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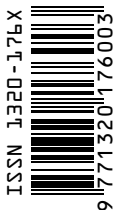
# Banking on SharePoint

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# PROJECT TARDIS

**HOMESTART SA TRAVELS TO  
A BRAVE NEW EDRMS FUTURE**



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## AccessData/CT Summation merge

AccessData Corporation and CT Summation are to join forces and merge into a single company, AccessData Group, LLC. The new company will deliver an end-to-end eDiscovery software solution capable of addressing all phases of the litigation workflow.

AccessData eDiscovery software is designed to address litigation hold, automated collection, processing, and analysis prior to legal review. CT Summation provides litigation workflow and eDiscovery solutions to law firms and corporate legal departments, iBlaze, Enterprise, WebBlaze, CaseVault, CaseVantage and Discovery Cracker products.

CT Summation is part of Wolters Kluwer Corporate Legal Services, which operates under the CT brand. Wolters Kluwer will remain as a strategic investor in the new AccessData Group, LLC, with a minority stake in the company.

By combining these complementary workflow solutions, AccessData aims to deliver an end-to-end eDiscovery software solution for corporations and law firms that supports the litigation process from litigation hold through trial.

## Weather turns for \$1M EDRMS

The Bureau of Meteorology is calling for tenders for the implementation of an Electronic Document and Records Management System (EDRMS) that is expected to cost from \$1-1.5 million.

Australia's national weather, climate and water agency wants an EDRMS platform to support compliance with Commonwealth records management obligations, especially in relation to records in an electronic format (documents, email, digitised hardcopy, etc.).

It is also aiming to achieve efficiencies through more effective whole-of-organisation record management, search and retrieval. Increased efficiency through the development of business process automation solutions is a major driver for the bureau.

## Risk-free cloud is oceans away

Almost half of Oceania IT professionals say that the risks of cloud computing outweigh the benefits, according to the first ISACA Oceania IT Risk/Reward Barometer survey.

ISACA's Oceania IT Risk/Reward Barometer surveyed 218 Australia and New Zealand-based IT professionals who are members of the global, non-profit professional association ISACA.

It found that fewer than 10 percent of respondents' organisations plan to use cloud computing for mission-critical IT services and almost one third (30 percent) do not plan to use it for any IT services.

Consistent with this attitude is the appetite for overall IT-related risk in 2010. In the face of continued global economic uncertainty, and despite the potential to drive greater rewards, almost 60 percent of respondents believe projects should offer the same or lower level of risk as 2009. However, this is significantly lower than the North American results, where 78 percent of those surveyed were comfortable with the same or lower level of risk than 2009, highlighting the greater confidence levels currently experienced in Australia and New Zealand.

Not surprisingly, though, almost one third (32 percent) identified budget limits as being their enterprise's greatest hurdle when addressing IT-related business risk.

"Moving to cloud computing represents a significant shift in how companies utilise resources, so it is not surprising that IT and business professionals feel there could be a number of potential risks in entrusting information to the cloud," says Ria Lucas, CISA, CGEIT, international vice president of ISACA and investment manager at Telstra.

The online survey also gauged organisations' attitudes and behaviours related to IT risk management. According to IT professionals, only 17 percent of organisations in Australia and New Zealand are very effective at integrating IT risk management with their overall business risk management.

## EzeScan backs WCC Brisbane

Outback Imaging's latest EzeScan scanning automation solutions are being showcased at the World Computer Congress Brisbane, a biannual event being held in Australia for the first time from September 20-23, 2010.

EzeScan will be sponsoring the event, which will host approximately one thousand delegates from more than 60 countries at the Brisbane Convention and Exhibition Centre. WCC2010 will have a major congress and exhibition program including government and industry streams.

EzeScan will be showcasing its solutions including simplified back scanning, automation of invoice processing, forms data extraction, mailroom/correspondence automation and integrated EDRMS imaging.

Mike Kirkby, Outback Imaging Managing Director, said "Clients are moving more towards decentralised scanning, or workgroup based scanning. People are deploying scanning resources at the coalface, rather than in dedicated scanning rooms. This is driving innovation in this segment, as people are looking for cost effective solutions.

"More and more clients are looking for highly integrated solutions, out of the box. Solutions that can scan or import images, index metadata, then seamlessly push images with metadata into their existing EDRM, CRM and financial systems"

Kirkby notes the amount of colour scanning being done is increasing, as the number of colour hardcopy documents being produced continues to increase. This has been driven by the availability of low cost colour printing devices including colour laser printers and colour photocopiers.

"Businesses are now looking to harness the benefits of digitising their hardcopy documents to enable them to more effectively manage the lifecycle of those documents, and to deliver substantial productivity benefits to the business, and a win to the bottom line."

EzeScan's recent enhancements have included the introduction of a connector for DocuWare allowing native integration into this EDRMS, as well as ISIS scanner driver module, meaning EzeScan is able to support the two major scanner interfaces.

## Objective brings order to WA law

The Legal Practice Board in Western Australia has selected Objective's content, collaboration and process management solution to enhance their services to legal practitioners.

The Legal Practice Board has statutory responsibility for the admission, supervision and discipline (through the Legal Profession Complaints Committee) of all legal practitioners in Western Australia. It also regulates the issue of annual practice certificates and administers the Articles Training Program and the law libraries at the Supreme and Central Law Courts.

Graeme Geldart, Executive Director, Legal Practice Board of Western Australia said: "Objective will provide us with a robust secure solution that can be used to search for information enterprise-wide, at the same time allowing us to control access to confidential information."

The Legal Practice Board operates over four geographical locations and will use Objective to manage the abundance of information and records that they create, maintain and store as a regular part of their business processes.

Currently, the organisation has 2,000 physical files at the Legal Profession Complaints Committee, 600 at the Article Training Program, 17,000 at the Office of the Board and 10,000 practitioner files. Using Objective, all applications will be saved into a student's electronic file, which will be linked to the course folder they are enrolled in.

Rather than each department waiting for hard copies or emails with the legal practitioners training results, staff will be able to easily access the applicant's complete and up-to-date information immediately via the student folder in Objective.

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# Flying high in the SharePoint Cloud

**A**delaide-based financial advisers Business and Risk Solutions (BR) is growing in leaps and bounds through the cloud, thanks to a virtual desktop powered by Microsoft SharePoint and the help of MacroView and Citrix technologies.

BRS consultants located around Australia can now connect via a web browser to share, manage and collaborate on emails, documents and project-related data – via the familiar environment of Microsoft Outlook delivered in a cloud environment.

BRS uses a sub-contracting model for its consultants, that are engaged job-by-job on an hourly basis to perform work for the BRS quality client list. Up to 20 additional consultants per job are supported by a core group of eight staff that run the day-to-day business including marketing, finance, business development, and administration.

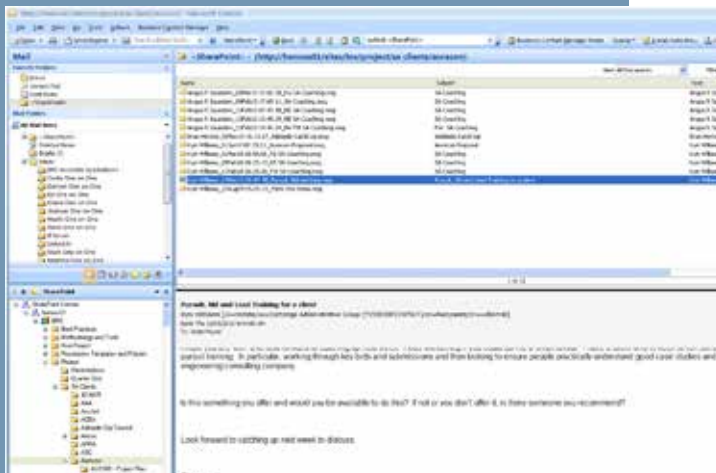
Kym Williams, BRS Managing Director, said: "To make this business model feasible you need a fully remote working model, with easy-to-use document management and systems that can scale up fast. By using cloud computing we allow our consultants to log on to any computer in the world and work directly on their virtual desktop.

"The other critical need is to minimise training time for new consultants, which we achieved by integrating Outlook with SharePoint using MacroView DMF. This enables very simple and easy to use document control – all a new consultant needs to understand is how to use Outlook."

BRS now stores all its emails, documents and files in Microsoft SharePoint. MacroView DMF adds customisations to Microsoft Outlook, so that each user can view and navigate the structure of the SharePoint document store and easily save or retrieve all types of documents.

DMF displays a tree-view of the structure of the SharePoint document store. DMF also provides an interface to the SharePoint Search engine, which facilitates content and/or metadata-based searching for documents stored in SharePoint.

