed from a Folder, or to Declare or Undeclare the entire contents of a Workspace, Tab, Search or Folder.

Additionally, Workspace Manager includes the ability to Declare documents when they are moved from one database to another as part of its Archiving or Aging processing, as well as Undeclare documents that are being updated as part of the Aging processing, and then Re-declare them after they are updated.

"Like all of DocAuto's development, these changes have been driven by strong customer demand, and reflect Autonomy's rapidly increasing market share in the Records Management space," said David Kiefer, president of DocAuto.

"These enhancements to Workspace Manager address those needs, and take advantage of powerful new functionality in WorkSite 8.5. As the Autonomy iManage product suite continues to grow, we at DocAuto will continue to leverage that power to provide the functionality and flexibility that our customers demand."

For more information about DocAuto, call Office Information Australia on +618 9223 1700.

Fine tuning PDF/A workflow

callas software and Appligent Document Solutions have announce several Server-based product bundles for PDF/A workflows.

Many PDF/A workflows require essential PDF conversion steps that are closely tied to, but not part of, the conversion to PDF/A. The bundles combine Appligent's offerings for PDF security, variable forms, and stamping, for example; with callas' ability to convert files to be PDF/A compliant.

As a result, enterprise, government and publishing sites enjoy efficient, automated "best practice" processing of numerous steps, such as date-stamping and insuring security with signatures; for ISO-standard, PDF/A archiving.

The PDF/A file format for archiving insures that documents created today can reliably be opened, displayed and used in the future. The newest version of callas pdfaPilot, the award-winning solution first released with the publication of the PDF/A format in 2006, converts documents, spreadsheets and presentations created with Microsoft Office to compliant PDF/A files.

In conjunction with Appligent server applications StampPDF Batch, FDFMerge, SecurSign, AppendPDF and APCrypt, frequently required standards are met with the PDF/A workflows.

The performance of the bundles are as follows:

- When converting PDF files into PDF/A, the bundle comprising pdfaPilot server and server application StampPDF batch makes it possible to simultaneously capture any text or image stamps; which show, for example, when the PDF was converted and archived.

- FDFMerge is a command line tool for dynamic import of variable data and the storage of typical PDF forms or templates, such as requests, orders or print jobs (WebToPrint). Now these merged forms can be made compliant with PDF/A.

- If a PDF/A document needs to be protected against future changes, it must be signed - therefore the combination of pdfaPilot and SecurSign was developed.

- AppendPDF ensures that different documents are combined into one PDF/A - including bookmarks and a table of contents.

- PDF/A does not allow encrypted content. Therefore, before you convert to PDF/A format, you must first remove any encrypted content from the PDF files. APCrypt allows you to store a key once and to automatically decrypt any PDF to convert it to PDF/A.



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US Forces get Web 2.0 signoff

The US Defense Department has issued a new policy that allows Facebook, Twitter and YouTube to be accessed from non-classified government computers, as long as it doesn't compromise operational security or involve prohibited activities or Web sites. Deputy Defense Secretary William J. Lynn III, who signed the policy, said it strikes a critical balance between the benefits and potential vulnerabilities of these applications.

"This directive recognizes the importance of balancing appropriate security measures while maximizing the capabilities afforded by 21st-century Internet tools," he said.

While authorizing access to these tools, the new policy also recognizes the importance of protecting military networks and operations, explained David M. Wennergren, deputy assistant secretary of defense for information management and technology. For example, the new policy allows commanders to temporarily limit that access as required to maintain operations security or address bandwidth constraints. It also prohibits malicious activity on military information networks and denies access to sites promoting prohibited activity such as gambling, pornography and hate crimes. While information sharing may seem the polar opposite of security to some people, Wennergren said the Defense Department can no longer afford to consider just one or the other.

"If you look at either one individually, you will fail," he said. "You will have great security, but no ability to access information sharing. [Or], if you think only about sharing, you will run into issues of operational security and letting bad things into your system. So you can no longer think of them as two separate subjects."

The new policy promotes what Wennergren calls "secure information sharing," providing the balance needed to tap into the capabilities social media networking provides without compromising security.

He emphasized the importance of personal responsibility in using unclassified military networks to access these tools, and said the department will continue to evaluate the policy after it takes effect.

"There's a huge imperative for security," Wennergren said. "It is everyone's responsibility in the department to make sure they are doing all that they can to protect our information and our information systems."

Ultimately, he called responsible, security-conscious use of social media networks a win-win proposition for the Defense Department and its members, enabling them to take full advantage of the power of social media networking.

"The world of Web 2.0 and the Internet provides these amazing opportunities to collaborate," Wennergren said. It not only promotes information sharing across organizational boundaries and with mission partners, but also enables deployed troops to maintain contact with their loved ones at home.

"So if you work on those two pieces" -- access and security -- "this really is giving people this avenue to do amazing things in terms of

getting the information shared and making decisions happen much more rapidly," Wennergren said.

Until now, most service members have been able to access social media platforms from their government computers, but policies have not been consistent across the department.

Orica relies on Esker for fax on demand

Orica has completed the implementation of an Esker on Demand fax solution in Australia & New Zealand.

Orica now uses Esker On Demand (EOD) for outbound faxing directly from three SAP systems, via Lotus Notes email, and directly from applications.

"With the capacity constraints of our original solution when there was a large demand on outbound faxing, there could be significant delays in the delivery of inbound faxes. The Esker solution has significantly reduced this delay in fax delivery. Consequently this improves our efficiency in processing sales orders and increases customer satisfaction," said Louise St Clare, Customer Service Manager at Orica subsidiary, the Dulux Group.

"We saw that there was a single point of failure in our original fax model and we needed to remove the possibility of that failure," says Peter Snare, IT Business Analyst at the Dulux Group.

When looking for a new solution, Orica reviewed the costs and benefits of upgrading its original fax solution.

"Dulux Group had been using other Esker solutions in their Customer Service Centre in New Zealand for the Australasian business. This was the Sales Order Processing solution built into the Esker DeliveryWare product. The responsiveness of the Esker supplier in Australia was fantastic and this led us to review the Esker on Demand fax solution," said Snare.

The solution was evaluated and ROI demonstrated a cost saving. "We liked the scalability of the solution offering, and not having to manage our own hardware or software supplier was very appealing."

The Dulux Group and Orica Chemicals Group also use inbound faxing to receive around 1,500 Sales Orders per day from their customers in Australia and New Zealand.

"With the capacity constraints of our original solution when there was a large demand on outbound faxing, there could be significant delays in the delivery of inbound faxes. The Esker solution has significantly reduced this delay in fax delivery. Consequently this improves our efficiency in processing sales orders and increases customer satisfaction," said Louise St Clare.

Ron Dean, Contract Manager - IT Shared Services for Orica Australia is pleased he is now able to accurately cross charge each business unit for the fax solution based on actual usage.

"Not only do we not have to manage ageing infrastructure but also we can easily manage our usage and allocate the actual costs against actual usage for each business unit."

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IBM helps British Library preserve the Web

The British Library has enlisted IBM to help with a project that will preserve and analyse terabytes of information on the Web before it is lost forever. The new analytics software project, called IBM BigSheets, helps extract, annotate and visually analyse vast amounts of Web information using a Web browser.

IBM's new technology prototype is helping the British Library archive and preserve massive amounts of Web pages, and then unlock the virtual door to its archives for generations to come.

The Web is rapidly changing with new pages created every day causing an explosion of data that is disappearing almost as quickly as it is published. Recent research estimates the average life expectancy of a Web site is just 44 – 75 days. In turn, every six months, 10 percent of Web pages on the UK domain are lost.

"IBM BigSheets does for big data what spreadsheets did for personal computing," said Rod Smith, vice president, Emerging Internet Technologies, IBM. "Within a matter of minutes, researchers, academics and students will be able to search many terabytes archived Web pages from the UK domain, analyse the results and effortlessly visualise the results of the search."

Each year more than six million searches are generated by the British Library online catalogue, and nearly 400,000 people visit the British Library reading rooms, looking for information. The British Library receives a copy of every physical publication produced in the UK and Ireland, amounting to more than 150 million maps, manuscripts, musical scores, newspapers and magazines that it must archive. Beyond just the physical assets, the British Library has been archiving selected Web pages from the UK domain since 2004. With BigSheets, users of the Library will be able to access vast archives of historic Web sites, and easily research and analyse their

queries and visualise the results of the search.

"We estimate the UK Web space will contain over 11 million Web sites by 2011. To take on the enormous challenge of capturing this content, we need a system capable of taking the UK Web Archive to Web-scale," said Helen Hockx-Yu, Web Archiving Programme Manager, The British Library.

"IBM can help us analyse the web archive containing millions of pages and unlock embedded knowledge which otherwise is difficult to discover using traditional search methods."

Whether it's someone interested in their own genealogy or a student working on a project for school, people need help making sense of this growing sea of information on the Web. For example, the 2005 election marked the first attempts by UK politicians to use the Web as a campaigning tool. With the use of Web campaigns expected to explode during the 2010 election, the 2005 collection will enable researchers studying the evolution of politics and the Web to access hugely valuable primary source material.

IBM BigSheets is a new technology prototype. Users can explore and generate new data insights using a Web application and then the IBM software publishes Web 2.0 standard data feeds which can be searchable by British Library patrons.

BigSheets is an extension of the mashup paradigm that integrates gigabytes, terabytes, or petabytes of unstructured data from Web-based repositories; collects a wide range of unstructured Web data stemming from user-defined seed URLs; extracts and enriches that data using an unstructured information management architecture; and lets the user explore and visualise this data in specific, user-defined contexts. For example, users can see search results in a pie chart and look at the data in a tag cloud.

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Access all areas

Tim LeeHealey is CEO of pioneering US forensic firm AccessData, which creates solutions that address criminal and internal investigations, ediscovery and information assurance. On a visit to Sydney to attend a seminar for forensic investigators, LeeHealey took some time out to discuss the status of digital investigation and ediscovery with IDM.

IDM: Tim, How did you get to your current role at AccessData?

TL: I was in investment banking before I joined and invested in Guidance Software which at that point was maybe a 50-70 person company. We grew it until it was by far the leading forensics provider, but I got to a point about three years ago where I didn't necessarily agree with the vision of the company and so I left. I then took the money I had made and I invested in AccessData and, you know, three years later, here we are.

IDM: You're operating in Australia and setting up a local division. Are there differences between the US and Australia?

TL: There are certainly differences in every market but I would draw a common thread through former colonies of England. The fact is all these countries adopt the same basic court system, the same basic equaliser of sort of every entity and you can all sue and resolve your issues in court and so within those markets we see the same basic dynamic over and over and over again. The real difference comes when you start to move to, you know, central European and Asian countries. And Latin American frankly, those are very different.

IDM: Are US firms more prepared because of the more widespread awareness that you must be able to produce any email or any document at any time?

TL: Maybe Australia is a little bit, and I would measure this in a matter of months versus years, a little bit behind the US because of course we had our federal rules of civil procedure go into effect several years ago which basically forced companies to adopt, but we actually look at the Australian market as a pretty progressive market frankly. I mean the conversations we've been having, the conversations I hear about are every bit as forward thinking as the ones we hear about in the States.

IDM How dependent are your tools on the extent to which an organisation has its data act together, are they able to suck in everything no matter where it's located or how it's managed, whether on servers or backup tapes?

TL: Our software relies on the information being accessible on the network, backup tapes represent something that effectively is off the network. So you would need a partner to expose those to the network, then we could search them. The advantage of AccessData's ediscovery technology is that you don't have to be organised. You could have a Wild, Wild West because the way discovery works, the obligation is, if you will, not all on the company. The opposing counsel needs to in some way provide guidance, and in the case of discovery that comes in the form of identifying custodians. I as the



We're making a big commitment to Australia. We're investing a lot of energy into this market because it provides that sort of friendly and familiar base for us to establish our success and have reference accounts. But it's also a great way to build critical mass in the region to attack the other Asian countries. - Tim LeeHealey, CEO AccessData

opposing counsel want all access to the information on these 50 people. At that point you can react to the discovery and sort of, okay so I'm going to go out and I'm going to push an agent or I'm going to go through the network share and suck down their information and then search it reactively. That's a real powerful thing about AccessData's technology, it allows you to do an investigation reactively or proactively. It's not atypical to have a list of let's say 50 or 100 key targets. These are the executives that get named in every single litigation. You set up the software to pre-index everything on those drives. So before you walk in into what we call a 26(f) meeting, that's the meet and confer where you go and you talk to opposing counsel about what is going to be agreed on in the realm of discovery, you can actually go and pre-search these 50 or 100 people you think are critical, you've got them pre-indexed.

So before you go into that meeting you have a good idea what type of information you have that can be horse-traded over. Likewise if another 100 get named you can put those into the software and go reactively search them. The competitive differentiation versus other ediscovery tools is awesome, because the fact is most tools, in fact almost every one I can think of that is a competitor in this market, requires that you effectively index all of the data, it can't reactively search. So if you're a global 1000 company and you adopt one of

"WE'RE TRYING TO EFFECTIVELY CONVERGE, IF YOU WILL, ALL THESE DIFFERENT INVESTIGATIVE MARKETS WITH EASY PURPOSE-DRIVEN WORKFLOW, CENTRALISED BACKEND AND THE ABILITY TO GRAB DATA REGARDLESS OF THE DATA SOURCE. THAT'S WHERE ACCESSDATA IS GOING."

their solutions, effectively you have to pre-index the entire network. Which is of course not doable.

If you have a petabyte worth of information on your network, and that's small for a global 1000, you're going to have an index at least a third that size, you know, and so now you're talking about a solution where it'll cost you \$5 million to buy and another \$4 million to buy the storage for the solution and, oh by the way, you have to update the indexes on a constant basis. It's just not a viable solution which is why we've seen such dramatic growth within ediscovery for us, 'cause we go with this hybrid approach, it's got all the workflow you need and allows you to search.

Another reason why I'd say we speak so well to IT versus selling strictly to consultants, which a lot of players in this market do, is you can turn the software on its head. Why only search for ediscovery? Why only search when you're told to? Let's say you have a PCI audit you have to perform, well this is a searching technology. Yes, we have the ability to do stuff that is very natural for the ediscovery market, but there's no reason you can't put in PCI-type searching, search your network for PCI compliance. You could likewise, if you're an IT driven company and somebody leaves with critical intellectual property and you want to figure out what they did, what they were doing, that's the forensics portion and, oh by the way, you don't have to stop there. Okay, this guy had access to this intellectual property, it's sensitive. This is clearly an issue, I want to go to my management and say not only did we see how he got it and all that kind of stuff, but here are the 10 other people that have it that shouldn't. It's just an investigation. We sell investigative software and that's the kind of message we can bring to IT that gets them so excited about it. They start to see all the different possibilities.

IDM: Is the market broadening beyond just forensic investigation? When you look at something like Symantec with its endpoint security products which it sells as an IT infrastructure tool. Is that something you see as a competitor?

TL: No. It's interesting. All these technologies, the Symantec endpoint, McAfee EPO type infrastructure, they provide their technology and all their capabilities in a reactive security manner. Which is good if you want the node to beep if it thinks something funky is going on that might be a security issue. But if you ever want to turn the matter on its head and take an investigative approach you have no capability of doing that anywhere within their suite. And so we partner with McAfee, we talk extensively to Symantec because not only do they know they can't do that, they have no intention to do that. Investigations are fundamentally different than proactive endpoint security. And so we see them as great partners, we like to work with them. We have

never, ever in the history of this company run across them in the context of a deal. Even as we broaden out and start to talk about security investigations, so Symantec, McAfee, all these companies throw off alerts through an ArcSight SIEM, an intrusion detection system (IDS) or whatever. But they actually provide the individual no real mechanism for investigating that alert. And so we actually do see a rapid broadening of the investigative market and while there are competitors, the big security companies are not both, they're not in it in any way, shape or form.

IDM: What does the future hold for Access data?

TL: The investigative market, not just ediscovery, but forensics and investigative, is filled with a number of different disciplines. And you have all these different constituents, if you will, that want to perform investigations for different reasons. And you have point companies developing in each specific area. And the theory, the philosophy, if you will, of AccessData is that above all forensics is the best foundation upon which to build because it's accepted in court, it's the most thorough of all the foundations and then what you need to build is basically a platform, if you will, and then host out to different constituents the information they want to see with the workflow and the manner in which they want to see it.

Our Forensic Toolkit (FTK) is recognised around the world as the standard in computer forensics investigation technology. FTK is a very hard core forensics technology, but you can process it up in a central database and then serve it out to legal in a real friendly, Web-based review tool. You could also serve it up to HR if it's an internal investigation using an equally simple Web interface. Or you can serve it up to a business analyst with a forensic set of tools, to enable them to solve their business problems.

So the point is we're trying to effectively converge, if you will, all these different investigative markets with easy purpose-driven workflow, centralised backend and the ability to grab data regardless of the data source. That's where AccessData is going.

I think we've made a huge step already in that direction. And I think that's why we've had so much success in the forensics world. It's because people see okay, I'm a forensics practitioner but let's be honest, 50% of my work is forensics, the other 50% is preparing this data to show to legal, whether they be a prosecutor or internal counsel or something like that.

And so they see that the AccessData structure leads them to being able to easily accomplish their forensics vision but then also allow legal to look directly in and get the information the way legal wants to get it. And I think that's why we've had so much success early on in the forensics space.



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Mashing up a social media strategy

In Australia for a series of customer seminars in March, Open Text CEO John Shackleton, drove home the message that "Social Media is the new content." IDM had the opportunity to talk with one of the world's leading ECM executives, and his vision for content in the Web 2.0 era.

IDM: John, you have said that Social Media will dominate the future. How is that driving Open Text's social media strategy?