Project Coordinator Martyne Hamilton said, "Our



MacroView DMF adds a new panel to Outlook, which displays an intuitive tree-view of the SharePoint document store

consultants love the way MacroView DMF lets them drag and drop emails and attachments to save them to any area in our SharePoint store for which they have access permission. Thanks to DMF, they can browse and search for all the documents that are related to a project while they work in their Outlook desktop.

"SharePoint lets us maintain good control over project documents, so that everyone working on a project can be confident that they are seeing up-to-date versions, and also be aware who else is working on a particular document."

The BRS system was implemented in close co-ordination with another Adelaide based firm - Cloud Networks.

Damon Joseph, CEO of Cloud Networks, said: "By using Citrix we can allow each BRS consultant to access their Outlook desktop from anywhere in the world – simply via a web browser.

"MacroView DMF extends Outlook so that it provides an intuitive, user-friendly means of accessing the document management and collaboration capabilities of Microsoft SharePoint".

## Wal-mart push sparks RFID fears

As giant American retailer Wal-mart moves RFID from the warehouse into the display stands, some are concerned about the potential privacy risks.

With over 250 million RFID (Radio Frequency Identification) tags being put into Wal-Mart's menswear range across Wal-Marts 3,750 US stores, the RFID Security Alliance has responded to inquiries from the public questioning the security and privacy of their personal information and their risks when purchasing such merchandise.

"We at the RFID SA take an active role to educate the industry and lay person of the advantages and risks associated with RFID based solutions and are deeply committed to insuring that everyone's information remains private and secure in a well implemented RFID solution," said RFID SA Chairman Michael McCartney.

He continued "In reviewing the details of this use-case we find

the threat to privacy to be very low and in fact not dissimilar to that of bar codes that it is designed to replace. The removable tags are attached to the garment in the same manner as the conventional bar code tags, with a plastic or cotton loop or tie.

"Additionally, once removed, these tags can also be permanently disabled with a pair of scissors rendering them irrevocably unreadable so even once the tag is disposed of at the home, the tag can no longer be accessed."

RFID SA has moved to reassure the public that information in the tags is basic inventory information used to keep track of in stock jeans and apparel items.

"The RFID SA seriously doubt how useful this non-personal information might be to anyone other than Wal-Mart. RFID can provide huge cost savings to the industry that will also be passed onto the consumer and will also allow faster and more efficient checkout and returns."

## ISYS Search wins UNAIDS deal

ISYS Search Software has won a competitive bid to supply an enterprise-wide search solution to UNAIDS, the Joint United Nations Programme on HIV/AIDS.

Working in conjunction with its strategic partner Raytion, ISYS will supply UNAIDS with a universal information access solution that encompasses a broad range of knowledge collections and access points.

UNAIDS will leverage ISYS's integrated solution to enable information access across its public websites, intranet repositories, content management systems and individual desktops.

UNAIDS new solution will also be accessible by all employees across its worldwide offices, including remote workers, who will tap into ISYS's mobile enterprise search capabilities.

Established in 1988, ISYS Search Software is a global supplier of enterprise search solutions for information access, management and re-use.

## A record by any other name?

A storm has erupted over a proposal to give the Records Management Association of Australasia (RMAA) a new identity, with CEO Kate Walker announcing a plan to become instead the Information Management Professionals Australasia (IMPA).

Revealing the proposal had been agreed to at the latest RMAA board meeting, Walker explained, "Records Management professionals and the Association have branched out into various types of Information Management areas, it has been harder and harder to define succinctly what we do with just the term Records Management.

"While the words "records management" remains important to the identity of the profession, it is no longer the best descriptor for what our profession encompasses. It conjures images of traditional "filing and mailroom functionality that can limit or even be detrimental to the overall image of the profession.

"Many professionals have moved beyond traditional records management settings and are prevalent in nearly every professional

field, affecting compliance, legal, economics, management, health care, logistics and education in addition to our traditional territory of records management. The word "Information Management" better describes our growth, evolution, relevance and skills."

Around 1000 professional members will be eligible to vote for or against the new nomenclature at the RMAA's annual general meeting, to be held on September 7, 2010 at Inforum, the organisation's annual conference and exhibition on the Gold Coast. Attendance at the annual conference is typically around the 300 mark, with absent members able to vote at the AGM by proxy.

Discussion is likely to be heated as the RMAA's listserv discussion forum has already seen strong opposition to the proposal from prominent records management professionals.

Strident opposition has come from respected consultant and author Barbara Reed, of Recordkeeping Innovation, who was recently commissioned to write for the Government 2.0 Taskforce on preservation of records in the web 2.0 world.

"I think that records have a huge role to play in the larger and broader information management agenda. And they should. However, this doesn't mean that records management=information management. Records management is a part of information management – an important part, and the part that we have a particular professional responsibility for - but it is not the whole," wrote Reed.

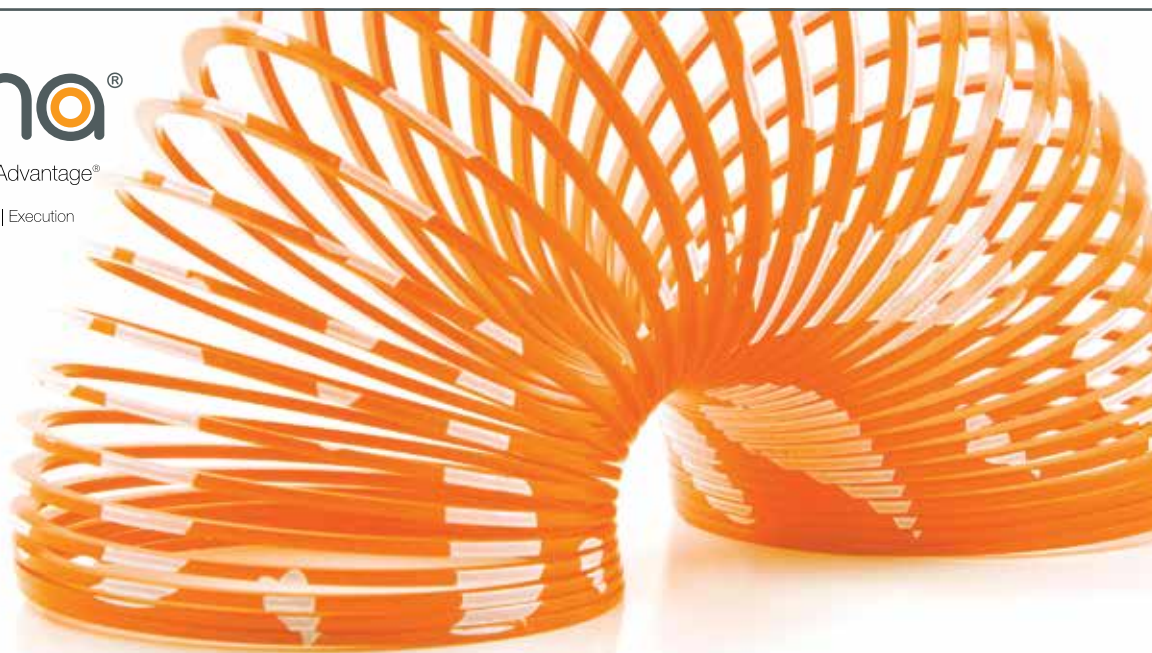
"Records are not just the same as other information resources. They need to be regarded as a specific subset of information resources. The distinctions are clear.

"Records arise out of doing business action (defined very broadly). They need to be persistently linked with that business action and the actors involved with the action. In addition they need to be managed in ways that preserve and enable us to make authoritative statements about their authenticity, reliability, integrity and useability. While some other information resources share some of these requirements, the whole of the notion of evidence of action (i.e. records) depends on it. It's not a nice add on. And it's that set of understandings that we have to offer to the broader information management agenda."

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# Konica Minolta dots the I's downunder

Konica Minolta is teaming up with Australia's I2 Software to offer a range of document scanning and indexing applications, and the it4Group to roll out the InVu workflow & document management solution.

"i2 Software offers a range of powerful yet easy to configure and use applications that fit perfectly within our solution portfolio," said Kylie Timmins, National Software Product Manager, Client Solutions Group from Konica Minolta Australia.

Konica Minolta will be offering I2 Software solutions for scanning and high volume processing of paper, with output to a range of databases and document management systems such as SharePoint, DocNet and InVu. Kofax solutions are already being offered for medium to enterprise-size organisations, whereas i2 Software's products will be targeted at small to medium-sized business and offered by Konica Minolta in addition to eCopy.

Timmins said the I2 Software solutions offered a flexible price-point and "they are a fantastic company to work with. They are very responsive and able to meet our requests to configure their products to our client's needs."

"We have already been offering the Unity Desktop from Nuance, which includes OmniPage, but I2 has a different feature set; you can zoom in on zones on the page, use the magic wand and OCR from images."

"I2 Conversion Server also offers the ability to convert files to text-searchable PDF and they are writing a connector into InVu."

Konica Minolta is now offering InVu content automation integrated with its bizhub multi-functional devices. InVu is a .NET document management suite developed in the UK, sold and supported in Australia by the it4Group.

"By adding InVu workflow & document management software to our product mix, Konica Minolta can offer all the powerful capabilities of this market-leading document management platform to our customers," said Timmins.

"More than ever, organisations are facing pressures to reduce costs and are faced with the challenge of managing an increasing number of documents and printed paper. InVu addresses these challenges by helping customers improve efficiencies, lower costs and makes you more responsive to enquiries – without even leaving your desk."

Timmins said the decision to select InVu was based on the comprehensive feature set incorporated in the core platform, which is able to be extended to develop automated workflows.

"It integrates with the Office suite and email and is able to pull in information from legacy applications," said Timmins.

"We have also provided it4 with our API, so InVu can be integrated into the panels on our bizhub MFPs, and its bidirectional so users can use it to pull documents out of a repository as well pushing them though."

InVu for SharePoint has recently been added to the InVu product set and is targeted at businesses utilising SharePoint. It builds on the existing InVu Document Management product and integrates with both Microsoft SharePoint 2007 and the new SharePoint 2010 editions.

InVu has also joined forces with ABBYY to develop a new function, called InVu Capture, based on FlexiCapture 9.0, ABBYY's newest data and document capture solution.

Timmins said "it4 are looking at this for ICR (intelligent character recognition) where handwritten forms need to be scanned and input to InVu. Whether its Abby or Kofax for ICR, I don't care as long as its meeting customer needs."

"It also offers easy Integration into third-party applications so invoice processing workflows can be created to write data directly into your existing financials. There is a high security focus, with audit trails on all documents, linked to active directory, and PCI Compliance with encryption of credit card information, which is so important nowadays."

## Web 2.0 leads to ediscovery wake-up call: Deloitte

Social media is causing headaches for organisations concerned about the ediscovery implications, according to a new survey commissioned by Deloitte's US-based Forensic Center. During the next three years, 49 percent of respondents expect their companies' information technology department to increase e-discovery efforts; 44 percent expect e-discovery challenges to increase; and 39 percent expect to devote more resources to e-discovery.

However, of respondents with an opinion, 61 percent expect their companies to be only somewhat effective or not effective at all in dealing with e-discovery challenges three years from now. One-quarter of respondents indicated their companies are unprepared to handle e-discovery requests pertaining to business-related use of social media, and an additional 36 percent indicated their companies are only somewhat prepared.

Beyond social media platforms, only 9 percent of companies are well prepared to capture electronically stored information on third-party platforms, such as information stored in the cloud or used in software-as-a-service (SAAS) applications.

"The demands of e-discovery are clearly growing. Facebook and Twitter have not only become more prevalent in employees' personal lives, but have also become more accepted in the workplace, as companies

are beginning to leverage social media platforms throughout the corporate environment," said Deloitte analyst Jeff Seymour.

"With electronically stored information rapidly rising in volume, avoiding e-discovery missteps requires cooperation from two corporate functions that typically have little in common, and often don't speak the same language: legal and IT."

Communication challenges between legal and IT teams seem to be admitted by both sides. Only 23 percent of those who work in compliance, risk assessment or the legal department, and who have an opinion, say their IT department understands legal requirements for e-discovery very well. Coincidentally, only 23 percent of IT respondents with an opinion said their legal department understands very well the limits of what IT can do to support e-discovery.

"The predominant lack of effective communication between legal and IT functions can have serious repercussions including sanctions, lost cases and severe fines," said Toby Bishop, director of the Deloitte Forensic Center. "This communication challenge should be overcome if the risk of e-discovery missteps is to be mitigated. Cross-functional e-discovery training can help IT personnel understand what the legal team needs from them, and to help the legal team understand what IT can and cannot accomplish with the skills and resources they have."

[www.deloitte.com/forensiccenter](http://www.deloitte.com/forensiccenter)



# DocAve helps put NSW on the map

The NSW Land Property Management Authority (LPMA) is using AvePoint's DocAve Storage Optimisation Suite to help deploy SharePoint to more than 1900 employees distributed among 90 locations throughout New South Wales.

LPMA has the immense responsibility of acting as the guardian of all land information in New South Wales (NSW), and has quickly become a world leader in this regard.

LPMA recognised the need to provide a single platform for all the geographically distributed employees across the state to access files, collaborate, and share information. Consequently, LPMA purchased Microsoft Office SharePoint Server (MOSS) 2007. During the planning phase for the MOSS production farm and requisite information architecture, the matter of migrating all of its digital assets into SharePoint's SQL Server-based content database quickly became an issue.

LPMA had approximately 8 terabytes (TB) of data residing in disparate file shares, and estimated that in the next two to three years it would add upwards of 3 TB to its existing content. In order to satisfy Microsoft best practices – no more than 100 gigabytes of content in each SQL content database – LPMA would then need to have at least 80 SQL content databases. Furthermore, migrating all this information into its MOSS environment could leave the LPMA susceptible to business disruption and data loss if any of the documents, including vital GIS (geographic information system) data did not successfully transfer.

In early 2010, LPMA discovered AvePoint's DocAve Connector for SharePoint, which enables the "attachment" of network file-share content to SharePoint, so end-users can leverage the platform to manage and present all of their file system data – without having to migrate it into SharePoint's content databases.

With DocAve File Share Connector deployed, LPMA swiftly attached its 8 terabytes of content to its MOSS 2007 deployment. The organisation still plans to migrate some content and data into SharePoint – including content for My Sites and Workspaces – but it is now only considering two or three content databases as opposed to the 80-plus for which it originally planned.

"We were able to shave between 9 to 12 months off of our original timeline for our SharePoint rollout", said Dr. Steven Woodhouse, Manager of Technical Services at LPMA. "We will have a fully operational SharePoint deployment by the end of this calendar year. Without DocAve, that would have been extended to the end of 2011."

## Seamless SharePoint Storage and Content Lifecycle Management

It is critical companies embracing SharePoint properly plan for efficiently managing storage resources and content lifecycles. AvePoint's Storage Optimisation Suite completes the storage and content lifecycle management picture, so organisations can take full advantage of SharePoint for success.

As more Australian organisations adopt Microsoft SharePoint, administrators are searching for strategies to optimise the platform's storage capacity.

More organisations throughout Australia are quickly adopting Microsoft SharePoint Products and Technologies as the platform upon which they are connecting their people, processes, and information. An ideal platform for the presentation and management of enterprise-wide content and data, businesses look to SharePoint so their knowledge workers can better collaborate and manage mission-critical business initiatives.

Natively, SharePoint uses a unified storage infrastructure utilizing the SQL Server database. Though it is an efficient database technology, using SQL as SharePoint's backend poses unique

Massive quantities of data are generated by the core business of NSW's Land Property Management Authority (LPMA). Geospatial data gathered from ground surveys, as well as aerial photographs and satellite imagery, is used to produce a wide range of digital and hard copy products and services.



challenges for organisations looking to shepherd terabytes of legacy data. IT administrators must address three separate challenges when planning their strategies for best utilising its SharePoint storage – unstructured data, legacy content, and inactive content.

Unstructured data includes non-relational data streams – also known as Binary Large Objects (BLOBs) – such as Word documents, PDF files, video files, and other unstructured data. Considering more than 95 percent of the data a typical organisation uploads into SharePoint are BLOBs – and SharePoint has the capacity to hold documents of up to several megabytes in size – the platform's SQL input/output performance can suffer when overburdened. Furthermore, organisations have volumes of legacy content stored

**WE WERE ABLE TO SHAVE BETWEEN 9 TO 12 MONTHS OFF OF OUR ORIGINAL TIMELINE FOR OUR SHAREPOINT ROLLOUT", - DR. STEVEN WOODHOUSE, MANAGER OF TECHNICAL SERVICES AT LPMA.**

on myriad file shares, legacy databases, and other storage devices. While most would like to unify management and presentation of this legacy data via their SharePoint deployments, many companies do not necessarily want to migrate this data into their SharePoint environments.

Finally, as SharePoint is utilised by end-users, the "dormant" data – content no longer actively used by the organisation – grows exponentially relative to the active content. Natively, all this data will be sitting in SQL servers, which can slow down SharePoint environments and potentially damage end-user adoption.