JS: "For companies with highly distributed workforces, we're seeing the use of smart phones to really be both highly productive as well as informative. So for example, in the military, if a tank breaks down, you could literally take a photograph using a smart camera to show what's broken, tell them what repairs you have on board, an expert could be explaining okay based on what you've got here's how you would fix that. A FedEx delivery could take a stamp when they drop your package, photograph your door, time stamp it and the image immediately gets to the general ledger so they can make revenue. It's really mashing this rich media together as well as tying it to ERP systems and repositories in the backend. So when we talk about the possibilities of rich media and ECM, it is truly beyond just SharePoint.

IDM: There is a general reluctance of most government networks in Australia to provide access to social media on corporate networks. It must be retarding the adoption and integration of that sort of technology within their workplace.

JS: Well it's a bit like in Singapore where they don't allow cameras, smart phones in military installations. It's a bit like in the old days where we were trying to limit people having email addresses, they figured it out somehow and did it anyway. I think part of the issue we have particularly in governments is its coming whether the people try to legislate or not.

IDM: Your relationship with the Canadian government is very deep and unique in being across so many levels, providing an integrated approach to government 2.0. How can you see that extending to other markets where things are obviously going to be much more fractured and you've got yourself and other vendors on all different layers that the level.

JS: It is not only sharing internally between federal and state and local, but it is sharing with other governments and as well as learning from other governments and collaborating with other governments. Particularly in parliamentary governments, in the UK, Canada and Australia, we see a lot of similarities that we think we can duplicate now.

IDM: How is Open Text planning to provide improved access to rich media in your content strategy - you have been talking to Australian customers about new ways to visualise content?

JS: We've got a little company called Visible, out of Toronto it spent about \$40 million on research on its widget driven, highly rich media products that we see as being integrated and it's all about usability. In fact one of the things they were doing was an emergency centre where police, fire and ambulance could look at content in visual formats, in any way they wanted to see it. So we're looking quite a bit into that.

IDM: You've made a number of acquisitions in the past 18 months and there have been some who've wondered how you integrate and there must be challenges in terms of integrating different web CMS platforms. Has it been a challenge for you?

JS: Vignette is a very robust, highly scalable web content management product. The biggest problem we had was it was very weak in usability at the front end; it really needed an engineer type to be able to figure it out. So what we did is we took the Red Dot product which is easy to use and took the front of that and integrated a lot of the features and functions of Red Dot into Vignette. However, Vignette will become the standard as part of the suite that will interface with our workflow, with our digital asset management, with our document record management, that will be the suite. Red Dot will be used for small to medium sized companies that just want to do quick websites. So we're not integrating everything, we choose what will be a standalone product, this will be product two, and so as we rationalise these things it's likely it will keep going up.



IDM: Can you flag some of the areas that you think would be potential expansion areas for Open Text.

JS: Around 6% of our revenues come from Asia-Pac. We a great potential to grow this to 10 and 20% and so we might be looking at acquisitions of professional services that would help us do more installation, hand holding, training of our customers. In the US, we just acquired this little company that does professional services for Oracle installations. They were a partner of ours, they did work with us and it's a good company so we will acquire that. But I'd probably get four approaches a week from companies looking to be acquired. So we have different criteria based on geography, customer base, technology, as to how we acquire it and when we will acquire.

DAM delivers for medical imaging



Perth's Sir Charles Gairdner Hospital has installed a sophisticated digital asset management platform for medical photography using Canto Cumulus

Based in one of five tertiary hospitals in WA, the Sir Charles Gairdner Hospital's Audio Visual Unit provides medical and forensic photography for in the hospital's emergency department, operating theatres and wards, as well as providing coronial services, including post-mortem and forensic photography.

Chris Northcott is chief medical photographer and head of a team of four photographers and one graphic artist in the hospital's Audio Visual Unit.

Northcott said the hospital settled on Cumulus, now used regularly by well over 100 doctors, after an extensive period spent researching a platform that would provide a robust solution to work across the entire hospital.

"We looked at some existing installations in the eastern states at Brisbane Children's hospital and Pacific Magazines, and realised it was a stable and robust platform," said Northcott.

"We have not had a problem or urgent requirement to contact the distributor, DataBasics, since it was installed.

The Cumulus system installed includes the desktop client software and server for the photographic staff to catalogue images into Cumulus, as well as the web front end for hospital staff to research patient history and use for the continuum of patient care.

DataBasics was engaged to provide the on-site services to install, configure and train the hospital staff in using the system. The Cumulus DAM has been setup on a standalone Apple Macintosh network established by the A/V unit, running on Xserve and Xserve RAID servers.

Additional products that provide an overall solution are:

- i-prefillerPro that assists in the entry of metadata during the cataloguing process
- Email Order System Pro which adds a digital image order form to the Cumulus web front end.

Sir Charles Gairdner Hospital and DataBasics are now planning to upgrade the installation to the latest release of Cumulus, all to be implemented on updated hardware supplied by Tim Gardner of Artref.

Using a fleet of Nikon D3 digital SLR cameras, the medical photographers can be called on to handle a diverse range of assignments.

This could be something as simple as photographing a wound

to add to the patient's record, or travelling to the state mortuary to record the post mortem of an industrial accident or where unforeseen forensic evidence is required to be documented.

In the hospital, Medical photographers might be needed to photograph traumas in Emergency. Or it might be to photograph a surgical procedure such as before and after photos for plastic surgery.

"The fact that images could one day end up being called up as evidence in a legal action meant security was a big issue for us, and needed to make sure it was a robust system," said Northcott.

Once a photographer returns from a job, the unmodified RAW format image is downloaded to a working server, uploaded into Cumulus and archived.

The images are adapted to whatever the final destination medium, whether an educational PowerPoint or a print submission to a medical journal.

"When we first got Cumulus we were archiving to DVD as well but now we have gone 100% to HDD technology," said Northcott.

To preserve the image integrity, all of the RAW files are automatically archived to a server that has read only access, so there is always an audit trail back to the original unmodified master image.

"JPG is a lossy format and therefore not ideally suitable for medical photos," said Northcott.

Doctors are now able to view these images digitally via the hospital intranet from any clinic across the hospital. As patient records at the hospital are still stored on physical files, a printout of the patient images are still generated to store within the patient records. When implementing Cumulus, cataloguing and keywords were identified as a major factor to creating a successful DAM platform that doctors would find easy to use.

The hospital turned to an international standard for Medical Diagnostic Categories (MDC), which is familiar to doctors through their medical training.

All images are stored according to these 23 MDC categories, then subcategorised by anatomical region, a situation Northcott believes is unique among Australian hospitals

In WA, patients in the public hospital system are provided with a Medical Record number (UMRN), which stays with them for life. All of the clinical image records are tagged with this number to add an additional layer of security, as only health professionals with access to the patient records database will know the number.

Vic Treasury seeks search solution

Victoria's Department of Treasury & Finance is implementing enterprise search across the organisation as it completes the migration of several million documents on shared network storage outside TRIM into a more managed environment.

An enterprise search solution from ISYS Software is being deployed by DTF to provide staff with the ability to perform federated searches across TRIM and a range of other information repositories.

In the past, staff would need to perform separate searches on TRIM, various Lotus Notes databases, the intranet, Treasury & Finance Library and external Web sites.

"We were looking for something that could provide much better integration across all of those repositories, and user feedback pointed towards a Google model of searching inside the organisation," said Vanessa Hose, Manager, Knowledge & Information Services.

"The ability to ensure appropriate access control with ISYS was very important for us," said Hose.

Since 2006 Victoria has operated a shared TRIM environment for the Departments of Treasury and Finance (DTF), Premier and Cabinet and the State Services Authority. There are around 1300 users across all three departments that use TRIM to varying levels.

TRIM 6.2.2 is part of the standard operating environment (SOE) that is packaged up and deployed across the three organisations. It integrates with Lotus Notes email and Microsoft Office 2003 running on Windows XP. Victoria's Department of Treasury & Finance provides business support for all three organisations. The Victorian government IT shared service provider CenITex delivers



Vanessa Hose, Manager, Knowledge & Information Services at Victoria's Department of Treasury & Finance, admits, "There are huge challenges for organisations such as ours in dealing with the large volume of information that arrives daily, and we need to look at how much of it we can automate to remove some of the administrative burden from our staff."

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infrastructure and database management for TRIM.

"We have a departmental KM strategy and obviously the role of an EDRMS is very important in the information and content management aspects of that strategy," said Hose.

"We are looking at TRIM 7 and what opportunities that gives us to leverage TRIM better in business applications, and for making TRIM available through portal-type functionality on our intranet.

"We are aware of the integration between SharePoint and TRIM and it's on our radar but we don't have any immediate plans to implement SharePoint.

"Attachments on our intranet are generally TRIM links and increasingly we are finding people will send around TRIM links through email. We may at some point in the future look to imposing a technological limitation on the size of an email that can be sent internally to encourage this practise."

Treasury & Finance manages state budget development and provides economic and financial policy advice to government, as well as coordinating government services and contracts.

The majority of documents it generates are for internal review and collaboration while all incoming correspondence is scanned and registered into TRIM at the point of receipt. There is no OCR or automated classification applied to incoming documents at present and this is something the department is planning to address.

"We're exploring options including looking at what we can do with the Kofax technology that we already have," said Hose.

"There's a high degree of collaboration around certain processes between Treasury and Premier and Cabinet. Because of the decision to have two separate TRIM databases, there is a level of complexity around how we work together. We also need to collaborate with many other parts of Victorian government around a range of activities including budgeting and financial management.

"We are looking to improve email integration within the next few months. We're about upgrade Lotus Notes to version 8.5 and we will be working to improve the integration as part of that project."

eDOCS delivers for NZ council

Palmerston North City Council in New Zealand has gone live with Open Text Document Management, eDOCS Edition (eDOCS DM) and Open Text Records Management, eDOCS Edition (eDOCS RM). The software is being used by approximately 450 staff across all business areas of the Council.

The main drivers for a document management solution were the need for stricter document version control and a desire for more consistent use of terminology, thus enabling easier searching of electronic records. The Council was also looking for a way to facilitate greater inter-departmental collaboration.

Liz Stockley, past Information Manager, Palmerston North City Council, says, "Across the Council we were very careful in the way we managed our own records but it was not always easy to share information between team members."

The deployment is the culmination of a pilot project which saw Open Text trialled by the Council's Development Services, Environmental Health and IT departments between 2003 and 2009. The extensive pilot period meant that when management approved an organisation-wide roll-out in early 2009, it took just four months to plan the implementation, four months (September – December 2009) to complete the deployment to the Central Administration Building and two months (February – March 2010) to include all remote Council facilities such as its laboratory, depot and libraries. The deployment also involved successfully integrating eDOCS DM with the Council's geographic information system and core financial and regulatory systems.

The first records to be digitised and made available on eDOCS DM were those related to the Council's central business district. A rolling program of scanning is now being conducted for all other property records. Workflow processes have also been introduced to help manage frequently used services such as Land Information Requests.

The Council anticipates that electronic access to records will enable staff to locate documents from any department faster and more easily, leading to improvements in customer service speed and accuracy.

The IT aspects of the project were supported by a significant internal communications program which familiarised users with the document management tool prior to the go-live date. The program aimed to ensure that staff understood what the new system would mean for the organisation; what it would mean for them as individuals; and finally, how to actually use the system once it was up and running.

Stockley says, "When we began the technology was all there and ready to work, so it allowed our main focus to be on the change management, education and training."

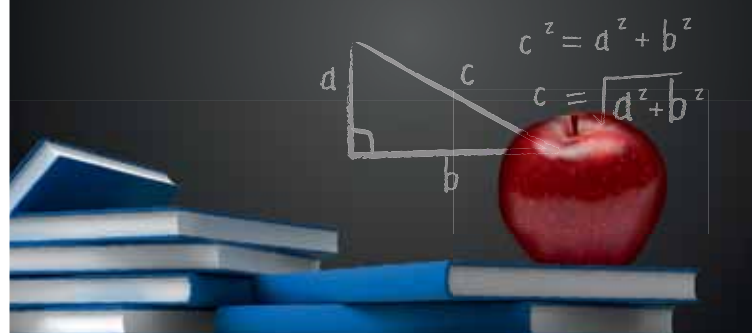
Stockley adds, "eDOCS DM from Open Text is definitely going to improve our management of council records and will make inter-divisional processes easier. We anticipate a significant reduction in storage space with only one version of each document being retained on the network. Although it was not the driver for this project, we also expect that eDOCS DM will assist the Council in its compliance with the Public Records Act."

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NortonRose centres on WorkSite

A document management system is the equivalent of a factory assembly line for law firms, especially major entities such as Norton Rose Australia (previously Deacons Australia) that specialise in corporate legal services, where documents effectively represent their transactions.

The process of drafting a complex contract that can run to hundreds of pages may take months of collaborative development, and the document management system is essential to its success.

More than 1000 users of Autonomy's Interwoven WorkSite at NortonRose in Australia are now able to access a centralised database of WorkSite content that is available nationally and internationally through a customised portal that also integrates content from the company's CRM platform and practice management system.

WorkSite was initially adopted in 1996 by Deacons, and its use had evolved over more than 10 years to encompass an extraordinary volume of content held in separate databases in Sydney, Melbourne, Adelaide and Brisbane.

In 2009, the firm's IT professionals realised the critical need to combine databases from its multiple locations into a single, centralised system. After a considerable period of trial-and-error, Norton Rose selected the Workspace Manager (WSM) product from DocAuto to achieve the desired result.

Of more than 18 million documents held across the country, NortonRose eventually chose to migrate more than 7 million to a centralised Autonomy iManage WorkSite repository that related to current matters, while archiving the rest.

Philip Scorgie, Director of Business Information Systems at Norton Rose Australia, said, "We used Workspace Manager to perform our data migration into the new matter-centric system. This

"EMAIL VOLUMES HAVE EXPLODED, AND NOW WE CREATE ABOUT 350,000 OBJECTS A MONTH AND 75% OF THESE ARE EMAILS."

saved weeks of work if we had needed to develop custom migration scripts. We now have full control over our WorkSite system."

At first, centralisation seemed overwhelming. The firm sought a comprehensive tool to replace a manually run and error-prone migration process. What was needed was a move to become matter-centric – involving a replacement for the existing multiple State-based databases, while preserving features for cross-office collaboration, an overall classification structure, with consistent standards and effective security.

The firm worked with multiple outside resources to achieve a solution. Elaborate scripting tools were developed, but ultimately



with less than acceptable results.

"We had quite a large investment in WorkSite as a product and there was no real reason to look at another product, it would have been too disruptive and WorkSite is very strong in the legal market," said Scorgie.

"When you migrate from one database to another you must merge documents and generate new document numbers using some sort of process, there are a number of ways to do this.

"When you put all the documents in the new database you want to be able to generate the matter-centric folders and the relevant folder structure - where to put the documents and who has access to them. There's a whole bunch of security that needs to come across and that security is quite complex because within a WorkSite database you can have different levels of security on folders and documents, etc.

"The third thing is you need to identify what you need to bring across during that process, so you don't slow down the process by bringing across unnecessary content. This needed to be informed by our practise management system so it could tell what files are open and which ones are not, so they don't need to be brought across.

"It might just be a lot of data sitting in a SQL database but it could not be solved just by writing a few scripts to do it. After a few weeks attempting the job ourselves we realised it was going to delay the whole project so we went to DocAuto and their Workspace

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Manager (WSM) tool. We took one look at it and realised this does what we wanted to do out of the box."

Norton Rose then turned to DocAuto and its Australia partner, Office Information Australia (OIA). OIA is the regional distributor for Autonomy iManage, as well as for DocAuto.

DocAuto analysed the firm's current situation and proposed improvements that would be achieved by applying Workspace Manager "out-of-the-box" to meet specific needs. WorkSpace Manager was used to create temporary "holding" WorkSpaces, which could be used to drive the centralisation process in a controlled and phased approach. This was necessary due to Norton Rose's huge volume of content.

DocAuto applied the concept of "differential ageing" with the temporary WorkSpaces, to achieve bulk copying of content at the desired pace. Thus, content could be moved as modified, over time, to the new databases. This approach presented a controlled, safe and gradual way to migrate from a distributed environment to a centralised single database.

Norton Rose became able to identify and prioritise source, content, and data; migrate it to the centralised destination; and manipulate the metadata on the way. Within two weeks, the firm realised better results than they had achieved with the previous five months' effort.

The firm reported saving months of time while WorkSpace Manager took only overnight; and also claimed the saving of \$50,000 in consulting fees.

Norton Rose had already developed a sophisticated e-mail management system in-house, effectively capturing and filing millions of messages per month by using a simple Wizard in Outlook. This further increased the need to have a robust process for centralisation.

"The content of our WorkSite database has changed dramatically since we have implemented the email management system in the last two years," said Scorgie.

"In 1996 when we first implemented WorkSite we were adding 50,000 documents a month and 98% of these were Word documents.

"The ratio has switched wildly since we have begun filing emails in the system. Email volumes have exploded, and now we create about 350,000 objects a month and 75% of these are emails."

NortonRose has developed a layer "dashboard" on their intranet that brings together all data pertaining to a particular matter including contacts from the CRM system, client data from the practise management system and documents and emails on WorkSite

"Moving to a matter-centric platform means that when lawyers are working on a national file they are able to access all related documents held in the one centralised location, which requires them to be held in the one database," said Scorgie.

"The matter-centralisation has made it easier to present information via the portal, as it now only needs to go to one central database instead of four."

"What we are achieving here is the ultimate aim of a completely electronic file, migrating away from the traditional physical version and that is quite a mountain to climb. The move to electronic courts has had a big impact on that. Often courts will want to discover files and when they are physical files or not covered by a matter number then it is very difficult to do that.

"Another major benefit for us of having a comprehensive electronic file is that it allows us to devote resources nationally and internationally to work on that one file, whereas if that's a physical file it's only able to be worked on by the staff in one office.