As such, organisations must make an important decision: Shall they continue to purchase additional SQL Servers to meet demand, take the time to write custom solutions utilising Microsoft's External BLOB Store Provider or Remote BLOB Storage API for storage optimisation, or look to a third-party vendor to optimise storage and craft automated content lifecycle strategies?

Many organisations have turned to AvePoint's DocAve Storage Optimisation Suite – DocAve Extender, DocAve Connector, and DocAve Archiver – to optimise content databases, present and manage file shares via SharePoint without the need for import, and automate intelligent content lifecycle management, respectively.

**For more info on AvePoint's DocAve Suite, visit [www.AvePoint.com.au](http://www.AvePoint.com.au) or contact AvePoint Australia: Tel: (03) 9620 0200 Email: [Sales\\_AU@avepoint.com](mailto:Sales_AU@avepoint.com)**

## SharePoint surge continues but strategies are lacking: AIIM

A recent survey by AIIM (Association for Information and Image Management) has found that less than 50% of SharePoint implementations were subject to a formal business case, and only half of those required a financial justification.

As a result, most did not have a management plan as to which of SharePoint's many features were to be used, and where. Meanwhile, SharePoint deployment is proceeding rapidly, with 22% of respondents reporting it to be in use by 100% of office staff. This adoption rate is set to double by this time next year.

Half of the smaller businesses implementing SharePoint are addressing the issues of information management for the first time. Even a quarter of the largest organisations have no previous experience with Enterprise Content Management (ECM) or Document Management (DM) systems.

As a result, only 22% provide any guidance to staff on the use of content types and classification. In addition, just 15% have retention policies and legal discovery procedures - risking content chaos within SharePoint as well as outside of it, according to the AIIM report.

For organisations that do have existing ECM and DM

systems, nearly a third have yet to define how SharePoint fits with these systems. The most popular option is to use SharePoint for collaboration and intranet publishing while relying on existing systems for document and records management. In many cases, SharePoint will be used as a portal or front-end to those existing systems.

Only 8% of survey respondents are planning to phase out their existing ECM suite in favour of SharePoint, while 7% plan to invest in a new ECM or records management suite to go with their SharePoint system.

According to Doug Miles, Director of Market Intelligence for AIIM, "We see that organisations are pushing forward with enterprise-wide rollouts of SharePoint for collaboration and intranet, and are using this universal access to provide single-sign on portals into existing document and records repositories, thereby opening them up for better knowledge sharing."

The AIIM report also shows that among those who are using SharePoint for traditional ECM applications, there is strong growth in the use of add-on packages to strengthen and supplement standard functionality, particularly in BPM, security, records management, search, Enterprise 2.0 and archive.

## NFSA acts to save video archives

The National Film and Sound Archive (NFSA) has begun a major project to archive more than 40,000 hours of video stored in superannuated analogue formats, with the purchase of two SAMMA Solo systems from media migration specialist DAMsmart.



Much of the NFSA's video archive is stored on ageing formats such as U-Matic or analogue betacam which are deteriorating and in need of digital preservation. Archive material from the earlier years of TV in Australia is stored on 1" and 2" analogue tape formats that are now outdated.

Greg Moss, Manager of the Digital Media Preservation Project for the NFSA, says 'We're digitising these works to preserve their usable lives, not just to keep a record of them, so preserving their original quality is paramount. SAMMA Solo gives us fine control over the quality of the content before and during digitisation.'

With a wide variety of tape quality and formats in the collection, including 2" video, NFSA's own expertise is vital in the process. Fully automated digitisation isn't an option, but SAMMA Solo analyses every frame of video tape and flags quality issues, so operators can fine-tune the process as they go.

The digital conversion creates multiple copies at full and reduced resolution, with copies of the programs simultaneously stored on network storage and a nearline LTO-4 tape-based digital archive.

A major benefit of the new system is SAMMA's use of ISO standard JPEG 2000 encoding, which yields digital files in open formats. For the NFSA, this enables long term access and adjustment without the risk of proprietary restrictions and expense. Some of the world's largest audiovisual archives, including the US Library of Congress, use SAMMA to digitise their audiovisual collections. A significant challenge for archivists is to preserve original unaltered content in the smallest, most manageable package. This is effectively addressed through JPEG 2000's 'mathematically lossless' compression which reduces video files to one third of their original size, dramatically reducing transmission

speeds and storage space.

'We've been strong advocates of JPEG 2000 for some time,' says Joe Kelly, DAMsmart's Media Migration Manager. 'With the premier archive in Australia choosing JPEG 2000, we're confident that others will soon follow.'

The meticulous migration of NFSA's video archives is likely to take many years, but digitisation will enhance the storage, monitoring and accessibility of this irreplaceable Australian audiovisual collection.

## Super returns for Global 360

Success at QSuper, one of the largest superannuation funds in Australia, has contributed to a big jump in revenue for Global 360's Business Process Management Systems (BPMS) business. QSuper is one of the largest superannuation funds in Australia, with over 530,000 members and over \$US23B in funds under management. The win at QSuper contributed to a 106 percent year-over-year quarterly increase in global license revenue from the company's Business Process Management Systems (BPMS) business.

QSuper selected Global 360 to help the company transform its workflow practices with the Global 360 BPM platform chosen as the key enabling system.

The company has also reported a 22 percent increase in total BPMS business year-over-year with 49 percent from net new BPM license revenue, along with a 78 percent increase in its Professional Services Organization (PSO).

Global 360 President and CEO David Mitchell, said, "Our corporate strategy and positioning is working, as evidenced by our ability to target and win the highest percentage of new customer business we have achieved in the last two years. Our leadership in BPM and case management, supported by our persona-based approach, is fueling our growth - and confirming the need in the market to address the needs of knowledge workers."

In the fourth quarter, Global 360 introduced analystView 3.0, a new business process simulation and analysis tool that provides business analysts and Microsoft Visio users integrated process modeling and analytics functionality within Visio Premium 2010.

Global 360 also introduced Process360 for SharePoint, providing out-of-the-box intuitive and configurable user applications using SharePoint web parts to maximize productivity while reducing development time and costs.





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# Objective



## New Web day dawns for Adobe

Adobe has moved from content creation to content management with the US\$240 million acquisition of Swiss company Day Software Holding.

The move delivers a stable of products to Adobe that provide Web Content Management (WCM), Digital Asset Management and Social Collaboration offerings.

"Adobe's acquisition of Day represents a key milestone in our efforts toward delivering best-in-class customer experience management solutions to enterprises and governments worldwide," said Rob Tarkoff, senior vice president and general manager, Digital Enterprise Solutions, Adobe.

"With the addition of Day to our enterprise portfolio, we will be able to enhance the value of our offering and deliver on our vision of the web as the hub of customer interaction."

Day's Content Repository Extreme (CRX) is a Java Content Repository (JCR) that provides virtualisation services to consolidate legacy repositories.

## Vic Life Sciences adds SGI cluster

The Victorian Life Sciences Computation Initiative (VLSCI) has commissioned a SGI Altix XE1300 cluster for high performance computing (HPC) in its \$A100 million (AUD) Parkville Precinct facility.

The SGI cluster will enable researchers to explore large databases, create complex simulation models and to visualise and analyse data to accelerate important cancer, cardiovascular and neurological disease and diabetes research.

"It is exciting for VLSCI and the University of Melbourne to see that 40 high-profile life sciences research projects are already progressing on our new SGI cluster," said David Bannon, peak computing facility manager at VLSCI.

"The successful projects cover a broad spectrum of life science research topics such as nano-molecular motors, G protein-coupled receptors or arteriosclerosis disease, amongst many others."

The cluster contains 136 nodes, enabling data intensive applications to utilise the highest possible I/O performance, and 11.5 Teraflops of performance and 160TB of storage to support the initiative's critical research.

## Fastman engineers new future with Cadac Organice

Fastman Consulting and Solutions has been appointed as a new local partner for Cadac Organice, the SharePoint-based engineering document management solution.

Fastman will sell and implement the Cadac Organice Product Suite in Australia and New Zealand.

Fastman Consulting and Solutions is a specialist Enterprise Content Management solution provider that has implemented ECM systems for clients companies in engineering, infrastructure management, public utilities, health and government.

Alister Grigg, Managing Director Fastman Consulting and Solutions, said "Cadac Organice is a natural fit with our existing capabilities and client base, allowing our Engineering and Infrastructure clients to implement solutions based on industry leading products and to take advantage of the extensive experience our team has in designing, implementing and supporting complex content management systems across our region. We are excited and very pleased to be able to add Cadac Organice to our offerings".

John Kerferd, Regional Sales Manager Cadac Organice APAC: "Fastman Consulting and Services provides the region with the capability that we need as we grow our user base. Fastman brings a wealth of experience to support our customers in NSW, VIC and SA. They are a welcome addition to the growing partner ecosystem for Cadac Organice in the APAC region."

## Autonomy acquires CA software

Autonomy is to acquire CA Technologies Information Governance business, including CA Records Manager and CA Message Manage. CA Records Manager does not have a major footprint in Australasia, although in 2009 the New Zealand Treasury became the first local client.

The NZ Treasury installed and configured CA Records Manager itself, integrating it with its iManage document management system and migrating data about both electronic and physical records from its previous records management system.

Autonomy has announced it intends to integrate the two products into the its IDOL information processing platform. It claims this will significantly reduce the levels of manual effort from that previously required and extend connectivity for life cycle management across more than 400 content sources and 1,000 file types.

Customers will also have the option to leverage both offerings hosted in Autonomy's secure private cloud, which currently hosts over 14 petabytes of data. Autonomy is continuing the support and enhancement of both CA Records Manager and CA Message Manager.

Forrester analyst Brian Hill commented that "Given overlaps in the vendors' offerings, I see this as a somewhat surprising move and suggest that customers keep a close watch on how this plays out."

"From its prior acquisitions of Interwoven in 2009 and Meridio in 2007, Autonomy has two existing records management applications. Largely leveraging its 2007 purchase of ZANTAZ, Autonomy also currently markets several message archiving solutions including Digital Safe (cloud-based archiving solution), Enterprise Archive Solution (on-premise archiving software), Arcpliance (on-premise archiving appliance), and more. After it completes the acquisition of CA Technologies' Information Governance business, Autonomy will have three distinct offerings for records management and over four for message archiving," noted Hill.

## Basware delivers hosted e-invoicing solution

Basware has announced the addition of supplier functionality to its Basware Connectivity services, offering accounts receivable (AR) departments in Australia and New Zealand a hosted solution to switching to fully electronic invoices.

Basware Connectivity for Suppliers enables Accounts Receivable (AR) departments to deliver all sales invoices to their customers electronically irrespective of the invoice format required by the customer organisation. The service processes the invoice in an electronic format and routes them to the customers' invoicing processing systems, e-mail addresses or a printing service, depending on the recipient's choice.

Once invoices are delivered, they are archived to guarantee integrity, enabling future compliance where there are legal requirements for storing e-invoices. According to independent research company Billentis, organisations can save as much as 57% per invoice in costs by turning their sales invoices electronic.

"An increasing number of Accounts Receivable departments are facing demand from their customers to provide e-invoices. We are already seeing this become a key criterion in vendor selection processes as they seek to improve collaboration across their supply chains," said Karri Lehtonen, vice-president of Basware Australia and New Zealand.

"With these new services, Basware Connectivity allows Accounts Receivable teams to switch to e-invoicing instantaneously, without having to manage paper processes concurrently to cater for customers who are in the early development phases of their e-invoicing strategy. This allows suppliers to gain competitive advantage over their competitors while meeting the billing needs of existing customers."

# Centrelink in document revolution

Three Australian federal government agencies that between them send out almost 150 million physical pieces of mail a year are looking to initiate a digital revolution, with Centrelink calling a tender for a new document output management system.

The Centrelink solution will also support Medicare Australia and the Child Support Program (CSP), which manages the collection of child support payments from separated parents. The new platform will aim to provide departmental officers with a greater control of document creation and modification, which is currently hampered by 20-year old mainframe technology that requires the intervention of programmers at crucial stages. It is expected to take four years to be fully implemented.

The migration to electronic delivery methods such as secure email and SMS has begun, but this still only represents a fraction of the volume of communications delivered through service providers via Australia Post. In 2008-09 Centrelink produced over 109 million letters, Medicare over 11 million and CSP over 13 million.

However in the same year Centrelink delivered more than 1.65 million PDF letters electronically using the Secure Online Mail (SOM) facility via its eServices portal, up from around 900,000 in 2007-08. Centrelink also sent 1.8 million SMS messages compared to 1.2 million in 2007-08.

A move to electronic documents and records management is also flagged in the tender documents. Centrelink has already announced the first phase of a push to digitise paper-based forms across its Australian network of 316 city and regional offices. The installation of Fuji-Xerox ApeosPort multi-function devices (MFDs) in each office over the past two years has allowed for the first wave of digitisation of paper-based forms. The digital files are stored in DB2 and presented to the user through various Centrelink in-house systems and a number of process service business flows.

"This is an interim solution and consideration is being given to using a records management system in the future," according to the tender documents, which explain the present tender does not extend to handling inbound communications but this will occur "in the longer term."

All three agencies provide forms on their respective Web sites, and Medicare Australia utilises the Kodak i1700 series for scanning with OCR recognition.

## eServices restrictions

Centrelink wants to address restrictions to its Secured Online Mail (SOM) system, which cannot be used if it includes a form that needs to be returned, as well as limitations to its archiving of correspondence. When a letter is generated, the archive retains only the original data and the metadata, not the templates and styles.

According to the tender documents, the archiving system only "provides a text-only viewing and retrieval capability. Customer communications can, in theory, be reproduced to look like the original, but it is a manual task and sometimes recreating the letter to look like the original is problematic."

Medicare Australia does not retain a copy of individual communications sent to a customer. The Medicare Australia desktop environment current consists of approximately 5700 desktop PCs and 530 notebooks.

Centrelink uses TRIM for paper-based records management, while Medicare has a range of strategies that include DB2 for business and client data, SQL Server for smaller databases, TRIM for general office and program administration data in the National Office and Tasmania only, with Lotus Notes for email and Documentum for Web Content management.

According to the tender documents, the design work for the



mainframe ISIS platform used by Centrelink, "dates to the late 1980s, though there has been nearly continual evolution and extension of the letters functions since then, including production of other forms of communication, including SMS and eMail; and electronic substitutes for printed correspondence, notably PDF documents accessible via the Web.

"Centrelink's use of older generation publishing technology requires IT experts to craft and change letters in a manner similar to other mainframe applications systems' changes. Centrelink needs an agile authoring system and output management system that is less dependent on Centrelink's formal release processes for applications changes and that is less dependent on IT experts familiar with old-generation technology. The other Human Services Agencies have a similar requirement for an agile document management system."

Centerlink is leading the tender for a new DOM system that will provide Centrelink business teams with the tools to manage rules and content, to preview the communication in the final format and to implement changes in a timely manner. All three agencies use a range of mainframe, midrange and application server platforms, with Windows XP the common glue on the desktop. Centrelink uses EMC Document Sciences' CompuSet typesetting language to produce the mark-up code for the style sets and generate the forms.

"CompuSet skills are highly specialised – knowledge of the tool set takes twelve months or more to acquire a productive understanding. CompuSet knowledge and skills are scarce, which therefore leads to an IT development bottleneck. Also, being legacy technology, training IT staff to become proficient in CompuSet is not an attractive option for both Centrelink and the relevant staff members."

Centrelink and Medicare Australia use WebSphere Portal as their portal platform. Many technologies and tools form part of the IBM Enterprise WebSphere Portal suite, including technologies like search, web content management, virtual portals, and collaboration, monitoring and development tools. These technologies form much of the fundamental capabilities associated with any portal platform.

Letters delivered as PDF documents via email using Centrelink's Secure Online Mail (SOM) are created on the mainframe with information being sent from the ISIS application system to the SOM environment using MQMessaging.

# Superreview puts bite into back office

A major report into Australia's superannuation industry claims annual savings of over \$A1 billion can be achieved through major changes to back office processing to reduce costly manual processing of funds.

The Cooper review was released on 30 June 2010, the result of 14 months analysis of the efficiency and governance of superannuation funds by a team led by Jeremy Cooper, former deputy chairman of the Australian Securities & Investments Commission.

The report notes "Australians have over a trillion dollars in superannuation savings. The compulsory nature of super contributions means that by 2035, Australians are projected to have increased their collective super savings to \$6.1 trillion." This scale brings enormous administrative and other associated costs for superannuation administrators.

It concludes, "The back office dominated by manual transactions ... is in urgent need of an upgrade and annually costs members hundreds of millions of dollars more than it should."

The report has recommended a package of measures that have been dubbed "SuperStream", describing ways to bring the back-office of superannuation into the 21st century.

John Brogden, chief executive of the Investment & Financial Services Association, wrote in *The Australian*, "Despite being a dynamic, innovative, world-leading retirement income system, it relies on millions of cheques and pieces of paper. The Cooper review's SuperStream comprehensively addresses this farcical situation. Its recommendations will sweep away costs and improve services."