"Now it doesn't matter where they are located, which means we can now pull in experts from around the world to work on matters where we couldn't have done that in the past."



Philip Scorgie, Director of Business Information Systems at law firm Norton Rose Australia, oversaw a massive migration to a centralised deployment of Autonomy's Interwoven WorkSite.

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Barwon Water tames information flow

Victoria's Barwon Water has taken the next step into its digital future by enhancing its Objective enterprise content management (ECM) platform with an EzeScan capture and workflow solution.



The ECM rollout has now been completed and rolled out to 420 users utilising the document and records management functionality and scanning middleware from Australia's EzeScan.

A Property Inquiry Application (with Internet frontend) was also implemented in late 2008, and Barwon Water has worked closely with EzeScan's professional services team to help achieve the maximum utilisation of the scanning/indexing/OCR/upload process.

Since implementing Objective, Barwon Water has found that document flow and duplication has been significantly reduced by the use of a function-based file classification structure and an organisation-wide approach to the availability and sharing of documents.

All incoming correspondence is scanned, registered into Objective and distributed automatically as a reference link via email to the applicable Action Officer.

The ultimate aim is to make Objective act as a single point of access for all customer information.

EzeScan solutions have been implemented for the capture of corporate data from correspondence and corporate documents, using an automated routine that distributes registered images by email reference link to the applicable Action Officer. The body of the email provides directions and a list of all metadata associated with the document.

EzeScan's Fabian De Angelis, senior technical lead on the project, says that Barwon Water has deployed great project management skills to get each individual project in the business up and running successfully.

"From the EzeScan document scanning perspective they made

sure that every workflow was streamlined as much as possible to ensure that not one keystroke was wasted of the EzeScan operators time. They are using 100% of our functionality and it is singing along very nicely," he said.

EzeScan is used by Records Staff to scan and register 'Correspondence – Inward' objects. At the Barwon Water South Geelong Office, EzeScan is used to register 'Property Service Document' objects used within the 'Property Inquiry Application' system

FOR ANY ORGANISATION MOVING TO A DIGITAL ECM PLATFORM, INTEGRATING EXISTING RECORDS IS A DAUNTING TASK.

EzeScan has also been configured to inherit object metadata from parents, browse Keywords and apply all custom catalogue metadata.

As part of the pre-scanning document preparation process (e.g. sorting, removal of staples, etc.) a single barcode is placed on the front page of every document (single and/or multi-page). The documents are then batched and placed on the scanner's automatic feeder.

The scanning software uses the barcode as a document separator and automatically populates the barcode field within the 'Correspondence – Inward' object. Once scanned the documents are stored in a daily batch folder within an applicable archive box.

The barcode is also useful in locating the original hardcopy document (e.g. if a page is misfed or of poor quality and re-scanning

Hunter Water tackles TRIM integration

If Terry Seiver, Trim Administrator at Hunter Water had one wish for document management, it would be to have a platform that would facilitate better integration with other corporate systems.

"I would also like the solution to be more intuitive for users who aren't trained in records management."

"We are looking forward to implementing SharePoint integration with TRIM which will facilitate improved records capture while offering seamless Office integration and collaboration amongst staff," he said.

The Hunter Water Corporation is a State-owned Corporation providing water and wastewater services for over half a million people in NSW's lower Hunter region. An organisation wide roll-out of TRIM at the state-owned corporation was completed in 2006. There are currently around 670 users on V6.1, including 400 office workers, 200 field staff and a number of contractors.

The Standard Operating Environment is currently Windows XP, Office 2003 and Exchange 2003

Some of the main priorities for the TRIM rollout included improved governance, better records management, improved business efficiency, regulatory compliance and better risk management.

At present all final documents are saved into TRIM and/or scanned to a TRIM container. Hunter Water has not yet commenced incoming mail scanning, although this expected within a 2 year time frame.

All staff are individually responsible for scanning their records into TRIM, and internal collaboration is assisted in TRIM by people being able to email TRIM references to each other, with multiple people able to view a document at the same time. All approvals are managed through TRIM. This includes financial, functional and project approvals.

Siever said "We are at the planning stage for TRIM to

integrate with Microsoft SharePoint, which will be used as our Intranet platform. We integrate TRIM with our SCADA system and are looking to integrate with our ERP system which is currently Eclipse."

"Emails are saved into the relevant TRIM containers but titling is an issue. A Document Naming Convention has been put in place, but again, since it's up to each staff member, the quality of titling varies greatly," said Seiver

Hunter Water still maintains its repository of plans and photographs in hard copy form, around 30,000 items to be scanned. It has begun to assay the task of digitally archiving/backscanning old photographs in the future once they have been indexed.

TRIM was chosen by Hunter Water owing to its compliance with requirements of the NSW State Records Act (1998).

"Metadata is critical to a successful document management system, and audit mechanisms are essential. While we typically take an open access approach to information, the ability to have security access controls is important so confidentiality of information can be protected when necessary," said Seiver

One of the main challenges of implementing an EDRMS is always user uptake. "Staff were accustomed to using legacy processes which include paper-based files and network drives, so getting them to adopt the new system was, and still is, a challenge," said Seiver

"Pockets of staff still like to avoid using TRIM. Building TRIM into business processes and training in small groups helps to break down barriers."

"We have also had a lot of Freedom of Information applications and "order for papers" from NSW Parliament, and this demonstrates the importance of good recordkeeping in TRIM."

is required) as the user can quote the barcode number and date scanned so that records staff can easily find the document.

By completely separating the scanning task from the registration/indexing process, EzeScan enables concurrent activity with some staff concentrating on high volume scanning tasks whilst other staff are completing the registration/indexing process on separate PCs.

Document workflow

During the indexing process, the EzeScan software has also been configured to allow the cut and paste of image data into fields using OCR (e.g. for subject/title sentences, Installation No's, Reference detail, etc.), dragging & dropping File numbers and Groups from Objective plus direct access to Keyword lists.

EzeScan has added additional functionality to its core product to support Barwon Water's Objective Keyword Browser requirements. All of the EzeScan workflows are customisable and can be easily imported/exported to other EzeScan PCs.

For its dedicated scanning requirements, Barwon Water has acquired three Fujitsu fi-S750C A3/A4 flatbed scanners, a KIP3000 and one Contex Cougar G600.

All faxes that arrive are received on Toshiba MFPs and automatically distributed via email to records staff to register into Objective and allocate to the applicable Action Officer. Corporate emails are received by Records registered/distributed in the same manner.

For any organisation moving to a digital ECM platform, integrating existing records is a daunting task.

Barwon Water has completed the job of migrating 30,000

engineering drawings, previously versioned and scanned, into Objective.

Over one million images were migrated as part of the implementation of the 'Property Inquiry Application' system and there are now over 2.1 million document objects stored in the ECM.

The next stage is to implement the drawings management module and replace the in-house drawings management system with the ECM for storage and version control, then migrate the associated legacy records.

There are a mix of Microsoft operating environments on the Barwon Water intranet, including Windows Terminal Server 2003 (the general operating environment) running the Objective 7.3.4 client.

At the backend, Objective is hosted in a centralised SAN on a Sun Solaris Application Server while Windows Server 2003 and Windows Server 2008 (ECM Rendition Server) are also part of the mix, running on HP Servers and Blade Systems including VMWare (ECM Rendition Server).

Mobile workers are able to access documents in the Objective repository via Next G and Windows terminal server.

Via Objective, Barwon Water has been able to reduce the cost of document retrieval and reproduction by ensuring all documentation is securely stored in a single repository.

With the addition of a comprehensive scanning and workflow solution from EzeScan it has now moved to bring all correspondence and corporate documents under the same umbrella for enhanced compliance and manageability.

Accounting DMS ticks all the boxes

Paperless processing is delivering dividends for HLB Mann Judd, one of Australia's leading accounting firms.

The Sydney operation of HLB Mann Judd implemented the fully fledged document management system, Autonomy WorkSite, in 2006. There are 10 member and representative firms across Australia and HLB International operates in over 100 countries. Each branch of the firm pursues an independent IT strategy, to support its operations that include corporate finance and auditing, tax consulting, business consulting, superannuation and financial planning.

Much of the firm's interaction with clients and the Tax Office is paperless, as its APS accounting software accepts files directly from MYOB, and other financial packages used by mid-tier firms. However there are some clients who persist with manual paper-based processes.

Kylie Grant, Business Process Manager for HLB Mann Judd, looks after the software systems that underlie those processes. Kylie came into her role when the firm had already made a decision to acquire Autonomy (or at the time Interwoven).

She lists the reasons for acquiring WorkSite as a way to militate against risk and ensure easier retrieval of documents in the future. The firm did not undertake a major back-scanning program.

"Before we implemented WorkSite there was actually no integration between our filing system and our practice management system, so everything was just stored on Windows Explorer folders," said Grant.

"Anybody could create a folder, and there was no standardisation for naming. At the highest level it was generally accepted that it was just the client name, but then what was created below that was just up to the individual's discretion. So it was quite messy, and it could be quite difficult for people to find things. So if an auditor came to work in business services who didn't know the file structure, it could be quite difficult to locate documents.

"In October last year we restructured the whole system and we changed to matter-centric, so now WorkSite is integrated with our practice management system, and as soon as a client is added to practice management, that client is created in Work Site.

"Also, now when the client is created and a matter is set up for the client, we have a standard XML template that recognises the matter type and sets up a folder structure of a specific layout, so for tax returns we'd have working papers and correspondence and email folder, and it's exactly the same for every client who has that same matter.

"We have found just for the visual organisation of documents, our users really love it, so I think it's been a fantastic change that they've gone back to that folder kind of structure rather than the flat filing space that they started out with.

"It did not require a lot of development; the functionality was all right there in the software, although the version that was available at the time, we did have to do a few little workarounds to make it work the way we wanted, although they've just released a new version, the latest version of Work Site 8.5.

"It now has a tick box, so you can just click the button and it ticks a box to say this is a matter-centric implementation and therefore a document must be placed into a folder. While there wasn't a lot of development, it definitely was a very big planning process and required a lot of thought and user consultation about how things needed to be structured."

The majority of documents that arrive are delivered electronically, and those that arrive on paper can come in a range of formats. HLB Mann Judd is working on transitioning to scanning all of the source documents that come from clients, and placing them into the client folders in Work Site. The WorkSite folders are



"There are dozens of document-dependent processes that we could automate. I suppose much of this could be done without a DMS but I certainly think it will make things easier having a filing structure that's directly linked to the practice management system and also on a SQL database where there's no question about whether it's the right place to file it as long as the client ID and matter ID are known." - Kylie Grant, Business Process Manager for HLB Mann Judd.

only available to desktop users on the HLB Mann Judd intranet and extranet, and options for mobile access are being explored.

Another project on the To Do list is a client portal, which could potentially be implemented using the WorkSite Web product. This would allow the ability to tick a box to expose documents to clients via the Web.

"I think it could be quite useful to some clients to have instant access to things like their accounts, previous tax returns, trust deeds, company constitutions, etc. if they're not inclined to manage their own copies of those documents," said Grant.

"I envisage that if we were to implement a client portal, we'd probably wrap a workflow process around the exposure of documents to ensure only appropriate material gets exposed. Who it gets exposed to would potentially be quite a complex thing to determine for the larger client groups and we'd definitely want to put a lot of thought into that in the planning phase.

"Needless to say, at least part of the security would come from our practice management system to determine which individuals are part of the client group and which entities of the group one could access documents for."

The firm is also beginning to redesign traditionally manual processes into a digital workflow, using a COTS BPM product (Orbis Task Centre).

The first process involving WorkSite documents that is being automated is the e-delivery of tax "Notice of Assessment" to clients, an estimate of payable or refundable tax.

"We receive these in paper and have traditionally mailed them to clients. We're currently designing a process to scan them, scrape the data and insert to APS, save the PDF to WorkSite then email the PDF as well as the relevant scraped details to the client and save the email.

"The current paper-based process requires four different people to touch it. The new process will require only one person to touch it once (unless there's a problem with the assessment which would require investigation)."



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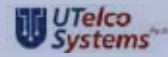
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When the heat is on



Document management is complex enough in the average office environment, but when you factor in the difficulties of an industrial workplace there are additional challenges that come into play.

The unique challenges of delivering instructions and documentation to industrial workers at O-I Asia Pacific, the region's leading manufacturer of glass packaging, have resulted in the creation of a platform known as the Work Instruction System.

Developed in partnership between O-I Asia Pacific and Eye Media Australia, this is used to provide shop floor access to documentation held in an Open Text document management system.

If you drink a beer, wine or soft drink tomorrow the chances are it is bottled in a product from one of O-I Asia Pacific's 10 glass manufacturing plants across Australia, China, New Zealand or Indonesia. In 1998, Parent company O-I (Owens-Illinois) Inc acquired Australia's ACI, a company with a rich history that dates back to the 1870s. O-I today employs more than 22,000 people worldwide (around 3500 in Asia Pacific) with 78 plants in 21 countries.

John Mulvany, Content Management Specialist at O-I Asia-Pacific, has led the development of a platform to provide industrial workers with simple and intuitive access to essential documents.

"When I go to the airport I can get information quickly and easily from a nearby screen/Kiosk. Our workers should have a means to get information just as fast and just as simply," said Mulvany.

The WIS is in the process of being integrated in the company's OpenText eDocs document management system and will be available in the Melbourne, Adelaide, Penrith, Brisbane and Auckland plant operations.

WIS provides an intelligent tool that assists in developing content to guide workers in understanding any process involved in the manufacture of glass containers.

When developing content, users of the WIS tool are provided with preset fields that add mouse-over functionality and hints on value adding content. It also helps the user to structure their content

by breaking the tasks into identifiable Headings, Work Steps, Key Points and Settings.

The creation of drop down lists is automated and photographs are automatically resized to 350 pixels to keep file sizes to a minimum (350 pixels is the maximum that can be seen on a standard monitor).

It incorporates Lean Six Sigma principles for process improvement such as 'Valued Added Time' analysis.

WIS documentation is accessed by plant workers via dedicated PC touchscreen kiosks that ensure that it is always only two clicks to navigate to any Work Instruction/Procedure.

The kiosks are pre-programmed to stay logged-in around the clock with an

identification that knows their physical location, through the Plant Access Channel Configuration built within eDocs. This knowledge is used to ensure that only documents relevant to that particular location are displayed on the screen.

This provides simple access to plant procedures for processes, safety and environment directly on the shop floor. It helps to ensure the retention of accreditation requirements, e.g. Safety Certification, Environment Certification and Quality Certification.

The kiosks are also used to provide employee training at the work station and provide 'on-site' reference material for Kaizen/6 Sigma indicatives.



A Welcome Screen to the O-I Asia Pacific Work Instruction System providing shopfloor access to a Hummingbird Document Management system.

Net scams cost Australians \$70M

The Australian Competition and Consumer has blamed Internet scams for defrauding Australians of almost \$70 million in 2009.

ACCC deputy chair Peter Kell said, "Scams continue to make up a large proportion of total complaints that the ACCC receives and more than 20,000 scam reports were made to the ACCC in 2009 - a 16 per cent increase compared with 2008.

"Realistically, this figure is likely to be the tip of the iceberg - given people can be embarrassed about reporting that they have fallen victim to scams and lost money in the process."

The ACCC highlight online and false billing scams as major problem areas.

"More than 54 per cent of the scam reports received by the ACCC concerned mass marketed advance fee fraud, making this the most complained about scam category in 2009," Mr Kell said.

This scam category includes advance fee/up-front payment (Nigerian style), dating and romance, lottery and sweepstakes, and unexpected prize scams.

"Nearly 70 per cent of consumers that contacted the ACCC about scams during 2009 said they were contacted by scammers via the internet," Mr Kell said.

CIOs are struggling to defuse 'trust time bomb'

CIOs are struggling to defuse a "trust time bomb" caused by employees morphing into super-users with enough network access to damage a business, warns information security expert Jo Stewart-Rattray.

Ms. Stewart-Rattray, director of information security for national accounting firm RSM Bird Cameron, recently chaired a Chief Information Officer (CIO) meeting that examined security threats associated with user privilege policies.

"It was a hot button issue for the 16 CIOs who were gathered around the table," she said.

"Many of them thought they were alone in dealing with this problem because it appeared to have an easy fix. At the end of the day, those people went away recognising that it is a widespread issue from which government and private sector organisations are suffering.

"The challenge is that addressing the user privilege vulnerability creates conflict between an organisation's security and its culture. User privilege is often associated with trust. However trust alone is not a control.

"Without adequate controls, this is a trust time bomb just waiting to explode. This is evident in the fact that we've seen high profile rogue administrators come out of the woodwork recently.

"That day, 16 people went back to work to put managing user privilege policies and the related tools at the top of the action list."

Ms. Stewart-Rattray heads up RSM Bird Cameron's IT and IS consulting group within the risk management division which assists clients to identify and reduce risks and vulnerabilities ranging from information security to disaster recovery. She is also the co-chair of an international task force that is charged with developing strategies to build intentional cultures of security within organisations.

Ms. Stewart-Rattray said the culture of excessive user privileges on computer networks had developed over many years. "People are accumulating extraordinary amounts of access that is not needed to do their job," she said.

"One example was an employee who built up a remarkable level of computer network access during years at an organisation. When a new employee joined the business, the manager said to copy the network privileges held by the long-serving employee, which is a ridiculous risk.

"Cradle-to-grave user management has gone by the wayside. CIOs are starting to recognise that there is a dire need for a life cycle management of users, but they are unsure of where to start.

"One CIO said the challenge is to balance trust with an intentional culture of security. In some respects, because trust has existed historically, we are talking about an intentional change of culture, which is harder to effect. In the beginning, security is intentional and over a period of time, it becomes automatic.