SuperStream's main components are the increased use of technology, uniform data standards, use of the tax file number as a key identifier and the straight-through processing of superannuation transactions. This term is used for the end-to-end processing of transactions (both data and monetary) from start to finish, using technology to automate and control all elements of the process and workflow. The elimination of manual handling or intervention optimises the processing speed and eliminates data entry errors.

"Excessive costs caused by manual processing of both money transfers and data in super can be significantly reduced by requiring electronic transmission of linked financial and member data at all levels, using standardised formats. Use of the TFN as the primary identifier is critical to this process."

The Cooper review has not recommended a specific timetable for implementing its recommendations, nor provided an estimate of the upfront costs required by funds to implement SuperStream, deriving from the need to adjust IT systems to meet the new data standards.

Andrew Griffin, Registry manager at State Super Financial Services Australia Ltd, believes these costs will be significantly less for those funds that have already taken steps to introduce solutions

for automated data extraction and digital workflow.

These are still in the minority though, as it is estimated that most retail funds in Australia are still employing manual data entry off the scanned image.

Having already implemented a ReadSoft solution in 2003 for automatically capturing data and digitising transaction request forms received from clients, State Super Financial Services looked to extend the solution to maximise their processing capacity and have front-end visibility of the 15,000 document sets received on a monthly basis.

Their manual inbound mail process involved physically opening mail, date stamping each document, sorting by transaction type and distributing documents to individual desks for further processing. This process involved excessive photocopying as documents passed from one person to the next in the processing cycle as well as the need for physical storage of original documents.

## "DOMINATED BY MANUAL TRANSACTIONS ... [AND] IN URGENT NEED OF AN UPGRADE"

The requirements for an automated solution were driven by the need to have total visibility of all inbound documents for control of client information and to save time at the front end of the document processing cycle. The ReadSoft software totally removed the manual process by providing a solution that classifies, sorts and groups documents automatically and feeds appropriate images to workflow systems for full OCR and data extraction.

"The new process is saving us significant time and effort, as well as providing the quick and easy option of electronic storage and retrieval," says Andrew.

While the Cooper review has proposed a digital revolution for transaction processing, this will not ever completely eradicate the requirement to scan and process paper documents.

"Currently there are paper application forms when people commence with a fund and people will still write you a letter with their cheque attached," said Griffin, "but once people move to accepting funds electronically it's not hard to integrate OCR software into the workflow."

"With the work that we've done with ReadSoft, it's not a big step now to take the information delivered to us by employers or another fund electronically, rather than scanning the paper and turning it into a data stream."

## ReadSoft teams up with TRIM

ReadSoft has announced a partnership with HP to deliver end to end capture, archive and retrieval solutions to SAP users in Australia and New Zealand. SAP users can avail themselves of a HP TRIM archive solution to view archived documents such as supplier invoices using a Web Interface or from within their SAP GUI.

Most government agencies running SAP use HP TRIM for records and document management, so ReadSoft wants to be the go-to-guys for Procure to Pay automation.

The combined solution will enable companies to capture all their supplier invoices received in any format

and store the image into TRIM's ArchiveLink certified module. The stored image becomes linked to the invoice data (session) and is able to be viewed against all captured invoice and purchase order data within SAP.

Invoices that require exception handling or coding from outside of Accounts Payable will still be able to be viewed as an electronic image.

HP itself uses ReadSoft software to automate over 600,000 supplier invoices per year into its SAP system.

"Customers will be able to automate and streamline most processes around Procure to Pay using the end to end solution built on ReadSoft and HP TRIM," said Frank Volckmar, Managing Director for ReadSoft Oceania.



# Objective cements \$10M Defence deal

Defence has signalled the way forward for its electronic document & records management with a major upgrade to the latest version of Objective 7.5 for more than 25,000 users within Australia.

Defence is also preparing the business case for a huge initiative to extend the reach of Objective to up to 40,000 additional users within Australia and in operational areas across the globe, wherever Australia's Defence Forces are engaged.

Formally announcing its ongoing agreement with the Australian Defence organisation, Objective has revealed that it will represent a minimum value of \$A10m over the next five years.

Tony Corcoran, Assistant Secretary, Freedom of Information & Information Management at the Department of Defence, said the Objective rollout would involve a massive cultural change within Defence.

"There is a distinct lack of common business rules, and work areas are filling this void by making their own. They are currently using ad hoc arrangements to store records, which can range from printing them out and storing them on paper, stored in Outlook, on shared drives and personal drives..

"We need to ensure that all Defence personnel become aware that record-keeping is a prime responsibility."

Defence first selected Objective in 2000 for a staged rollout. It is currently available to around 25,000 users on its "Restricted Network" and "Secret Network" within Australia.

An upgrade from Objective 6.3 to Objective 7.5 for users on these two networks is due to be completed at in September 2010.

According to the department, "This product represents a significant improvement over the current product and provides



Defence with a more user-friendly system that offers such improved functionality as 'drag and drop' from Outlook, enhanced search capability and the possibility of a single sign-on approach in future."

"A roll-out across the remainder of the organisation is expected to occur over the following two-year period, although this is still being investigated".

Tony Walls, CEO, Objective Corporation said, "This contract evidences our successful history with Defence. It also illustrates the value that our customers receive from Objective's investment and commitment to research and development."

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# Banking on SharePoint



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When they need to find a colleague who can assist with particular expertise, a quick People search will throw up some appropriate suggestions among many nationwide colleagues, who may even be online that moment and ready for a videoconference to help fill in the blanks on a particular subject.

The Commonwealth Bank is building an environment to make all this possible through SharePoint 2007, which has been deployed over the past 18 months to replace an ageing intranet platform.

A small centralised team of 5-10 staff were previously responsible for maintaining intranet content, with the result that content was not regularly updated and hence the intranet was not well used.

An intranet has gone off course when staff see it as just as a company home page that they click off before they try and find stuff in Google.

"There was no collaborative focus and a long queue to get stuff up on the intranet, which ended up consisting of just the CEO's message and some news updates," said Scott Suine, Solution Delivery Manager at Commonwealth Bank of Australia.

Without any analytics, the bank was not even able to gauge its usage, and there was no intranet search engine deployed.

By 2009 there were up to 70,000 pages of content on the intranet, however less than half was up to date and staff were not using it

regularly. This resulted in a huge support burden. Half of the 13,000 calls to the bank's help desk each year were from staff asking where to find content on the intranet.

"The help desk was a costly search engine," said Suine.

In early 2009, the bank began developing the business case for a new collaboration platform, and the fact it already had SharePoint 2007 licensing as part of its Microsoft Enterprise agreement made it an attractive option.

The bank hoped to encourage greater use of the intranet by its 45,000 staff, and to slash help desk calls.

EMC Documentum provides the bank's document and Web content management backbone. Management wanted to exploit as much out of SharePoint's out-of-the-box functionality as possible, and avoid having to commit a large team of .Net developers.

In collaboration with systems integrator CSG, the bank built up a proof of concept for the first phase which it proceeded to implement in three months using some high profile business units.

Up to 50,000 pages were identified as being required to migrate to SharePoint within the first 12 months; while new capabilities such as blogging, videoconferencing, online realtime polling and integrated search were to be offered.

By June 2010 the bulk of the bank's intranet sites had been



THE COMMONWEALTH BANK HAS DEPLOYED SHAREPOINT 2007 OVER THE PAST 18 MONTHS TO REPLACE AN AGEING INTRANET PLATFORM.

migrated, and there are now more than 250 content authors instead of just four.

"We have also put a strong governance model in place to ensure the right content is in the right place and it is always relevant and up to date," said Suine.

Some of the SharePoint functionality that is being embraced by the bank includes the new People Search capability, group knowledge base, and form-driven applications.

The use of SharePoint MySites has not been provided, as the bank still wants Documentum to act as the main document repository.

SharePoint People Searches draw on information extracted from the bank's PeopleSoft human resource management systems via Active Directory.

## Web 2.0 revolution

The availability of Web 2.0 tools on the intranet has been a major culture change for the bank, one that is easier for the younger generation to embrace.

It's not just a case of "build it and they will come," according to Suine.