"Privileged User Management is a hot topic at the moment. A central tenet of this approach is the principle of Least Privilege. Rather than making every user a network administrator, this gives each user just the network access required to perform his or her job. Even system administrators should maintain a distinction between their privileged sys admin account and their day-to-day account.

"Businesses should aim to build security into their DNA as we have with OH&S, which has been ingrained in all of us. It's certainly not the same with security."

Data breaches cost \$2M per year: Symantec

A global survey of enterprise security by Symantec found that 75% of organisations have suffered data breaches within the past 12 months and losses are averaging \$US2 million annually. The figure was even higher in Australia/New Zealand, where 89 percent of those surveyed experienced attacks on their IT infrastructure in the past 12 months.

Craig Scroggie, vice president and managing director, Symantec Australia and New Zealand, noted that "Cyber Risk" is now rated as more important than natural disasters, terrorism or traditional crime for a company.

"The online nature of most organisations today means that they rely on their core IT infrastructure, whether its email or CRM applications to do business."

"Malicious code is a top concern, and the big shift we see is that the attacks are now in the information, not just the infrastructure. People want to get onto your machine for the purpose of getting into it, rather than the purpose of disabling it."

The study is based on surveys conducted in January 2010 of 2100 enterprise CIOs, chief information security officer's (CISOs) and IT managers from 27 countries (125 responses came from Australia, 75 from New Zealand).

Nearly all the enterprises surveyed (94 percent globally and 100 percent in ANZ) forecasted changes to security in 2010, with almost half (48 percent globally and 42 percent in ANZ) expecting major changes.

Every enterprise surveyed experienced cyber losses in 2009. The top three reported losses globally were theft of intellectual property, theft of customer credit card information or other financial information, and theft of customer personally identifiable information.

In ANZ, the top three reported losses were theft of corporate data at 53 percent; theft of customer personally identifiable information at 53 percent and identity theft at 37 percent. These losses translated to monetary costs 92 percent of the time.

The top three costs were productivity, revenue, and loss of customer trust globally and loss of data (49 percent); damage to brand (37 percent) and lost revenue (31 percent) in ANZ. Enterprises reported spending an average of \$US2 million annually to combat cyber attacks.

Symantec found that enterprise security is becoming more difficult due to a number of factors. First, enterprise security is understaffed, with the most impacted areas being web security (52 percent in ANZ), network security (49 percent in ANZ), messaging security (49 percent in ANZ), data loss prevention (46 percent in ANZ) and endpoint security (43 percent in ANZ).

Second, enterprises are embarking on new initiatives that make providing security more difficult. Initiatives that IT rated as most problematic from a security standpoint include infrastructure-as-a-service, platform-as-a service, server virtualisation, endpoint virtualization, and software-as-a-service.

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Cracking a solicitor's safe

David McGrath goes behind the complex ediscovery issues raised in a recent federal court judgement, which centred on the contents of a laptop computer hard drive held in the Sydney office safe of solicitor Fiona Shand.



In handing down judgement in the case of *Porter v Australian Prudential Regulation Authority* on 25 February 2010, Justice Nye Perram remarked, "How an image of Mr Porter's laptop computer's hard drive came to be in Ms Shand's safe requires a slight digression."

For the second time, APRA was being hauled before the court to justify why it should have access to the contents of the disk drive.

Why did APRA want to get its hands on it so badly that it was prepared to face the pain and potential humiliation of another successful challenge to its powers?

On the last occasion, the court had described APRA's actions as reprehensible, ordered it to pay all of Mrs. Shand's costs and directed it to provide a copy of its reasons to its chairman.

We pick up this story on the afternoon of 3 July 2009 as four persons descend on the offices of Austfam in Sydney.

Austfam is a company that was in what is known in the insurance industry as "run-off". This is where the insurer writes no new insurance business leaving it only to meet liabilities to existing policyholders as they arise.

In 2001, Austfam's insurance portfolio was transferred to Trans Pacific Insurance Corporation (TPIC), meaning it was now their responsibility to pay any outstanding claims.

TPIC's collapse in April, 2009 precipitated the whole chain of events in regards to the contents of the safe of Fiona Shand, the solicitor acting for Ross Porter, Austfam's managing director since 1989.

TPIC's collapse exposed claimants against Austfam policies to the risk they would not be paid.

On 3 July 2009, a court ordered that management of Austfam's

affairs be handed over to a judicial manager i.e. an external administrator. In the judge's own words, the judicial manager "acted swiftly to give effect to that mandate".

Access was requested to Ross Porter's laptop in order to take a forensic image of its contents. Mr Porter objected that it contained information relating to AFA Insurance and completely unrelated to Austfam. Moreover, some of those documents may be privileged. He called on his solicitor, Fiona Shand, to intercede.

(It should be noted that at no time has it been suggested that Mr Porter had done anything wrong. He continues to run a separate accident and health insurance business known as AFA Insurance.)

Not unsurprisingly, given that it was late on a Friday afternoon, negotiations over an appropriate access protocol failed. The hard drive was taken by the judicial officers over the weekend for safekeeping. After further negotiations fail, the hard drive is reinstalled in Mr Porter's laptop.

A forensic image of the hard drive is copied to a 1.5 TB Seagate hard disk and handed to Fiona Shand. Access issues are put to one side while the judicial manager decides whether he really needs to inspect it.

Fast forward to 9.50am, Wednesday 5 Aug, 2009. APRA serves a notice on Ms Shand requiring her to produce the hard drive to APRA by 4.00pm that day. Failure to comply carries the risk of three months imprisonment.

At 3:55pm, Ms. Shand urgently applies to the court for relief. That relief was denied on technical grounds leaving Ms. Shand technically in breach of the notice.

The notice was subsequently found to suffer from a number of problems. APRA ultimately consented to an order setting it aside after the judge ruled they could not proceed on it.

One of its difficulties was that it sought production of the Seagate drive itself which may have contained materials either unrelated to Austfam or subject to privilege.

APRA criticised

APRA's behaviour attracted heavy criticism. Simply issuing a notice requiring production of the hard drive in just two days was considered unreasonable. The fact that it then waited until the morning of the last day to serve the notice on Ms. Shand leaving her just six hours to comply was described as reprehensible. APRA offered no explanation to the court as to why it acted in this way.

In the judge's view, APRA simply failed to understand the "seriousness of the position in which it had placed Ms Shand" and, at times, acted in a manner "indicative of ethical obtuseness".

The judge took the highly unusual step of ordering APRA to pay Ms. Shand's costs on an 'indemnity basis'. This meant that APRA had to pay all of Ms. Shand's costs not just those considered reasonable when assessed against a court scale.

On Thursday 20 August 2009, APRA tried again.

This time, the notice gave Ms Shand two weeks to comply and APRA attempted to serve it on the day of issue.

This notice did not require production of the hard drive. Rather it gave specific details of "categories of books" relating to the affairs of Austfam on the hard drive which Ms. Shand was required to produce. This successfully dealt with the objections concerning the production of material that was either extraneous to the affairs of Austfam or potentially privileged.

Forensic formats

For Fiona Shand, this raised issues similar to those found in a typical e-discovery. First, she did not know how to access the data on the hard drive which was stored in a protected forensic format. The judicial manager's office had described the process as expensive and complicated and that even an IT person could not do it without special skills and software.

Secondly, Ms Shand claimed not to know enough about the affairs of Austfam to assess the responsiveness of the material to the notice. Finally, Ms Shand now had the burden of restoring,

WHILST THE JUDGE ACCEPTED THAT IT WAS PROBABLY DIFFICULT FOR MS. SHAND TO ACCESS THE DATA, HE FOUND IT WAS STILL POSSIBLE WITH THE ASSISTANCE OF AN EXPERT. HE COMMENTED THAT "SUCH IMAGES ARE FREQUENTLY BEFORE THE COURT AS ARE THE EXPERTS INVOLVED IN THEIR PRODUCTION".

reviewing and producing responsive materials, a matter APRA should have considered in issuing its notice. All of these issues were raised in new proceedings to set aside the notice.

On the access issue, whilst the judge accepted that it was probably difficult for Ms. Shand to access the data, he found it was still possible with the assistance of an expert. He commented that "such images are frequently before the Court as are the experts involved in their production".

On the question of whether Ms. Shand could identify Austfam related materials, the judge again found it was possible. He commented that solicitors are frequently called on, in discovery, to assess the relevance of client material without having "any more expertise in the client's affairs than that arising from the retainer". As Fiona Shand was retained by Mr Porter she could ask him to clarify any matters that were unclear.

Finally, the judge was not persuaded that Ms. Shand's burden was a mandatory matter for APRA to consider in issuing its notice. In any event, there was technically no evidence that they had failed to consider this burden.

In all, seven objections were raised. The judge dismissed all of them upholding the notice. Fiona Shand's safe had been cracked open.

Despite the obvious difficulties retrieving documents from the Seagate hard drive, APRA never explained why it wanted to proceed in this way. The judicial manager's office had previously advised Ms. Shand that it would be far cheaper to print any documents required from Ross Porter's laptop.

Fiona Shand alleged that APRA issued the notice to assist the judicial manager who was still in the process of negotiating an appropriate access regime after having been denied access to other Austfam documents by the computer equipment's owner, AFA Insurance.

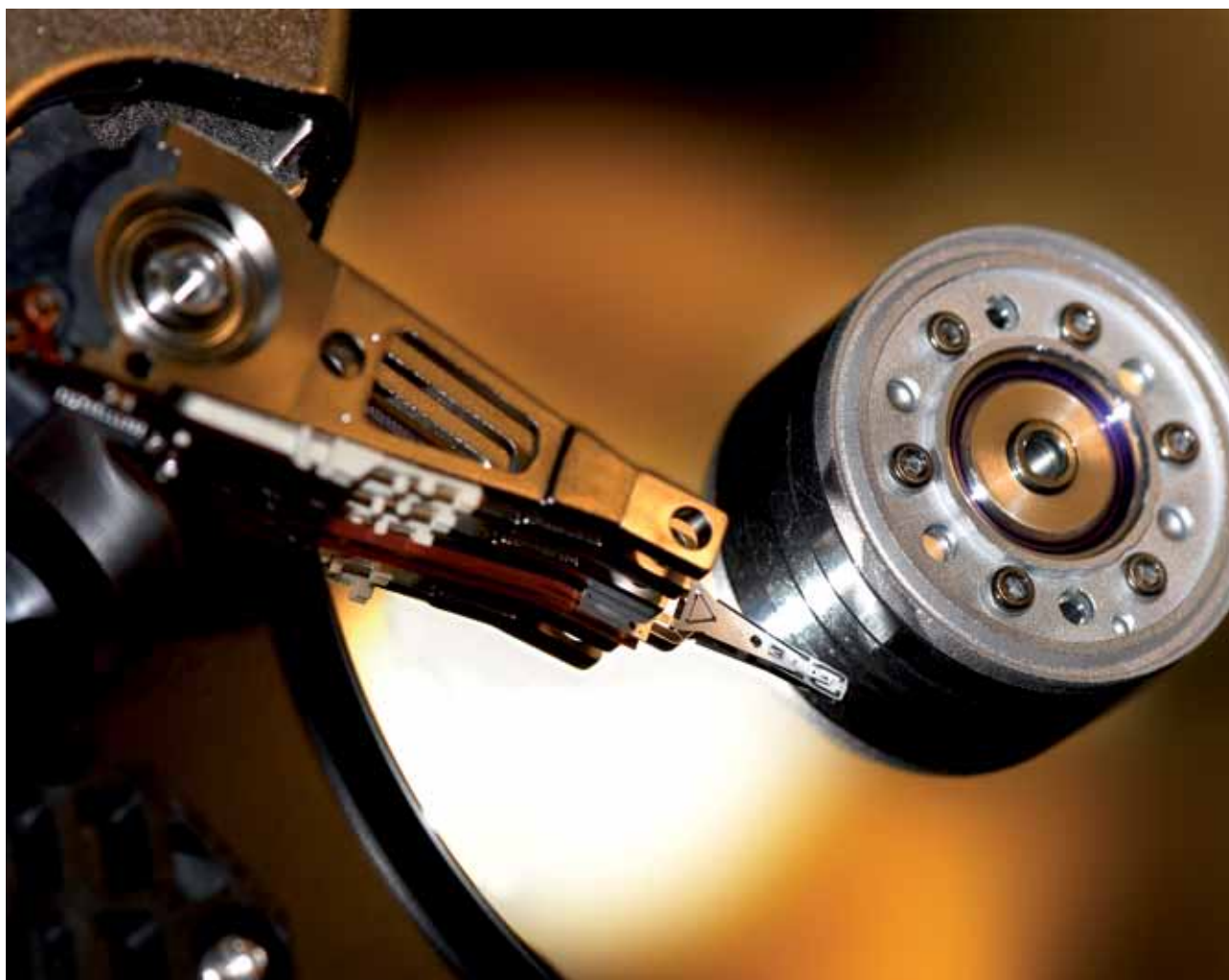
APRA's right to require Ms. Shand to produce Austfam's documents from the forensic image on the hard drive in Ms. Shand's safe was not upheld however until 25 February, 2010. With Austfam wound up and its policyholders protected, it remains to be seen whether APRA will continue to press the burden of that exercise onto Ms. Shand.



David McGrath is Director of e-Litigation Solutions. He currently provides independent e-discovery, information management and technology consulting services to corporates, law firms and the courts. David holds degrees in Law and Computer Science and post graduate qualifications in Technology Management. dmcgrath@elitsolutions.com.au

A document by any other name

Allison Stanfield examines the consequences of the judgement in *Porter v Australian Prudential Regulation Authority* [2010], where the Federal Court of Australia gave the green light for a regulatory body to get access to files on a forensic image of a computer hard drive that was kept on the premises of an applicant's solicitor.



In *Porter v Australian Prudential Regulation Authority* [2010] FCA 125, a forensic image of Ross Porter's computer hard drive had been made by a judicial manager for the purposes of the judicial management of Austfam. Mr Porter was concerned that the hard drive contained information that was not relevant to the affairs of Austfam and possibly privileged material. Mr Porter's solicitor, Fiona Shand, was summoned and it was agreed that a forensic image be made and that she would undertake to keep it in safekeeping.

APRA then issued notices seeking access to files on the forensic image, the first of such notices being held to be unreasonable. The second notice included a detailed specification of various categories of "books" which related to the affairs of Austfam.

In considering a number of issues about the notice raised by Mr Porter, it was contended that although Ms Shand had custody and control of the forensic image of the hard drive itself, she did not have custody of the files on the forensic image, because it was in a format which did not permit non-technical users to access it. Also, it was contended that because Ms Shand did not know anything about the affairs of Austfam, it was unreasonable to expect her to assess the relevance of material about which she was unaware.

The court dismissed the claim by the applicants, and granted APRA access to the files, notwithstanding the solicitor did not have the expertise to restore the files from the image nor had any knowledge of the company whose files were being sought.

Although the court held that service of a notice to show cause of an investigation of Austfam in August 2009 was incorrectly served upon the judicial manager rather than Austfam's registered address, this did not null the existence of an investigation.

Given the existence of an investigation, it was under Austfam's investigative powers to seek production of the documents. The court held that there had been no improper purpose by APRA nor was the notice unreasonable or that there was disregard for the burden on Ms Shand. Critically for the purposes of analysing this case from a data management perspective, the court further struck down arguments that Ms Shand could not access the files due to her lack of technical expertise, nor that she was an inappropriate person to review the material for relevance.

Section 55(1)(a) of the Insurance Act 1973 (Cth) gives APRA the power to serve notice on a person requiring production of "all or any of the books relating to the affairs of the body corporate that are in

the custody or under the control of that person.”

Section 3 of the same Act defines “books” as including “any register or other record of information” and “any document”. Though it was not an issue between the parties in this case, it is an interesting observation to note the way in which it was accepted upon the definitions of “document” and “record” in the Acts Interpretation Act 1901 (Cth) s25, that each of the files located on the hard drive in Ms Shand’s possession was a “book” to which s55(1)(a) refers.

This serves as a reminder of how far the legal system has progressed in incorporating and defining electronic files for the purposes of litigation. This has been considered in cases such as *Sony Music Entertainment (Australia) Ltd v University of Tasmania* (2003) 198 ALR 367; [2003] FCA 532 and *GT Corporation Pty Ltd v Amare Safety Pty Ltd* [2007] VSC 123 and it is an important point to remember bearing in mind that a forensic image is created as a bit-for-bit copy of the hard drive of a computer which means that one forensic image can contain many thousands or millions of files.

Custody and control

What was however of contention between the parties was the argument by the applicants that although Shand had physical control and custody of the hard drive as a chattel sitting in a safe in her office, she did not have custody and control of the files on the basis that she lacked the computer skills and software to access them.

“THE JUDGEMENT OF THE FEDERAL COURT REMOVES THE MYSTERY SURROUNDING COMPUTER FILES AND TREATS THEM LIKE ANY OTHER DOCUMENT OR “BOOK” FOR THE PURPOSES OF REVIEW. IT NOW MEANS THAT DOCUMENTS ON A COMPUTER ARE NO DIFFERENT TO DOCUMENTS SITTING IN A CARDBOARD BOX, AND FOR ANY RELEVANCE REVIEW, EACH DOCUMENT MUST BE REVIEWED ACCORDINGLY.”

Justice Perram rejected this argument and said “It would be easy enough for her to ask technicians from the judicial manager’s office to show her how the data might be retrieved or, if they will not, what kind of expert she might speak with to the same end. There are any number of firms in this city offering technology services of this kind. Imaging of hard drives is a widespread phenomenon in modern insolvency and litigation practice.”

To Ms Shand’s defence, she had been told by technicians at the judicial manager’s office that it was impossible for her to access the files located on the drive and had further been dissuaded by an email from another staff member that recovering the files would be “expensive, complicated and not necessary if Ross [Porter] can print them off his live computer”.

Justice Perram held this not to be evidence of the fact that the files were inaccessible but rather that Ms Shand should first consider cheaper options. The court found it unnecessary therefore to examine the issue of whether custody and control of a storage medium such as a hard drive equates to custody and control of the files contained within that storage device.

In *Sony Music Entertainment (Australia) Ltd v University of Tasmania*, Justice Tamberlin of the Federal Court found that it was appropriate to order discovery of electronic storage devices notwithstanding they may contain a wide range of other information, with the implication that such a search for relevant documents would be

conducted by a computer forensics expert who would make an undertaking as to non-disclosure and confidentiality and with the opportunity for the concerned party to see if they have any claims for privilege or confidentiality before discovery. Thus in this case, the argument raised by the applicants regarding Shand’s lack of knowledge as the factor excluding her from being appropriate for determining relevance, is a weak argument as it is not unusual for legal technology firms as well as lawyers to be the parties examining electronic storage devices for relevant files.

The issue of relevance

The applicants further opposed the notice on the ground that Fiona Shand was a person who was not well-informed enough about Austfam to review the material on the hard drive for relevance to matters relating to the affairs of Austfam’.

Justice Perram rejected this argument on the premise that it was not necessarily unreasonable of APRA to serve notice upon Ms Shand as APRA was not necessarily aware of that lack of knowledge on Ms Shand’s part but more critically that “solicitors such as Ms Shand are frequently called on, in the process of discovery, to assess the relevance of client material without having any more expertise in the client’s affairs than that arising from the retainer... No doubt, as his [Mr Porter’s] solicitor, she may seek his assistance to the extent the matters are unclear.” This would appear to be the correct conclusion and is discussed further in the next section.

Implications for Data Managers

The effect of the decision is that a forensic image possesses no mystical characterisation over and above any other form of media. The court considers that there are adequate expert resources available to restore the image back to a format in which a lay user can review the material on a computer screen. This of course, assumes that the lay users will have a basic level of computer skills in which to review the material once it has been restored.

Further, the files, once restored from a forensic format, are then capable of being reviewed for relevance to a particular issue, whether this be pursuant to a regulatory notice, a discovery or any other request for information.

The judgement of the Federal Court removes the mystery surrounding computer files and treats them like any other document or “book” for the purposes of review. It now means that documents on a computer are no different to documents sitting in a cardboard box, and for any relevance review, each document must be reviewed accordingly.

It is foreseeable that this will be an issue that will return to the courtroom in the near future given the rising prevalence of the use of electronic data in the courtroom. One may argue that given the court’s distinction between the hard drive and the files in defining a “book” as a file not a storage device is a distinction that should be retained for the purposes of determining whether a person had “control” and/or “custody”.

This case establishes that with respect to the obligations of a person who has possession of a hard drive with a forensic image and is required to produce relevant files on the hard drive, the excuse of lack of technical knowledge is insufficient in a court room.



Allison Stanfield is a founder and CEO of e.law Australia, and has recently published her second book, “Computer Forensics, Electronic Discovery and Electronic Evidence”.

Evolving the digital mailroom

Automated mail processing technologies and services are bringing new efficiencies and savings to the enterprise.

Organisations still receive reams of paper correspondence, forms and documents and will continue to do so for many years. Many have turned to automated digital mailrooms—whether outsourced or integrated into internal operations—to ensure efficient, productive, and correct processing and accessibility.

IDM asked the region's leading business process outsourcing (BPO) bureaux where the significant new opportunities lie for inbound mail processing in enterprise and government users in Australia & New Zealand.

According to Paul Bellette, general manager of Sales & Marketing for NZ Post subsidiary Converga, "We are starting to see a real take up in enterprise and government organisations in digital mailrooms. The enquiry level has increased significantly in these sectors over the last 6 months with two to three early adopters going live in that same time period."

AS PAPER BASED INBOUND DOCUMENTS BECOME A SMALLER PROPORTION OF THE TOTAL INBOUND DOCUMENT POPULATION (EMAIL/FAX/WEBFORMS), THE COST PER UNIT OF PROCESSING THOSE DOCUMENTS BECOMES SIGNIFICANTLY GREATER.

"High volume high distribution is one of the key areas, but also organisations that process forms/applications/claims currently using a manual paper process, by going electronic there is a huge upside in process efficiency and cost reduction."

There is a growth in demand for digital mailroom solutions caused by modern business practices such as hot desking, working from home and geographic expansion, so staff are not being tied to one desk in one location.

"This certainly adds to the business case," said Belette, "making the originating document digital and accessible has actually allowed for more hot desking and working from home resulting in further cost savings."

Lee Bourke, Director, Digital Execution at SEMA, sees most growth in the enterprise and government markets.

"We expect this growth to continue as enterprises continue to search for cost out and quality up initiatives," he said.

Mailroom automation helps generate strong efficiency improvements by sending customer information to where it is needed within the organisation far quicker than manual processes.

Customer transactions, requests, and inquiries are therefore dealt with quickly, allowing organisations to compete on service level as well as cost.

"Mailroom automation includes the rapid digitisation of stakeholder data," said Bourke. This data can then be processed and distributed in

real time."

"We have seen significant growth in the use of our accounts receivable solution. This solution allows same day banking and three-way matching in real and near-real time. This automation usually drives 30-50% of the cost out of the crucial business process. It also allows exceptions to be processed on the day they are identified thus reducing any major issues associated with the AR processing (e.g. frozen accounts)."



"Some customers are looking for a complete communications solution others are wanting to just digitise the mailroom to start the overall process." Paul Bellette, Converga.

The Digital Mailroom Today

When implemented correctly digital mailrooms boost compliance, reduce costs associated with opening and sorting mail, and negate misplaced mail pieces. Digital capture, indexing, and electronic distribution allow businesses to access the most current information, complete with its digital audit trail.

Mark, Josman, Speedscan CEO, said, "We typically see a 25-30% cost savings in the outsourcing of document intensive business processes, where we can use a combination of technologies (OCR/ICR/barcodes), processes, infrastructure and experience to improve a business process and deliver a better solution for the end users. Increasingly organisations are looking at single platform solutions that manage all inbound documents (mail/fax/email and webforms) and provide the data in standard agreed formats into the core business systems. BPOs are now providing organisations with a greater range of management tools such as dashboards and reports to maintain a real time view on the processes that have been outsourced."

Speedscan currently provide solutions that send automated responses (SMS/email) on receipt of certain documents to ensure that the business process continues and that all stakeholders, especially external stakeholders (brokers/customers) can be kept up to date.

"We also communicate through web services to send back channel messages to client systems and third party applications in real time. In mortgage processing for example we use LIXI compliant messaging to update our client's systems," said Josman.

"Volume is an important driver, but once again other factors such as the complexity of the business processes that follows the mail process are very important considerations. The earlier the documents are able to be managed electronically, the greater the benefit a BPO is able to deliver to an organisations business process."

Another major issue to consider is fluctuations and variations in volumes. Most organisations do not have the flexibility to handle large fluctuations in volumes. A BPO has both experience and flexibility when it comes to handling significant changes in volumes of inbound documents.

"Also, as paper based inbound documents become a smaller proportion of the total inbound document population (email/fax/



Mailroom automation includes the rapid digitisation of stakeholder data. This data can then be processed and distributed in real time." - Lee Bourke, SEMA.

webforms), the cost per unit of processing those documents becomes significantly greater. The paper documents effectively will become “exceptions” to the standard electronic process, with the resultant loss of knowledge, redundancy and experience. This is when a BPO is able to generate meaningful benefits for an organisation as it processes these “exceptions” for multiple organisations. A good example is in the Accounts Payable area, where electronic transactions are becoming the norm and paper based invoices, a costly exception.”

Before investing in a digital mailroom, consider and understand your organisation’s needs

“The greater the effort an organisation makes to understand its own business processes, the greater the benefit to be derived from workflow driven BPO solutions,” notes Josman.

“While we are all for keeping it simple, oversimplifying processes will reduce the potential benefits.”

One of the first decisions that needs to be made is whether to look to a BPO provider rather than an in-house solution.

John May is Portfolio Manager for Business Process Outsourcing at Salmat, which has about three billion documents under management, including for three of the four major banks.

May said, “If the timeframe of delivering a document or acting upon it is critical to your business, then automating it will make it quicker. In all reality now with email, there is not much internal mail that gets shipped around companies anymore, so really it’s around the business opportunities. It’s documents coming from your customers or your suppliers that you want to act on as quickly as possible.”

May believes the investment required in digital mailroom automation is probably prohibitive to a lot of small to medium businesses.

“Really all they want is the business outcome. They don’t want to be hiring OCR specialists and buying scanning machines and implementing workflow frameworks and having the IT overhead of maintaining those.

“By using a BPO we can leverage economies of scale by sharing infrastructure, resources and workflow platforms to reduce the costs a lot below the point that if someone had to buy and set it up themselves.

“There is an opportunity in organisations looking to improve service levels to retain existing customers. Mailroom automation helps generate strong efficiency improvements by sending customer information to where it is needed within the organisation far quicker than manual processes. Customer transactions, requests, and inquiries are therefore dealt with quickly, allowing organisations to compete on service level as well as cost.”

The ROI equation

What are the conditions that make it sensible for an organisation to look to a BPO provider rather than an inhouse solution?

SEMA’s Lee Bourke sees it as a simple commercial equation.

“If the volumes are significant enough then benefits can come from mailroom automation.



“There are three reasons that can drive this. Some choose to outsource their non-core functions thus getting the benefits that come from a deep concentration on core functions. Some are looking for improvements in quality that they have not been able to get themselves. Some are looking for simple cost-out of their business processes.”

Converga’s Paul Bellette believes most customers would see a benefit within 3 months and generally at least a 30% processing cost reduction.

“BPOs often offer a small implementation fee and a pay per use fee making it more an OPEX cost rather than CAPEX and thus a greater ROI,” he said.

Salmat’s John May said, “It really depends on what the document type is and what the business benefits you’re looking for are.

“For claims processing, the ROI has to include the customer satisfaction in processing claims as quickly as possible and processing them as accurately as possible. If you’re talking about accounts payable, it’s how much money have I saved in not having duplicate payments, in being able to take advantage of early payment discounts and knowing what my liabilities are, managing my cash-flow better. They’re all the things that go into their ROI.”

SharePoint 2010: a glimpse of the future

Gayan Peiris previews the new and improved capabilities of SharePoint 2010, and evaluates why should you look at upgrading from MOSS 2007.

The market is eagerly waiting the new members of the SharePoint family due out on May 12, 2010.

The public beta has been available for some time and we know that the first change with the 2010 release is the name: its now called Microsoft SharePoint Server 2010. The word "Office" has been taken out hence "MOSS" is no longer applicable.

Windows SharePoint Services version four (WSS 4) is now described as "SharePoint Foundation 2010".

SharePoint Foundation 2010 provides the underlying infrastructure for SharePoint Server 2010.

MOSS 2007 had been popular as a collaboration platform in many organisations, and SharePoint 2010 promises improvements on both enterprise collaboration and public-facing Web sites in a single platform.

MOSS 2007 has been positioned as a platform for Collaboration, Portal, Search, Content management, Business Forms and Business Intelligence capabilities. There are a number of features and functionality available from MOSS to drive each capability and on many occasions the customer will simply implement a single capability to start with.

SharePoint 2010 provides features and functionality to integrate with multiple workloads to drive business value. The improved capabilities are divided into sections including Sites, Communities, Content, Search, Insight and Composites.

I am also excited by the amount of flexibility available for deploying SharePoint 2010 on premise, as hosted services or both models.

MOSS 2007 is already available as a hosted service for customers with a subset of functionality. This approach reduces the time to implement a SharePoint solution by sidestepping the hardware



The Contextual Ribbon

purchasing and implementation costs, and avoiding the operational cost of ongoing maintenance, Disaster Recovery and upgrade requirements.

SharePoint 2010 supports multi tenancy architecture and reduces the feature gap between on premise and hosted models.

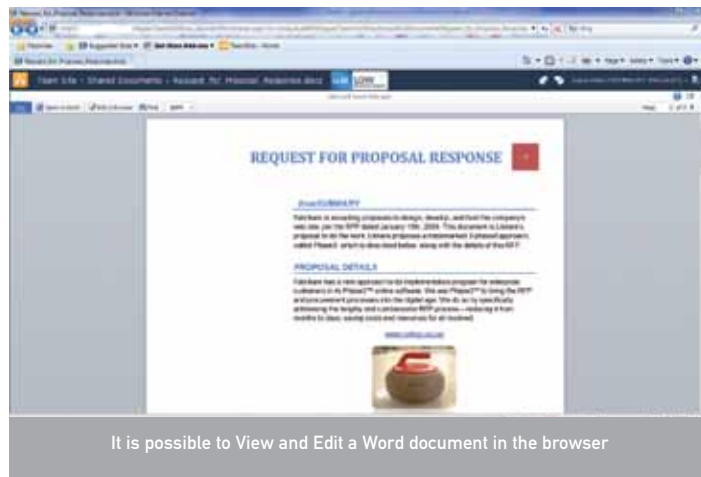
The first class user experience across PC, Browser and phone is another improvement I see in SharePoint 2010.

The ability to take your SharePoint site and content offline via SharePoint Workspace 2010 (formally known as Groove 2007), view and edit an office document in browser with supporting full fidelity and accessing your SharePoint data via your mobile device will make interacting with information and connecting with people easier.

SharePoint Workspace 2010 supports taking full SharePoint sites offline, rather than just document libraries in Groove 2007.

While I have been evaluating the SharePoint 2010 beta, I found the user experience to be greatly improved.

The contextual ribbon is now part of the SharePoint interface and that ensures only relevant options are available when you interact.



THERE IS A MORE MATURE APPROACH TO MANAGING CAPABILITIES OR WORKLOADS IN THE NEW VERSION.

For an example, it will display image relevant options when you are interacting with an image on the web page.

Live preview will reduce the time to correct mistakes and having to undo your changes when editing a page by displaying the outcome before you need to save the page.

The Web page also acts as a wiki page that gives you access to all lists and views in your SharePoint site. This will allow you to click on a place on a web page and insert content or to link documents by using brackets (as you may be familiar with in wiki pages) without having to copy and paste the URL of the content you would like to reference.

Cross- browser support on Internet Explorer, Firefox and Safari is another major improvement.

The AJAX-based usability interface has improved the user experience by not requiring page refreshes when retrieving the information.

Office Word, Excel, PowerPoint and OneNote documents can be viewed and edited on the browser as part of Office Web Application feature.

Multi-user editing in Word is another major improvement.

For example, many users will be able to open the same document from SharePoint and edit at same time.

(Continued on page 38)



Gayan Peiris is a SharePoint Technology Specialist at Microsoft Australia who has written many articles, reviews and columns for various online publications and has been a contributing author for a SharePoint book. He is a frequent speaker at Microsoft conferences on SharePoint technology.

CONFERENCE PREVIEW

Getting the most out of SharePoint

Whether you have already implemented Microsoft Office SharePoint Server 2007 or you are considering SharePoint 2010, the easiest way to get the most out of this highly flexible and comprehensive platform is by networking with others, listening to experts and being taken through successful customer implementations. That's what is being delivered at the Australia SharePoint Conference 2010 to be held between 16th and 17th June at the Sydney Hilton.

While it is estimated that SharePoint is Microsoft's fast growing product, the likely reality is that in many instances the product is not being fully utilised. According to Debbie Ireland, Conference Convenor, while thousands of Australian businesses, government departments and local offices of global organisations have implemented SharePoint, they are probably only utilising around twenty to thirty percent of its potential.

Said Ms Ireland, "To take your implementation beyond that of a common 'point solution' to one of an integrated platform that readily supports multiple applications or business-specific functions, often requires looking at how other successful organisations, regardless of size, have achieved far-reaching benefit from their SharePoint implementations. That is just one of the many reasons for holding this year's Australia SharePoint Conference.

"Australia hasn't seen a SharePoint conference of this magnitude since back in 2007, where the focus was on the then newly introduced SharePoint 2007 platform.

"Now, several years later, we've not only seen a huge adoption of the product, nationally, but we're also about to embark on the next version of the product, namely SharePoint 2010, due for public release on 13th May 2010 AEST. So, the conference is perfect for those wanting to understand more about SharePoint 2007 and also learn about the new SharePoint 2010 release."



Included in the Keynote delivery is Arpan Shah, Director at Microsoft Corporation (Redmond, WA) who owns Technical Product Management for SharePoint Products and Technologies.

The conference will be co-attended by local and international SharePoint community members, including Microsoft SharePoint Most Valued Professionals (MVPs) and SharePoint user group leaders. The conference boasts an impressive array of speakers, including well known international SharePoint speakers, like SharePoint MVP's Todd Bleeker, Randy Williams and Tobias Zimmergren.

With over 40 sessions to choose from, the conference is structured in three major streams; Business, Technical, and Voice of the Customer. Voice of the Customer is a very popular track where companies share case studies of their experiences, successes, and challenges implementing SharePoint within their organisation. There are also additional "Get to the Point" Training Workshops before and after



"One of the significant benefits in the conference format we have structured is the opportunity to network with peers, learning from each other just how to spread the power and deliverables of SharePoint across disparate company departments and structures." - Debbie Ireland, Conference Convenor.

the event. Running over two days, the conference is expected to attract around 800 delegates who will be able to visit exhibition and information booths, attend workshops, learn from motivational customer case studies and partake in educational seminars. The conference's Platinum Sponsor, Microsoft Australia, acknowledges the importance of community-led conferences such as Australia SharePoint Conference as complementary extensions of Microsoft's existing SharePoint resources and events.

WITH OVER 40 SESSIONS TO CHOOSE FROM, THE CONFERENCE IS STRUCTURED IN THREE MAJOR STREAMS; BUSINESS, TECHNICAL, AND VOICE OF THE CUSTOMER.