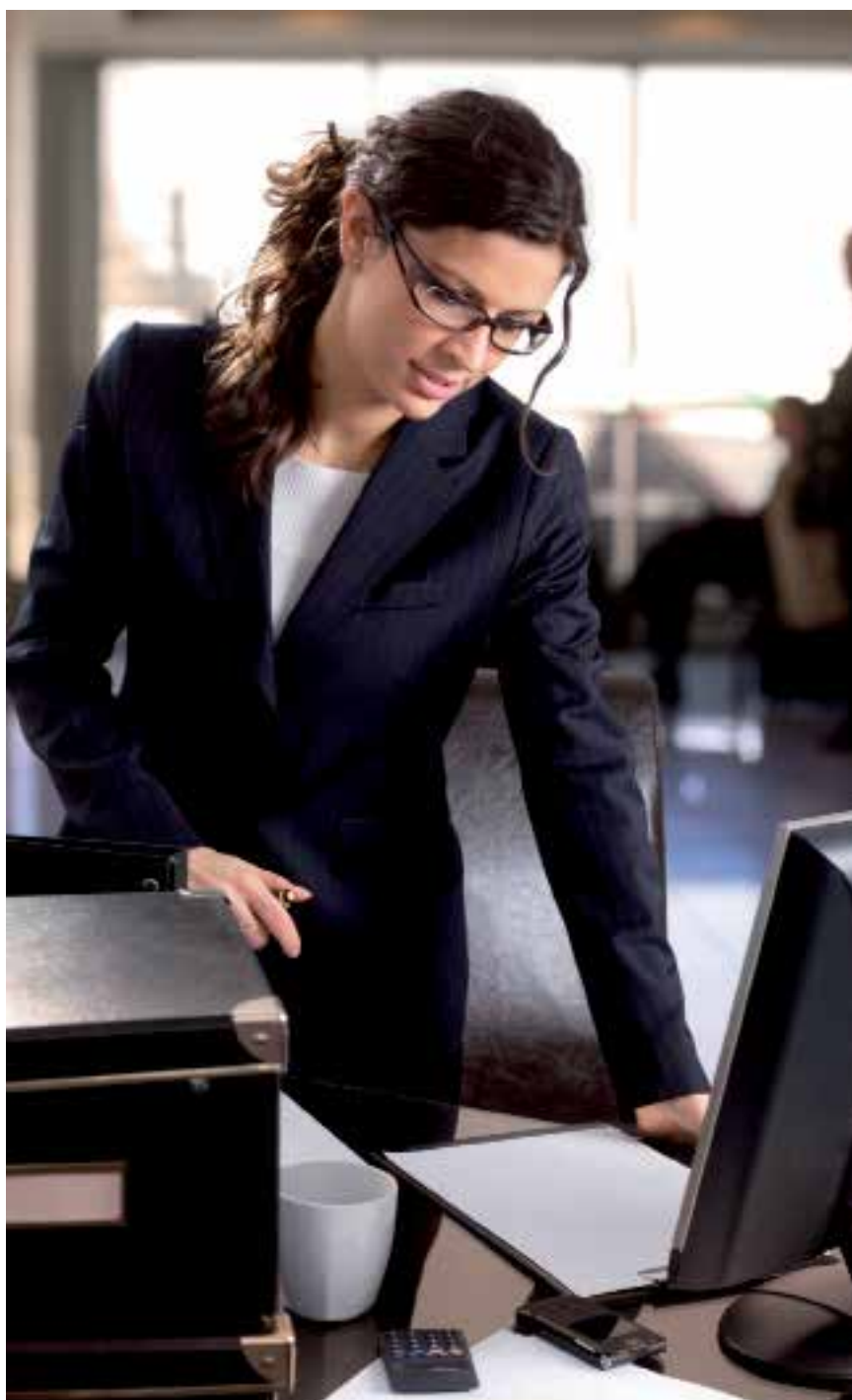
"To get high level executives to blog took some doing" he said. "There is a wide variation of computer literacy across the bank."

Some unique approaches to archiving had to be developed in some areas, for instance, where the bank faced stringent legislative requirements to keep the entire structure of an intranet site at a point in time. This is handled using a tool called Offline Explorer.

Visual Basic has been the toolkit for providing customised applications until now, although Suine is keen to see the bank's non-technical staff work with non-programming tools to develop individual workflows.

One tangible result of the SharePoint rollout at CBA has been a healthy reduction of more than half of those help desk calls initiated by staff, who could not find what they needed on the previous intranet.

A major task was to migrate eight separate knowledge repositories



THE AVAILABILITY OF WEB 2.0 TOOLS ON THE INTRANET HAS BEEN A MAJOR CULTURE CHANGE FOR THE BANK, ONE THAT IS EASIER FOR THE YOUNGER GENERATION TO EMBRACE.

into one centralised knowledge base of 125,000 pages of reference material, policy documents and product information.

The next phase of development for SharePoint at the Commonwealth Bank will see the complete migration of existing sites from the old intranet, and the implementation of FAST 2010 search.

Documentum has recently been updated to the latest version which offers enhanced integration functions, while a migration to SharePoint 2010 will commence shortly.



# The records challenge

Stuart Finlayson asked three Australian organisations how they are facing up to the challenge of records management for in the transition from paper to digital documents



## The Premier State

The State Records Department of New South Wales (State Records) is the NSW Government's archives and records management authority. It manages the NSW State archives collection, sets the rules, and provides guidance on the management of official records. Its off-budget Government Records Repository (GRR) provides records storage services to the public sector.

Cassandra Findlay, Senior Policy Officer, Government Recordkeeping, is a leading voice on the challenges of records management in the digital age.

Findlay says that the ever increasing volume of digital records in government makes the implementation of routine disposal practices more important than ever.

"The argument that all information can be retained forever because 'storage is cheap' is not a reasonable one in the face of the information explosion, increased expectations of openness in government, and the complexities of migrating a wide variety of formats forward, as systems change. In 2008, Diane Bryant, the CIO of Intel, predicted that her company would double its storage costs by 2012, and she said this was unsustainable."

Effective management and disposal of records in both paper and digital form - according to State Records - starts with their capture into recordkeeping systems, to enable organisations to differentiate

between valuable business records and information that can be deleted or destroyed to free up space or improve system performance.

"It is important to remember that the scope of digital information that can be better managed in record-keeping systems is not limited to unstructured, 'document' type information", notes Findlay.

"Government organisations in NSW are implementing

recordkeeping strategies for a wide range of information types, from the products of Gov 2.0 activities and online community engagement, to business systems information and data created 'in the cloud'."

Of course, as Findlay points out, disposal is not just about getting rid of information it is also about knowing how long to retain information.

"Many digital records will be being required for a long time (such as digital plans of major infrastructure). So, just as it is important to destroy those records that are no longer required, it is important that those records that are retained long term are protected from loss or harm. In the paper world this usually means secure storage, climate controlled conditions and proper housing. In the digital world, records face a different set of threats."

"As a general observation we would also note that the move by organisations to digital recordkeeping affords many benefits to the business - better information sharing, improved accessibility, capacity to integrate recordkeeping requirements with business processes," adds Findlay.

State Records offers a range of tools and guidance on digital recordkeeping, records disposal and the preservation of digital records on its website at [www.records.nsw.gov.au](http://www.records.nsw.gov.au), as well as regular digital recordkeeping news and case studies via the Future Proof blog: <http://futureproof.records.nsw.gov.au/> and on Twitter; <http://twitter.com/FutureProofNSW>

## Avoiding Northern Exposure

Situated on the northern outskirts of Sydney, Hornsby Shire is a sprawling expanse that stretches from the suburb of Eastwood right to the town of Wisemans Ferry, around 40km to the north of Sydney's northernmost suburbs.

It covers the largest land mass of any of the Sydney regional councils, encompassing around 20 suburbs and about the same amount of rural towns north of the city limits.

Given that at the last count, it was responsible for over 155,000 residents, Hornsby Shire Council clearly has a substantial task on its hands in managing information.

Bob Jackman is the man responsible for co-ordinating records at Hornsby Shire Council.



"The digital world still requires the same records management focus that applied in the paper world (know what you have, know how long you have to keep it, know where it is and dispose of it in a timely and authorised manner" - Cassandra Findlay, Senior Policy Officer, Government Recordkeeping, State Records (NSW).

**BECAUSE EVERYTHING THAT COMES INTO  
THE ORGANISATION IS SCANNED, THIS  
COUNCIL DOES NOT HAVE AN ISSUE WITH  
THE PHYSICAL ARCHIVES INCREASING IN SIZE."**

The council has approximately 400 PC users that access enterprise applications through Councils Online such as Pathway, Masterview, Kronos (for timesheet entry), Oracle applications and HP TRIM. The council has been using TRIM context as a fully electronic system since 2004, the adoption of which, says Jackman, has presented him with a whole set of challenges.