"We are delighted to support Australian SharePoint Conference and the community members who are making it happen. The event looks set to support and empower the SharePoint community by bringing together customers, partners, professionals, and enthusiasts to share their experiences and expertise. We are also impressed with the quality of speakers who will help deliver value to participants whether they are technologists or from the business," said Sophie Corker, SharePoint Marketing Manager at Microsoft Australia.

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Each user will see the other's changes on their own document and communicate in realtime via Microsoft Communication Server.

The Wikis and Blogging capabilities are improved with built-in content rating, tag cloud navigation, reusable content and media support. Users will be able to tag, rate and comment on content and sites everywhere.

The mySite has also been greatly improved with a user interface which has multiple tabs. The public facing mySite support activities include photos, presence, status updates, social book marks, ability to display user information, interest, subject matter expertise, recent activities, a notice board or a wall and an organisation chart.

The organisation chart can be viewed as a traditional tree controller or as a Silverlight web component with rich user interface with the support for organisational browsing. You can also access all your tags and notes and manage your colleagues at the same tab interface. You will be able to search for people with subject matter expertise in your organisation as part of their capabilities and receive news feeds from your colleagues that you are interested in.

The Document Set is a new feature that allows you to group your documents together as a logical set. For example, a tender may contain multiple documents such as word, PowerPoint and Excel documents.

You can group these documents as a single document set and attach metadata and send the complete document set in a single workflow for an approval or set an expiration policy.

SHAREPOINT'S SEARCH ENGINE HAS IMPROVED SIGNIFICANTLY AND ACTS AS A SEARCH OFFERING AS PART OF THE SHAREPOINT STANDARD LICENSE.

Documents in SharePoint contain a unique document identifier making it possible to track the document including its moves around the SharePoint environment.

The Content Organizer feature supports routing content to appropriate locations based on content type or metadata values.

Hierarchical Taxonomy structures are also supported in SharePoint 2010. Customers can set up enterprise-level taxonomy or a term store to use in metadata tagging, keywords or in search activities. Organisations also have the flexibility of having multiple term stores if they required.

Metadata driving navigation components and key filters will make it easier to find the information.

Another improved area in SharePoint 2010 is Digital Asset Management, with dedicated video, audio and image content types. There are built in repositories to manage this content such as an asset library and a built in tool such as Silverlight media web part to interact with the content.

Multiple documents can be selected from the Document library making it possible to delete multiple items or Check-in/Out multiple items in a single click. Word, Excel, PowerPoint and OneNote documents contain two new menu items - open in the browser or edit in the browser. Rating capability is also built in with list and libraries. The workflow status will be visually represented in the status page rather than just text information. Only deltas will be transmitted on update Office documents instead of the full



document using less bandwidth in your network.

SharePoint 2010 out of the box supports WCAG 2.0 AA accessibility standards.

SharePoint's search engine has improved significantly and acts as a search offering as part of the SharePoint standard license. FAST Search is part of the SharePoint enterprise offering. SharePoint search has new features such as wildcards and phonetic name lookups. The search results page contains navigators in the left hand side so that it will be possible to filter search results by focus or expertise.

People search results now have the ability to display recent content and browse a person in the organisation hierarchy, making it possible to interact with the search results. The content search result page lets you browse the Office documents in the browser without having to download the document.

FAST for SharePoint will support navigators with the exact item count, document preview, related searches and thumbnails on the search result page. The relevancy is enhanced by user tagging and rating. SharePoint search results will be displayed in the Windows 7 desktop and Windows phone devices as part of federated search capability.

Excel services have improved with interactive pivot tables, spark lines and data slicer capabilities.

Visio Services is a new capability of bringing Visio 2010 in to the SharePoint environment to visualize the data and interact. In addition you can access the real time visual data via the browser when the Visio diagram is connected to a data source.

You can also use Visio to implement your workflows. The business users can map out the business process in a Visio diagram and then pass it to a SharePoint Designer 2010 developer.

Business Connectivity Services (BCS) is the next generation of Business Data Catalog (BDC). BCS supports read write capability for your line of business applications. BDC only supported read only capability in MOSS 2007. BCS applications can be run on range of clients including word, Outlook and InfoPath.

Access Services allows you to publish Access databases to SharePoint and to centrally manage them with versioning support.

Above are some of the feature sets and concepts that captured my attention in SharePoint 2010 beta. There are many more improvements available in the product for developers and administrators that I haven't been able to cover in this article. However more information is available at <http://sharepoint2010.microsoft.com> where you can see a feature comparison between 2007 and 2010 SharePoint.

Is SharePoint 2010 the answer for document management?

Noel Williams of MacroView is one Australian developer excited about the opportunity to create enhanced document management solutions with SharePoint 2010. In this article he explains why.

MOSS 2007 has been dismissed as a poor cousin by traditional document management vendors, but it is already the case that you can create highly functional document management solutions based on MOSS 2007.

To create such solutions you need to have an uncommonly good understanding of SharePoint and also the right add-on software. At MacroView we have developed our DMF add-on specifically for this purpose.

Document Management solutions based on MOSS 2007 + MacroView DMF are now in use by customers around the world. In some cases these solutions have replaced File Shares and Public Folders; others have replaced an existing document management system and are already handling millions of documents. In every case the feedback for these DMF solutions is that they lead to a marked improvement in user satisfaction with SharePoint.

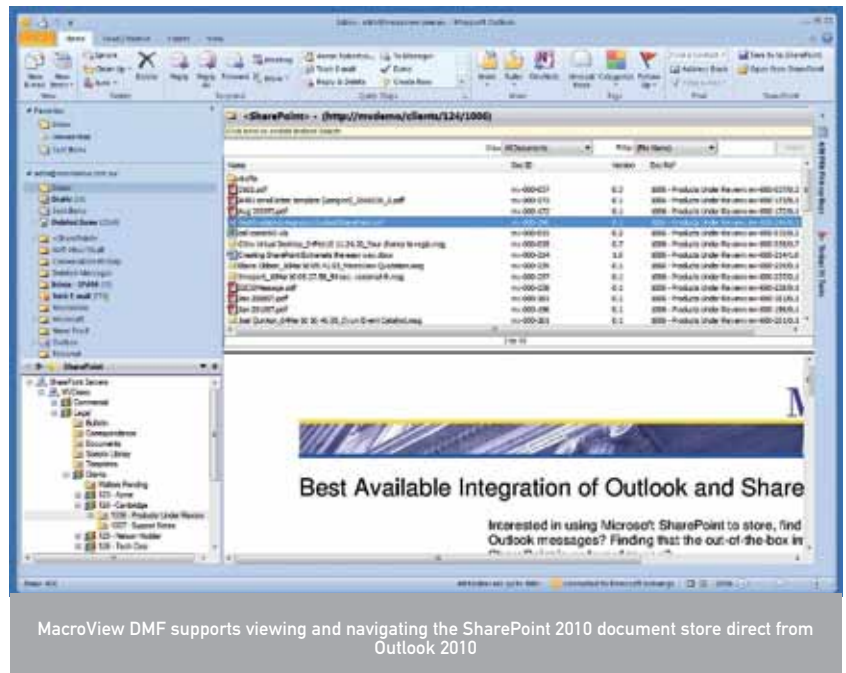
The new release, SharePoint 2010, will provide an even better platform for creating document management solutions - solutions that are decidedly easier to manage, that provide much greater storage capacity and more DM features and functionality. In this article we will explore a number of aspects of SharePoint 2010 that are important in this regard.

How will end-users feel about Document Management solutions that are based on SharePoint 2010? Will they find such solutions easier to use and more effective than DM solutions that were based on SharePoint 2007? There are a number of improvements in the user interface for performing DM tasks in SharePoint 2010 and Office 2010, but some key weaknesses still remain, particularly in the end-user interface within Microsoft Outlook.

We believe that SharePoint 2010 will open up fantastic opportunities for third party products such as MacroView DMF, which provide excellent integration between Outlook and the DM capabilities of SharePoint 2010.

Scalability

A major improvement with the 2010 release arrives in the form of improved scalability. SharePoint 2010 now has the ability to store and manage much larger volumes of documents, so Microsoft has answered the '2,000 item limit', a criticism frequently aimed at



MacroView DMF supports viewing and navigating the SharePoint 2010 document store direct from Outlook 2010

MOSS 2007. Microsoft's Adam Harmetz has publicly commented that with SharePoint 2010 "You no longer need to work around SharePoint to achieve scale."

Some of the most important improvements in SharePoint 2010 include higher limits on the number of items in a document library (up from five million to tens of millions), automatic indexing (including composite indexes) and Remote Blob Storage (which will allow Site Collections to contain more documents by moving the bulk of the document content out of SQL Server).

Microsoft is talking about SharePoint 2010 document stores that range from hundreds of documents (for small collaboration teams) to large enterprise archives with hundreds of millions of documents.

Enhanced Metadata Support

One of the big breakthroughs with SharePoint 2010 is support for managing Content Types and metadata at the enterprise level. With SharePoint 2007, Content Types and Site Columns were managed within each Site Collection and keeping these metadata definitions consistent across all Site Collections could require a lot of Administration effort.

The new Content Type Syndication and Managed Metadata Services make it much easier to have consistent metadata structures across all Site Collections in an organisation - if necessary across multiple Server Farms.

As organisations became more familiar with SharePoint 2007, they often became increasingly aware of the need for 'cascading' look-ups and other forms of metadata that had a hierarchical structure, because this makes it easier to navigate and use large, complex taxonomies.

With its Term Sets mechanism, SharePoint 2010 provides native support for hierarchical taxonomies. Users can be permitted to add additional terms to the taxonomy, so that such metadata



Noel Williams is the Managing Director of MacroView, a Sydney-based Microsoft Gold Partner specialising in solutions based on Microsoft SharePoint and Microsoft Office. MacroView develops and markets a range of add-ons for document management and document preparation (see www.macroviewwisdom.com).

classification schemes grow and adapt over time (becoming a 'folksonomy'). Metadata-based navigation is another new feature of SharePoint 2010 that will be very helpful to users who need to find documents in large document libraries. SharePoint 2007 provided the ability to filter the items in a View by selecting metadata values that were present in that View. This metadata-based filtering has now been greatly expanded so that the filtering is across the whole library and defined intuitively by selecting Pivots and Key Filters (indexed attributes). Metadata-based 'pivots' provide a dynamic filtering and grouping capability that is similar to the 'virtual folders' in a traditional DM system.

Folders & Document Sets

When it comes to designing a SharePoint document store, the basic building blocks of Site Collections, Sites, Document Libraries and Folders are all still present in SharePoint 2010. Good existing SharePoint 2007 designs will continue to work well in SharePoint 2010. The Folder is one building block that has been given enhanced capability in SharePoint 2010 and as a result, a clearer role.

In SharePoint 2007 it was already possible to define permissions at Folder level. With SharePoint 2010 you can also define Retention Policies, default metadata and available Views at Folder level. In addition the SharePoint 2010 Content Organiser mechanism can automatically route files into specific Folders based on the metadata captured as those files that are saved to a Library.

Whereas in SharePoint 2007 Folders were a means of working around the 2000 item limit to achieve large document libraries, they are now a means of achieving specific content organisation and record keeping tasks.

Note that using nested Folders in a Document Library to reproduce a deeply nested folder structure from a File Share drive is still not a good design practice in SharePoint 2010. Instead of such nested Folders, having more Document Libraries will be optimal in terms of providing automatic metadata and maintaining a desired standard structure within the document store.

The Document Set is a new feature of SharePoint 2010 that is already receiving positive reaction from prospective users. A Document Set is in effect a specialised type of Folder that has its own customisable 'landing page' to describe its purpose and usage.

In addition to being a way of grouping related documents within a Document Library, Document Sets extend the user experience when generating new content. An example is selecting a Document Set called 'Sales Proposal' from the 'New' menu to simultaneously create initial versions of a submission DOCX, a presentation PPTX and an XLSX for quotation calculations. For many organisations Document Management is about the full life-cycle of documents, and the Document Set is a useful step forward in this area.

Unique Document Numbering

From the Document Management perspective, a key new feature of SharePoint 2010 is its Unique Document Numbering. With out-of-the-box SharePoint 2007, documents were assigned an ID that was only unique within a Document Library. SharePoint 2010 allows you to have document numbering that is much closer to that found in traditional DM solutions.

The numbering that ships with SharePoint 2010 is unique across a Site Collection and by careful use of prefixes can be made unique across an organisation. These unique Document IDs can be used to locate a particular document, even if it has been moved from an original library location, e.g. to an archive Centre.

Support for working with documents while you are Offline is another area of improvement with SharePoint 2010. The SharePoint Workspace concept in SharePoint / Office 2010 will enable users to read and collaborate on changes to documents in a Library, even when some of those users are only occasionally connected to the central SharePoint server.

Changes made are automatically synchronised back to the SharePoint 2010 document store. SharePoint 2007 supported

copying documents for access while offline, but not resynchronisation back of changes.

A key source of user frustration related to SharePoint 2007 was the lack of an intuitive tree-view of the overall SharePoint document store, which made navigating and using SharePoint feel awkward compared to the familiar trees of folders in Windows Explorer and Microsoft Outlook.

The new 'Open in Windows Explorer' feature on the SharePoint 2010 document library Ribbon is a definite step forward in this regard. It allows you to view the SharePoint Site / Library / Folder tree as a tree of Windows Explorer folders. It also supports drag-and-drop moving of documents between Libraries in the same Site, maintaining version history and metadata. It is also easier to register your favourite document webs and libraries so that you can access them from Word 2010, Excel 2010 and PowerPoint 2010.

Outlook Integration

However, to a large extent, user satisfaction with SharePoint 2010 as a document management platform will be determined by how easy it is to access the SharePoint 2010 document store while working in Microsoft Outlook. This emphasis on access from Outlook stems from the fact that email is now a primary channel for business communications. Vendors of traditional DM systems such as Autonomy / Interwoven Worksite and OpenText eDocs / Hummingbird DM recognize this need and have made Outlook a primary means for accessing their proprietary document stores.

A frequent complaint about Outlook 2007/SharePoint 2007 integration was that it was not possible to drag and drop email messages or attachments to save them to SharePoint. This situation is not significantly improved with Outlook 2010/SharePoint 2010.

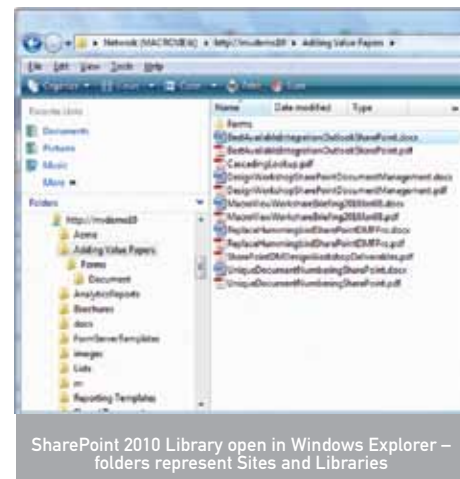
There are a number of third party add-ons that improve the integration of Outlook with SharePoint so that users can drag and drop to save emails and attachments. These add-ons vary as to whether you can save to and/or view all or just some specially-registered document libraries and folders, but generally they save the messages so that they can be re-opened in Outlook, capture email attributes automatically and improve attachment handling.

MacroView Document Management Framework (DMF) is designed to provide a full range of document management capabilities on the Microsoft SharePoint platform, including excellent integration between Outlook and SharePoint.

MacroView DMF adds a custom pane to the user's Outlook environment that displays a tree-view of all areas of the SharePoint document store for which that user has access permission. DMF supports drag-and-drop saving to any Library or Folder in this tree, as well as drag-and-drop moving and copying of documents between Libraries (including Libraries in other Sites and Site Collections). The DMF pane facilitates navigation in very large SharePoint document stores and also provides an intuitive interface to the SharePoint Search engine, directly from Microsoft Outlook.

MacroView DMF also adds customisations to Word, Excel, PowerPoint, Adobe Reader / Acrobat and Windows, so that working with the SharePoint document store is a consistent experience across all these business applications.

SharePoint 2010 provides a significantly improved platform for document management. By combining SharePoint 2010 with add-ons such as MacroView DMF you can create DM solutions that are full-function, highly scalable and popular with end-users.



SharePoint 2010 Library open in Windows Explorer – folders represent Sites and Libraries

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ECM as a Framework for IT Governance

Andy Wang, Director of ECM Strategy for Laserfiche, considers SharePoint's impact on enterprise content management.

What role does SharePoint play in the overall ECM picture? How has Microsoft's emergence in the space helped or hindered the ECM landscape?

Andy: SharePoint plays a very unique role in Enterprise Content Management. It is neither your traditional definition of ECM nor is it not. At a recent Laserfiche Analysts, Consultants, & Experts (ACE) Q&A Panel at Empower 2010, a Gartner and an IDC analyst both described SharePoint as an interesting platform that indeed has value proposition; but not necessarily all the same as when people think about ECM today. If anything, I believe SharePoint brings another dimension of value proposition to ECM. Rather than looking at how SharePoint fits in the traditional definition of ECM, it is more likely that ECM will be redefined.

So before considering whether that helps or hinders the ECM landscape; first understand that SharePoint significantly changed the landscape. Good changes, too, I might add. Records Management propels into the limelight, image and capture tools become more important than ever, and ECM becomes an infrastructure play.

What ECM features and functionality does SharePoint provide? What ECM features and functionality does SharePoint lack? Is SharePoint an ECM solution in and of itself? Should SharePoint be viewed as a competitor to existing ECM systems?

Andy: Not a question I like, because if you accept the notion that SharePoint really isn't traditional ECM then I believe the focus should be on what value does a solution that encompasses SharePoint and content management technology provides. Nonetheless, a good description of SharePoint I hear often is that it is a very thin and long horizontal piece that leaves a lot of white space for depth. SharePoint 2007 provides a very good set of rudimentary ECM capabilities such as document collaboration and basic web content management. It is easy for user to adopt, and does a chunk of document management.

SharePoint 2010 stands to enhance all of that with a stronger emphasis on Records Management. If you ask some Microsoft folks, SharePoint provides everything you need in a content management solution. But is that true? First, let's skip over the astonishing fact that SharePoint does not have imaging capabilities. It's hard to understand the strategy of creating an extra layer between the point of content capture and creation versus managing the content, but I can accept SharePoint giving way to letting expert partners do their thing. What about Workflow, though? SharePoint builds on a popular workflow engine: Windows Workflow Foundation (WWF). A common knock on WWF is that everything requires programmable work. SharePoint Designer supposedly combats a lot of this; at least the marketing messages say so. As we know in high tech, there is often a lag time between hype and adoption, or sometimes reality.

One way to look at this is that solutions that allow a true drag and drop and empowering experience to easily create workflow rules off the same WWF engine, such as Laserfiche's Workflow 8, would not be popular if the out-of-the-box experience of SharePoint's workflow capabilities already adequately address customer expectation.

When it comes to SharePoint coexisting in the ECM vendor ecosystem there's a matter in the degree of intensity. Some ECM vendors view SharePoint as a competitor. Some ECM vendors say they view SharePoint as a partner but actually view it as a competitor. Some ECM vendors view SharePoint as a partner because they lack current ECM functionality.



SO MUCH LIES IN THE FUNDAMENTAL UNDERSTANDING OF WHAT SHAREPOINT IS AND IS NOT AND WHAT ECM WILL BE, THAT RIGHT NOW THE CONTENT MANAGEMENT SPACE STANDS TO BE DEEPLY DIVIDED ON HOW THEY FEEL ABOUT SHAREPOINT, THOUGH NOTE THAT THERE IS A HIGH DEGREE OF CONFORMITY WHEN IT COMES TO TALKING ABOUT COOPERATION AND INTEGRATION WITH SHAREPOINT.

Finally, some ECM vendors such as Laserfiche view SharePoint as a partner because it will complete an ECM solution once the definition of ECM changes. So much lies in the fundamental understanding of what SharePoint is and is not and what ECM will be, that right now the content management space stands to be deeply divided on how they feel about SharePoint, though note that there is a high degree of conformity when it comes to talking about cooperation and integration with SharePoint.

We have the most public customer application success stories of SharePoint plus Laserfiche, and I think it will be interesting to see which ECM vendors truly embrace SharePoint 2010.

How is SharePoint impacting ECM purchasing habits? Is its role confusing to the end user community? If so, what do end user's need to know about SharePoint to clear up the confusion?

Andy: This is a question that Laserfiche has more authoritative insights on because of our largest content management footprint of 28,000 customer organisations and our strength of being able to reach into both the largest of enterprises as well as the small and medium size organisations. Yes, SharePoint's role is confusing to the end user community. For one, they didn't really have to buy

it. A common theme I see is a particular customer suddenly finds that they have SharePoint, and in good reason decide now is time to make good use of the solution. But the user's understanding of SharePoint is minimal. While they do exist, rare is it the CIO or IT Director that truly understands the value proposition SharePoint brings to the table alongside an ECM solution, so it's very reasonable that there is confusion.

With that said though, people are still buying ECM. I sure would have loved to say that the SharePoint hype and confusion slowed down ECM purchasing habits because then Laserfiche's 10% 2009 revenue growth would seem that much more powerful, but the reality is an informed customers know that solving actual business problems such as case management and customer on-boarding is a more definable success measure and the return on investment is equal or more important to exploring

SharePoint, and therefore purchases still happen for EMC vendors that are strong in transactional content management and repeatable processes.

Why are so many traditional ECM vendors clamouring to partner with Microsoft and integrate with SharePoint? Why are so many new ECM platforms emerging that are built exclusively for use with SharePoint?

Andy: It's a big pie and everyone wants a piece. I can't speak for the entire industry, but there are clear synergies between SharePoint and a content management solution that drives the need for integration.

First and foremost, hype has caused the customers to demand it and therefore we ECM vendors tend to have to provide it. Second, SharePoint provides a great opportunity for a lot of ECM vendors that has a less comprehensive product suite to attach itself to a long horizontal piece. There are also vendors such as Laserfiche that sees how existing vertical use-case scenarios can be enhanced through one thing that SharePoint does really well: portals, and thereby take advantage of that.

Ah, new ECM platforms emerging built exclusively for use with SharePoint is an interesting topic.

I know of several soon to be released and in development, and there certainly are some that's already talked about. I think the first answer is stack versus stack. There exist very few pure-play content management solution providers that, as an organisation, do not interfere with Microsoft in some way.

You have the class of arch-rivals such as IBM and Oracle. You have EMC with its storage, Open Text's quite extensive M&A-induced product portfolio that conflicts with everybody in some shape or fashion, and the list goes on and on. An ECM platform built exclusively for use with SharePoint shows commitment even if the entire stacks otherwise would conflict. Another is of course what Microsoft wants.

I've been in several conversations with Microsoft's team where one of the first questions asked is always the depth of integration and how nicely does the two repositories play together. Is there push-pull of file plans? Is the integration more than just front-end imaging? I think a lot of ECM vendors are in a hurry to wash away the existing stigma their integrations, brand it as a 2.0 effort, if you would, to catch up with those of us that already developed a seamless two-way integration that affects dynamic content generation.

What are some best practices for integrating SharePoint with traditional document management systems? How has this been done successfully? How can it fail? Is it necessary?

Andy: First step should always be to understand what the purpose of the integration and what the business problem this integration will solve. More configuration and less customisation is the key to maintaining an integration that works and is affordable, especially when you factor in the total cost of ownership of a document

management plus SharePoint solution. There are generally two scenarios I see among Laserfiche's customer application success story of SharePoint plus Laserfiche. The first is the more common scenario of existing Laserfiche customers suddenly find that they have SharePoint and need to do something with it. Fortunately for these cases, the Laserfiche SharePoint Integration is already a component that comes out of the box and there is enough use case scenarios provided as education materials and discussed at user groups to ease the transition and lay down foundational best practice steps.

The more interesting scenario is when a customer has SharePoint and after a period of time realises that more needs to be done to fully solve a problem. I have seen an increasing trend of this in the last 9 months, and expect to see even more. Without a doubt, it is necessary to integrate SharePoint 2007 with a content management solution.

At one Gartner conference last year I recall an attendee walked up to Mark Gilbert, Research VP at Gartner, to talk about his organisation's success using just SharePoint, and Mark's response clearly indicated they were the extreme exception to the rule. Again, properly addressing the strategic initiative discovery and figuring out what the problem to solve is the key. After that comes understanding what is within the arsenal to use to address said problem, and then putting the right tools to use. Sounds fairly complicated, but it's what a new breed of happy Laserfiche customers already done and shared their tale.

How do you think SharePoint will change the face of the ECM industry over the next 5 to 10 years? What will its ultimate role be? What's keeping Microsoft from embedding more traditional ECM capabilities in future iterations of SharePoint?

Andy: The good thing about Microsoft is that it broadcasts its intent clearly and early. There are some things we know that SharePoint 2014 currently plans to do and some things it doesn't do. But regardless of that, SharePoint has really become a late-era evangelist in the content management industry. On one hand, content management was approaching its final stages of maturity and acquisition. On the other hand, a fresh player like SharePoint comes out swinging and changing the landscape.

I am very excited about the vitalisation and future of the content management over the next 5-10 years as ECM becomes an infrastructure standard and ECM redefined. I believe Microsoft, like other content management vendors that will still be standing 5-10 years from now, will have its strategy adapted several times over from now until then. There isn't anything keeping Microsoft from embedding more traditional ECM capabilities in future iterations of SharePoint other than their own good sense of where it makes sense to partner up and where it makes sense to self develop or acquire. Today Microsoft is in partner mode.

Tomorrow, we do not know. Organisations of any industry often have to reinvent and redefine relevancy. Content management is no different. It is plausible for Microsoft to move in a direction that causes a general lose-lose for itself and other vendors of the content management space. More likely though, it'll be a coexistence and a redefined ECM that brings more true value to customers of content management.

Do you have any other comments about this topic?

Andy: Looking at SharePoint and content management from an integration point of view is often not the best approach at reaching the real value proposition. At Laserfiche we strongly believe in looking at how best of breed technologies come together to best solve a business problem. SharePoint offers a new set of tools to solve problems.

Customers and ECM vendors alike, and Microsoft, will be wise to recognise the value of SharePoint plus content management, and not treat it as mutually exclusive or heavily overlapping.

Recall guarantees digital destruction

Recall has announced the launch of a new secure data destruction service for digital media, Ensurepacs.

"What we have created is a self-service model, where companies or departments keep a supply of Ensurepac secure satchels on hand, filling them as needed with digital media, and then simply sealing them and calling us to collect for secure destruction of the contents," said Mr Jose Da Silva, President, Recall Australia and New Zealand.

Ensurepacs are taken to a Recall Secure Destruction Centre by the company's Data Protection Services drivers. At the Recall Secure Destruction Centre, the contents are rendered unusable and unrecognisable and, when the destruction is completed, a destruction confirmation certificate is sent to the customer.

Ensurepacs are available in two sizes accommodating between two and five kilograms of media. Media can include items such as discs and tapes, hard drives, transparencies and microfiche.

"We believe this will bring peace of mind to those in charge of data centres, IT departments and digital media libraries. Customers can now know that sensitive data will be securely destroyed, and that the Destruction Certificate will satisfy the requirements of any compliance audit," said Mr Da Silva.

Recall's equipment, transport and destruction processes have been endorsed by the Australian Security Intelligence Organisation's (ASIO) T4 Protective Security Accreditation.

StorageWorks strikes at the SAN

Hewlett-Packard has recently announced two new additions to the HP StorageWorks portfolio: the HP StorageWorks P2000 G3 Modular Smart Array and the HP StorageWorks P4000 G2 SAN Solutions.

The HP StorageWorks P2000 G3 Modular Smart Array is a flexible entry-level array aimed at small and mid-sized businesses (SMBs), as well as branch offices with limited IT expertise.

The HP P2000 G3 offers 8-gigabit (Gb) Fibre Channel (FC) controller technology. The P2000 G3 can be used for enterprise departmental storage or to connect remote offices. Prices start from \$A16,366 including GST.

The HP StorageWorks P4000 G2 SAN Solution is a high-performance storage system that offers redundant components and hardware RAID to guard against disk drive failures. In addition to these features, the P4000 G2 SAN includes a Network

Kroll Ontrack for PowerControls 6.0

Kroll Ontrack has announced the availability of Ontrack PowerControls version 6.0, providing enhanced manageability for Microsoft Exchange Server 2010.

In addition to compatibility with the most current version of Exchange Server, Ontrack PowerControls 6.0 specifically supports the Exchange Personal Archive mailbox feature.

Associated with a user's primary mailbox, the Personal Archive provides users with direct access to e-mail within the archive, just as they would their primary mailboxes. With Ontrack PowerControls 6.0, IT administrators can search, restore, export and report all mailbox data, including archived items, in one centralised tool. This functionality simplifies time-intensive and intricate IT functions including: restoring single mailboxes, identifying potentially relevant data for legal discovery or compliance, and exporting data for further investigation or business continuity purposes.

It also supports the Exchange

Recoverable Items feature. Exchange 2010 is equipped with retention management policies, which allows IT to retain and place a hold on e-mail that a user has edited or deleted. Supporting Recoverable Items ensures comprehensive management of all e-mail associated with Exchange including Recoverable Items, in addition to primary mailboxes and Personal Archives.

"As companies deploy Exchange 2010, IT professionals must consider and ensure that various policies, procedures and systems can support the latest version," said Adrian Briscoe, General Manager - APAC, Kroll Ontrack.

"Furthermore, using Ontrack PowerControls 6.0 to copy existing mailboxes to the new Exchange 2010 server offers IT administrators a unique migration path that does not require an old server to be online simultaneously with the new server. This eliminates the work required to prepare an old server or capably coexist with Exchange 2010."

RAID functionality that goes one level above hardware RAID by delivering data protection at the network level against major power outage, complete system or site failure.

The P4000 G2 SAN promises to lower the price per gigabyte by up to 43 percent over previous versions while ensuring higher disk drive reliability. Other benefits include improved scalability with a SAN that starts with 60 terabytes (TB) of available storage space at less than USD\$1.50/GB.

The P4500 allows customers to scale in 12 TB increments as opposed to competing solutions which require 48 TBs. This significantly enhances capacity utilisation and allows customers to grow their storage at more reasonable rates.

The solution also offers data protection through thin provisioning, snapshots and clones. Prices start from \$A40,759 including GST.

ZyLAB launches e-mail archiving

ZyLAB, a provider of e-discovery and information management offerings, has launched new e-mail archiving and retrieval offering to enable organisations to integrate directly from Lotus Notes and Novell Groupwise.

The company said that its e-mail archiving bundle offers users the ability

to manage vast amounts of e-mail, which helps support litigation readiness, early case assessments, e-discoveries and overall enterprise information management.

ZyLAB said that the non-proprietary and open e-mail archival and retrieval offering enables users to archive e-mail in an open standard XML format, while the e-mail itself is stored as a text, HTML, MSG or RTF file. It can also perform text analytics on the unstructured e-mail.

According to ZyLAB, it can support archiving, processing and discovery of e-mails in three different ways including user-based archiving directly from Microsoft Outlook, Lotus Notes or Groupwise; convert PST and NSF files into fully-searchable collections of XML, native files for the attachments and MSG files.

In addition, the server-based archiving copies all information users want to archive, such as e-mails, and newsgroups from the Microsoft Exchange Server and stored as XML files along with any additional attachments.

Johannes Scholtes, chief strategy officer of ZyLAB, said: "All our e-mail archiving and management solutions help to manage key storage issues impacting e-mail, reduce the size of e-mail databases, and address today's requirements for litigation support and legal e-discovery, regulatory compliance and corporate governance."

www.zda.com.au

Securing the cloud

SafeNet is hoping to allay the fears that are holding back organisations from embracing cloud computing, with a new set of security solutions.

This includes Intelligent Authentication Tokens to restrict access and Secure Cryptographic Key Storage, a centralised, hardened security appliance that manages cryptographic keys, access control, and other security policies. In addition, a virtualized instance of this appliance is deployed in the cloud to replicate policies and security enforcement on the data.

Security administrators can dictate policy based on business content, documents, and folders in order to ensure only authorized users and groups access sensitive data. SafeNet hardware security modules offer centralised, FIPS- and Common Criteria-certified storage of cryptographic keys.

SafeNet provides protection of stored data through a hardened appliance that centralises encryption processing, keys, logging, auditing, and policy administration across file, application, and database systems.

SafeNet is also launching its "SafeCloud" Web site to provide organizations with a central resource for information on cloud computing and how to implement it securely within their business environment. To visit the SafeCloud site, go to www.safenet-inc.com/safecloud.

Granular Recovery for Exchange

StorageCraft has announced the availability of StorageCraft ShadowProtect Granular Recovery for Exchange, the latest version in the ShadowProtect line of backup and disaster recovery software for Windows systems and data.

ShadowProtect Granular Recovery for Exchange gives administrators the ability to restore individual Exchange mailboxes, e-mail messages or e-mail attachments, minimizing downtime following a major or minor crisis. In conjunction with ShadowProtect Server or ShadowProtect Small Business Server, administrators can restore entire mailboxes or specific information in each mailbox – such as individual e-mail messages and attachments or specific files and folders – without the need to restore the entire Exchange database. They can opt to restore the messages and information directly to their production Exchange server or to a new or existing PST file. Restoring an Exchange mailbox or e-mail message takes moments, rather than hours to complete.

ShadowProtect Granular Recovery for Exchange also allows IT professionals to rapidly migrate to a new Exchange server.

Moving users from the old server to the new version of Exchange is a simple "drag and drop" procedure.

In addition, searching Exchange backups – EDB files – to find messages based on specific criteria is a simple process. Administrators may use the search capability in ShadowProtect Granular Recovery for Exchange when e-discovery or other corporate necessity requires a search of the Exchange database based on keywords, messages sent to or from a specific domain, messages within a specified time period or messages with specific subject matter.

ShadowProtect Granular Recovery for Exchange will simplify the task of restoring, migrating or searching an Exchange database. It will save hours of work and help administrators maintain business continuity. ShadowProtect Granular Recovery for Exchange also simplifies Exchange management by quickly creating reports on Exchange usage. Administrators can run reports on messages by mailbox, messages by date, attachment statistics and domain statistics.

infoXpert delivers ediscovery module

infoXpert has announced the planned release of the infoXpert eDiscovery & Federated Search module for 2010.

This portal product is designed to change the way organisations discover content that exists in the wide range of local and remote storage areas. infoXpert eDiscovery module will provide a single unified web portal that can provide a single federated search across all the local and remote resources and present the results within a single web page.

It aims to save time by allowing users to perform a single search instead of multiple sources separately, and discover information that may "hidden" in obscure databases. There will be improved utilisation of electronic subscriptions and a "One Stop Shop" to search across all organisation resources (including Sharepoint, Windows Network Drives, Email Archives, Library Databases, Electronic Journals and the infoXpert eDRMS).

The infoXpert eDiscovery module (incorporating Federated Searching) is planned for release during mid 2010.

HELIOS optimises Time Machine

HELIOS Software has announced two new backup software tools to enhance Apple Time Machine backups to HELIOS EtherShare UB+ network volumes.

HELIOS Image Builder and HELIOS Browser together offer customised backup disk images and status monitoring for

automated and secure server-based backups of Mac clients in any networked environment. The new HELIOS Image Builder lets admins limit the size of each backup disk image to optimise the disk utilisation of the HELIOS EtherShare backup volume. Creating individually sized backup disk images enables network admins to use a single HELIOS EtherShare volume to back up many Mac clients. The ability to set the segmentation size of a Time Machine backup disk image provides optimised integration with server-based backup solutions.

HELIOS Image Builder also adds encryption support for backup disk images, to secure backup of confidential and mission critical data. Now unauthorised users, including system administrators handling backup systems, cannot access or retrieve content without a valid password. HELIOS EtherShare UB+ based backups with encryption support provide a major improvement to data protection and security. The HELIOS Browser application supports system administrators with quick status overviews for easy administration of Time Machine based network backups of all Macs within any network. The dashboard includes complete information about when backups were started and completed. Special warnings advise if backups are overdue. HELIOS Browser frees admins from having to visit every single Mac workstation to perform a backup overview.

For more local information and pricing see <http://www.databasics.com.au/helios/>

StorageWorks LTO-5

HP has announced the expansion of its Linear Tape Open (LTO) technology portfolio with upgraded HP StorageWorks LTO-5 Ultrium tape drives, delivering improved data transfer speeds and management capabilities.

Available with the HP StorageWorks MSL tape libraries, these new archive solutions enable businesses to better manage information through enhanced data protection, disaster recovery as well as long-term data retention operations.

HP StorageWorks LTO-5 tape solutions improve backup performance and reduce data loss with built-in encryption. This prevents unlawful access in the event of theft or malicious use by encoding data to ensure it is unreadable to unauthorised users.

With nearly double the capacity of LTO-4 tape drives and encryption support, HP LTO-5 drives can store more data at a lower cost while meeting data security requirements.

The HP StorageWorks LTO-5 internal drives (SAS) start from \$A4,725 (inc. GST) and the external LTO-5 drives (SAS) start from \$A4,991.

FileTek one-click content migration

FileTek has announced Trusted Edge for Intelligent Content Migration, an information classification and asset management solution.

Trusted Edge uniformly classifies, tags, and moves both new and existing content during the archive process, promising to make legacy file migration as easy as pushing a button.

The solution provides certified adapters for leading repositories, including Microsoft SharePoint, Open Text Livelink, Laserfiche, Symantec Enterprise Vault, IBM Content/Records Manager, FileTek StorHouse, and all repositories that are compliant with the WebDAV interface standard.

One of the biggest challenges facing all organisations as they implement content and records management solutions is how to handle the thousands of existing files that reside on shared drives scattered throughout the network.

FileTek claims traditional file archive applications normally bulk move data "as is" from cluttered file shares to other locations without collecting important file metadata or applying consistent rules that evaluate individual file content and business value.

Trusted Edge for Intelligent Content Migration performs automatic content tagging and reorganisation in real-time as the secure migration process occurs.

The software intelligently classifies, captures, and relocates only relevant content based on a set of preconfigured, consistent enterprise policies that can be triggered based on file path, file name, file metadata, file type, and even actual file content, thus enabling intelligent decisions about how each item should be migrated and secured.

Mark Seamans, FileTek Vice President and Chief Technology Officer, commented, "Trusted Edge breakthrough technology eliminates digital housekeeping pain and ensures corporate wellness by making shared drive cleanup and secure migration to one or more structured repositories a simple, one-click, automated process."

Adding insight to unstructured data



Symantec claims its new Data Insight technology enables organisations to improve data governance through insights into the ownership and usage of unstructured data, including files such as documents, spreadsheets and emails.

Symantec Data Loss Prevention is planned to be the first solution to fully integrate Data Insight followed by storage and information management solutions later this year.

Unstructured data on shared file systems is a large source of critical business information, and over-exposed content presents a significant risk for data breaches. Data Insight with Symantec Data Loss Prevention helps organisations identify their most critical information and enables simplified data clean-up and remediation through automated data owner identification. Data Insight also provides continuous monitoring and

auditing of data usage to help ensure adherence with corporate policies and regulatory compliance. In addition, the technology monitors who has accessed or modified individual files, and can notify information security teams and data owners that data has been exposed. Armed with visibility into who is accessing and using the information, organisations can make rule-based ownership inferences and alter access to stored data in order to prevent data breaches.

"Organisations are struggling with multiple point solutions to manage and secure their unstructured data and need products to work together to solve problems," said Greg Hughes, group president, Enterprise Product Group, Symantec. "Data Insight makes life easier for our customers by combining our security and storage prowess to improve data governance."

EzeScan finds form

Outback Imaging has made several improvements to the Key From Image (KFI) module that adds Forms Processing functionality to the base EzeScan product, and has announced support for SharePoint 2010. Designed to make document automation workflows even easier to deploy and manage, major speed improvements have been made to the Discovery module.

When processing multiple fields with Discovery, EzeScan now caches the OCR results and re-uses them. This saves significant operator time, as each field does not need to be individually OCR'd. EzeScan can be configured to beep when a KFI exception occurs. This is very handy for those semi-automated jobs that an operator may not be attending.

When an exception occurs, e.g. OCR confidence level too low, OMR group error or a database validation failure, EzeScan will beep alerting the operator to attend to the problem.

If a database lookup fails, e.g. an ABN number not found or validation has failed on a scanned invoice against a database, EzeScan will automatically popup a search screen where the operator can search by custom set fields (e.g. ABN, Supplier Name, etc). This saves the operator having to open the other application in a separate window to look for the information, as it can all be done from EzeScan.

EzeScan has also developed a new connector into DocuWare. It supports functionality like file cabinets, cabinet lookup list fields, and all file cabinet custom metadata.

Jump-starting KM in SharePoint 2010

Germany's Layer2 is offering pre-defined Taxonomy Metadata for Microsoft SharePoint Server 2010 under a partnership with WAND, Inc.

The data is ready to use as managed metadata in the SharePoint Term Store and can help to jump-start Knowledge Management (KM) projects in Intranets and Employee Portals based on Microsoft SharePoint technology.

SharePoint 2010 now offers managed taxonomies and folksonomies, expertise finding, content rating, and commenting. Enterprise metadata management is a new set of features introduced with SharePoint 2010 that enable taxonomists, category managers, and administrators to create and manage terms and sets of terms across the enterprise.

Developing a taxonomy can take considerable time, resources, and money. Depending on the complexity it may take many months, several iterations, and ongoing maintenance to continually improve the classification. In cooperation with WAND, Inc, Layer2 now offers pre-defined Taxonomy Metadata for SharePoint Server 2010 covering a wide variety of domains to help jumpstart classification projects.

imageFLOW 2.0

Paradigm Imaging Group has announced the release of imageFLOW 2.0 – an enhanced version of their document imaging software.

Able to interface with all current Graphtec large format scanners, Paradigm's imageFLOW 2.0 boasts faster scanning speeds and other enhanced features such as:

- Scanning presets for a variety of color, grayscale and black and white formats;
- Over 550 included printer drivers;
- More than 325 certified ICC profiles;
- Color calibration wizard for editing existing ICC output profiles;
- Custom media creation;
- Batch scanning and job set creation; and
- Interactive, intuitive user interface.

A variety of large format applications such as document archiving, copying, reproduction and file communication are managed seamlessly without extensive operator training. imageFLOW 2.0 provides optimised default settings for a variety of original document types including maps, drawings, blueprints, photos and posters, thereby providing touch-button operation for many projects involving large format scanning and copying.

SharePoint gets more social

NewsGator has released a native social iPhone client for SharePoint as well as a microblogging suite. The iPhone client, and a companion client for the soon-to-be-released iPad, provide direct access to enterprise social computing environments without the need for a browser.

As a mobile client for NewsGator Social Sites, the iPhone client accesses updates from the user's colleagues and communities.

Mobile users can use an iPhone to:

- send status updates, videos and photos to Social Sites;
- comment on and "like" valuable updates;
- see notifications when others comment on or like your updates;
- participate in community discussions;
- target a question to a person or group;
- see the updates that you're radiating to others;
- view updates from a specific colleague or community; and
- look up contact info for colleagues.

"It's not enough just to have mobile access or microblogging – what really matters is how such tools integrate with your existing work environment and processes," said Brian Kellner, vice president of products for NewsGator.

"We've learned the intricacies of productive social computing through experience with more than two million paid enterprise users and have brought that experience to bear in these new features of Social Sites that integrate seamlessly with employees' existing workflow and communication methods." The new iPhone and microblogging features are part of Social Sites 3.1.

Text analytics for stored documents

SAS is shipping a Text Analytics technology that can be used to discover opportunities and risks in social media information, call centre logs, customer surveys, claims forms, sales returns and other areas.

SAS Text Analytics automates the time-consuming process of reading individual documents and manually extracting relevant information. The technology can be used to "interpret and structure information to reveal patterns, sentiment and relationships to improve decision making," SAS said.

Fiona McNeill, global analytics product marketing manager at SAS, said, "Those involved in enterprise content; web content; document, records and knowledge management; enterprise search; article research; and online marketing

measurement can easily access and reuse information with SAS Text Analytics."

There are four SAS Text Analytics offerings: SAS Enterprise Content Categorisation applies natural language processing and advanced linguistic techniques to automatically categorise multilingual content.

SAS Sentiment Analysis derives positive and negative opinions, evaluations and emotions of customers and prospects from digital content sources, including blogs, tweets and websites, as well as internal emails, call centre notes and inquiries.

SAS Text Miner incorporates advanced linguistics into SAS' core data mining solution SAS Enterprise Miner.

SAS Ontology Management creates and maintains consistent and centralised metadata across document collections and textual repositories, so information search-and-retrieval engines can systematically identify common concepts.

SharePoint capture

IRIS Powerscan 9, the next generation of I.R.I.S.' document capture solution now directly connects to Microsoft SharePoint.

This enables the user to scan and index documents while automatically identifying document types. Those images are then converted into hyper-compressed, fully searchable PDF, PDF/A-1b or XPS files. Finally, those files are exported with their indexes into the appropriate Microsoft SharePoint document library.

This new version of IRIS Powerscan adds a Wizard to help the user configure their favorite IRIS Powerscan templates (Quick Projects or Service Packages) so they can start sending documents to Microsoft SharePoint in a few clicks.

After specifying the Microsoft SharePoint server address, IRIS Powerscan will automatically list the available document libraries. The user simply selects a library, as well as a document type.

The Wizard will also list the library descriptions, allowing for column names within SharePoint to be used as indexes. Finally the Wizard will help the user define the remainder of the process (Document separation, Formatting and OCR options).

Pierre De Muelenaere, President & CEO of I.R.I.S. said, "This complete document capture solution is based on standard components, which means an easy deployment and a rapid return on investment for both the Microsoft VARs and the end customer.

"The previous version was already able to export documents into SharePoint thanks to an optional add-on, but IRIS Powerscan 9 for Microsoft SharePoint offers a built-in connector for direct export into SharePoint. Its very intuitive interface and easy-to-use Wizard get the user up and running in no time.

People On The Move

ReadSoft has made a number of new appointments to its team, including **Jana Horn**, a graduated application developer, who joins as part of the SAP Consulting Services team. She is responsible for the delivery of SAP customisations and SAP support. Jana has over 8 years experience in the IT industry holding positions in applications development, consulting & support.



Jana Horn, ReadSoft SAP Consultant.

In his new role as Business Development Manager **Aaron Likely** will focus on selling ReadSoft's SAP integrated invoice processing automation solution to New Zealand and Government (State and Federal) in Australia. **Lee Whincup** commenced with ReadSoft earlier this year to grow the enterprise capture market in Australia. He has specialised in establishing new markets for ISVs both locally and abroad.

James Graham is the newest support member at Readsoft, starting in early 2010 in a support consultancy role. James graduated at the University of Wollongong in 2009 with a bachelor of Internet Science and Technology.

Former Sales and Marketing Manager, **Colin Birney**, previously with Online Learning Australia, has joined Australian Web solutions provider **Squiz** in the role of Business Development Manager. The role will be based in Melbourne, with the Victorian region currently experiencing significant



Colin Birney, Squiz BDM.

growth. Former APAC Business Development Manager, **Sivakumar Sundararajan**, has left Ektron to take up a senior role as Technical Pre-sales Manager with Squiz, focusing on the positioning of business aligned solutions.

Tony Holland has been appointed the Sales & Marketing Director of Australian Enterprise Content Management (ECM) solutions software vendor **Knowledgeone Corporation Pty Ltd (K1Corp)**.

Tony has over 10 years experience in the document management and business process outsourcing industry. He returns to K1Corp following 7 years with Fuji Xerox Australia, most recently as NSW Manager of the Global Services division where he was accountable for more than \$300m in outsourcing contracts. Previous roles with Fuji Xerox involved Enterprise Software Sales and Business Process Outsourcing (BPO) Business Development.

Prior to Fuji Xerox Tony spent 4 years with K1Corp (formally GMB) in both a sales and sales management capacity.

Leading Australian ICT project management specialist, **Protegic**, has appointed **David Thompson** as its new Chief Executive Officer. Mr Thompson joined Protegic earlier this year as general manager sales and marketing. Prior to this he was vice president Asia Pacific for software vendor AXS-One, part of Unify Corp.

McAfee has announced the promotion of **Michael Sentonas** to the position of vice president and chief technology officer, Asia Pacific for McAfee. In his new role, based in Sydney, Sentonas joins leaders from the Americas and EMEA within the McAfee Office of the CTO. He will work with them to advance McAfee relationships with key customers and partners in order to support each region's unique business and regulatory requirements.

Sentonas joined McAfee in 1999 and has over 15 years experience in the IT industry, focusing on Internet security.

Gavin Larkings has been named president of **CSC's** Australian operations, succeeding Nick Wilkinson whose assignment in Australia is ending.

Larkings' career in information technology (IT) spans over 30 years and includes management roles within the Commonwealth Bank of Australia and EDS. His experience in IT has been broad and diverse, ranging across line and executive management roles in data centres, technical systems support, applications development and account management.

EVENT DIARY

Desktop virtualisation 2010

April 19-23, 2010

Join Quest Software and independent industry expert Brian Madden to gain insight into the current state of the market for virtualisation, what is real and what's not and what organisations can do now to prepare for the next desktop revolution. Boat House by the Lake, Canberra April 19, Hotel Windsor, Melbourne April 20, Establishment, Sydney April 21, Marriott Hotel, Brisbane April 22, and Duxton Hotel, Wellington, April 23.

www.quest.com/ANZVirtualisationSeminar

The National Records & Information Officers Forum

28-29 April, 2010, Melbourne

This forum will provide professional development opportunities in the form of case studies, discussion and networking platforms to debate and explore issues currently affecting record-keeping practices

<http://liquidlearning.com.au/>

MDM Summit Asia Pacific

May 11-12, Sydney

Enterprise IQ and The MDM Institute present the 5th Annual MDM SUMMIT Asia Pacific - the region's premier event dedicated specifically to MDM, DQ, CDI, PIM and data governance.

www.mdmsummit.com.au

ReadSoft Roadshow Seminars

Readsoft has scheduled a series of seminars running from April to September in Sydney, Melbourne, Brisbane and New Zealand, covering the topics of Accounts Payable Automation for SAP, AP Automation for other ERP and Enterprise Capture.

For dates and venues, and to preregister visit www.readsoft.com.au/email/roadshow_register.htm

Australia SharePoint Conference 2010

16-17 June 2010

Hilton, Sydney, New South Wales

Australia's first Community SharePoint Conference - THE event to learn about SharePoint 2007 and 2010 with expert local and international speakers presenting on topics to help you succeed with your SharePoint Implementations. High Business focus with a range of case studies and practical sessions as well as a Technical Track. Full agenda due out by 10 March.

<http://www.sharepointconference.com.au/>

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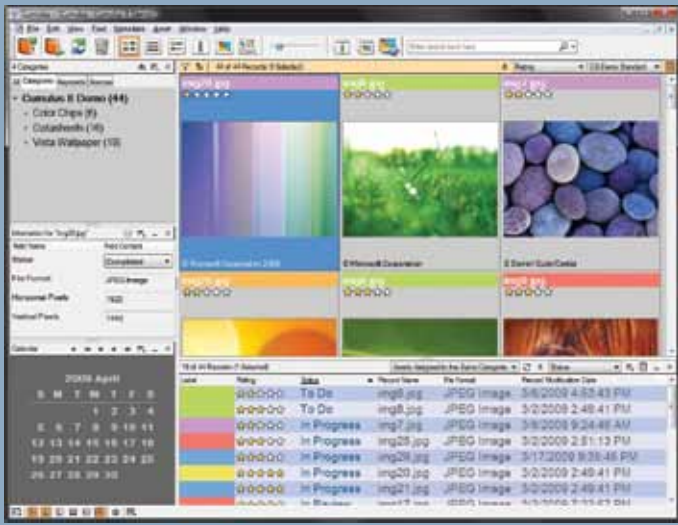
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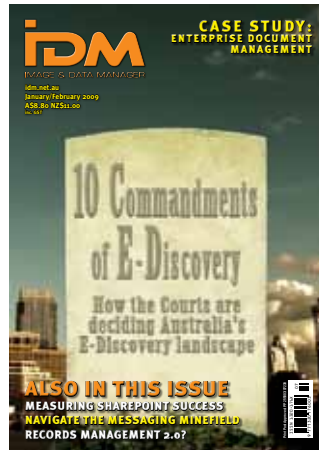
The new look Cumulus 8 has a freshly designed interface, an inbuilt image editor, enhanced metadata capabilities and better online help and commenting. Performance has been dramatically improved across the whole Cumulus 8 product line and there are new and affordable network-based add-ons such as statistical reporting, email cataloging and more.

All new and renewing IDM subscribers receive the demo CD and a DataBasics Voucher to purchase the Single User for HALF PRICE! Normal recommended retail pricing for Canto Cumulus 8 Single User edition is Aus\$540 (ex.GST) but you can purchase for only \$A270 when you subscribe.



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