"Training of staff in use of TRIM is a major challenge. Face to face training is being delivered to new staff, but additional online training is being investigated as a means of delivering TRIM training on day one, as well as enabling staff who have forgotten the fundamentals to receive refresher training. Contact management is another issue that is being dealt with by collaborating with Information Systems staff who have overall control of contacts."

Jackman has an interesting approach when it comes to physical archives, particularly when it comes to deciding what to retain and what to dispose of.

"This Council does not have a big issue with physical archives. A lot of old records are still held in archives which are not referenced by the current system, and all that is required to discard them is courage. Because everything that comes into the organisation is scanned, this Council does not have an issue with the physical archives increasing in size."

The council recognises the challenge of getting users to follow records management guidelines and has a plan in place to install TRIM delegates in each operational area that relies on TRIM for its records, explains Jackman.

"TRIM folders are assigned to operational areas, so that TRIM Delegates can then readily see the folders their area is responsible for. Rules for when to use each TRIM folder along with Standard Titling are recorded against the folder. Adherence to titling guidelines and the recording of author and addressee are the main aspects the TRIM delegate is requested to keep a check on.

"Senior Records Officers are responsible for liaising with delegates, and a TRIM resource centre for delegates is maintained on an internal intranet. Information sheets for various aspects of TRIM can be obtained from the resource centre. Another instrument for dealing with the challenges is to continually inform users through the publication of a quarterly newsletter, which is distributed to all staff electronically."

## Digital v paper

To avoid being buried under an avalanche of paper, Hornsby Shire Council, like all other councils operating under the auspices of the NSW Government, has a policy in place whereby new paper records that are received and scanned are then registered into



"There is a huge year on year growth in emails being registered in TRIM, primarily due to the ease of use and convenience of email as a tool by the public to contact its elected representatives, as well as internal emails being registered on an increasing basis." - Bob Jackman, Records Coordinator, Hornsby Shire Council.

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TRIM and subsequently discarded after six months, in line with GDA (General Retention and Disposal Authority – administered to the NSW public sector by the State Records Authority of NSW).

Electronic folders are assigned a retention schedule, which is passed on to all documents within that folder. The TRIM records system can identify any document which has not been actioned during the retention period. Such documents can then be purged from the system. This council has not undertaken purging of documents as yet. The same methodology applies to hard copy files.

As for the application of preservation to relevant records in the event or expectation of legislation requiring the council to do so, Jackman says they fulfil this requirement by placing a retention schedule on folders or hard copy files.

Meanwhile, email is responsible for the largest increase in electronic records at the council, with a higher percentage of emails placed in the system each year.

While the proportion of records in Hornsby Shire Council that are unmanaged stands at zero, at least as far as Jackman is aware in any case, neither Jackman or his staff are resting on their laurels, as there will always be challenges ahead and improvements to be made. One notable challenge, says Jackman, is around Web 2.0.

“The sharing of information is always a challenge. Even when an email group is set up, it does not guarantee feedback from participants. If a discussion group were set up on the intranet or internet, take up would still be an issue. Face to face meetings of user groups are also not guaranteed to produce improvement in knowledge, often due to the terms of reference being too broad.”

## Fishing for information

The Australian Fisheries Management Authority (AFMA) is an organisation of some 230 staff, with a main office located in Canberra and other offices in Darwin and on Thursday Island (this is the main administrative and commercial centre of the Torres Strait Islands, situated off the Cape York Peninsula in far northern Queensland).

AFMA is responsible for the efficient management and sustainable use of Commonwealth fish resources on behalf of the Australian community, and another Australian government body that relies on TRIM for managing corporate, administrative and functional records.

It also uses Finance financials and the Chris 21 Human Resource System.

While AFMA does not have a dedicated EDRMS in place at this stage, plans are at an advanced stage to install an interface or portal to TRIM in the coming weeks, which will provide a single gateway for staff to access TRIM, including remote access. This will enable Google-style searching, requests for file creation directly into TRIM, resulting in improved turnaround for file creation requests, and other features to improve file handling.

“The portal will prepare the ground for achieving EDRM in AFMA by staff learning to use it in a paper-based environment before moving on to electronic recordkeeping”, explains Thomas Kaufhold, Records and Office Manager at AFMA.

“AFMA is a small organisation which provides both opportunities and challenges”, he adds.

“The main challenge is to have the financial resources to fund initiatives such as EDRM, which can be too costly for small organisations to implement. However, given the small nature of the organisation, the opportunity to ‘get it right’ is more likely, given hard work and the right strategies in place.”

## Use it or lose it

Like many other organisations, AFMA has issues with physical archives. It has a considerable backlog of paper records which require disposal action. In 2009 a records disposal program was put into place to help AFMA take control of the situation. Since the program's implementation, some 20 percent of files held in secondary storage have been examined and sentenced for destruction or retention.

AFMA expects to achieve similar results in the coming years.

Therefore, at the moment, AFMA is only digitising a small amount of content received by the public or clients. This is expected to increase at a modest rate as resources allow and to meet immediate business requirements.

Kaufhold admits that identifying what to retain and what not to can pose problems.

“Sometimes it is not that easy to identify documents ready for disposal. However, we generally examine files for disposal more than five years old against the AFMA Records Authority issued by the National Archives of Australia (NAA). The Records Authority allows us to make decisions on how long records should be kept and gives us the authority to destroy or retain records under the Archives ACT 1983.

“Disposal action details on files are updated in TRIM. To ensure disposal action is in line with policy and procedures, only Records Management staff take disposal action on files.”

A revised Records Management Policy and new procedures have recently been released which provides a solid basis for the training program and the day to day work for managing records at AFMA. Additionally, Kaufhold says the advantage of working in a smaller organisation allows a more personal approach, and records management staff are able to touch base with staff at one stage or another.

“AFMA has a reasonable record-keeping culture, better than most of the organisations I have worked for in the past. Naturally, there are always instances where guidelines are not followed, either by inaction, lack of knowledge or appreciation.

“AFMA management is very aware of the value of good record-keeping and promotes it throughout the organisation. For example, the executive had recently decided that records management training is mandatory for all staff to attend.”

## No stone left unturned

According to Kaufhold, the AFMA Records Management Policy is quite clear in its stipulation that all records must be maintained in the official recordkeeping system, i.e. TRIM. This includes business-related emails, which must be printed and attached to the paper file.

“Informal systems are outlawed”, says Kaufhold. “This is not to say that informal systems don't crop up, as we do come across them from time to time when undertaking file audits or during our daily dealings with staff.”

The same level of scrutiny applies to the preservation of relevant records that AFMA may be required to produce through a legislative process.

“The proper application of the Records Authority by experienced staff and ongoing vigilance of changes in business, and other requirements, should result in records being preserved to meet these needs”, says Kaufhold.

AFMA has also embarked on significant upgrades to system software, infrastructure and enterprise applications over the last few years. This has resulted in a sharp increase in electronic records or data being captured and processed. This has now plateaued and should remain so over the next few years. However when EDRMS is implemented, Kaufhold says there will be a significant increase in the keeping of electronic records.



Thomas Kaufhold, Records and Office Manager at the Australian Fisheries Management Authority (AFMA), where business-related emails must be printed and attached to the paper file.



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## DataBasics

# FOI evolves to enshrine the public's right to information

By David Schulz

The introduction of Freedom of Information (FOI) legislation into Australia in the 1980s marked a significant departure from the traditional British bureaucratic notion of "official secrets".

This legislation had a marked impact on the flow of information from government to the community. Less obvious has been how FOI has shaped management of access to records.

As FOI evolves into a broader Right to Information (RTI), what will be the impact on the use of information within agencies and how can staff address these changes?

**Its Time!**... ran the election campaign slogan, but it took a decade for Whitlam's 1972 campaign platform of transparent government to find legislative voice in the final days of the Fraser government.

The Freedom of Information Act (1982) maintained that information in the public services was to remain confidential, but specific classes of information could be released to the public if a formal request was submitted for information to be released.

Freedom of information was expected to transform the relationship between a government and its community. The constraints of paper-based files and the costs and difficulty of submitting requests limited the practical value of FOI for the everyday citizen.

While FOI served as a useful tool for the media and commercial organisations, the real change wrought by FOI has been inside government.

## Access in a digital world

The transition to electronic content management solutions, and the impact of FOI on government culture, highlighted the gap between document access policy and legitimate information needs.

Many organisations had a matrix of access controls that reflected the levels and branches of the organisation chart. For example, junior staff were denied access to confidential files and staff could only access files allocated to their department.

Records officers would valiantly enforce these complex security models, however once the file was out in the organisation, a more practical approach prevailed. Once electronic systems rigidly enforced the security model it quickly became clear that traditional security policies did not reflect the real information needs of the organisation.

In fact, matrix security models often meant that people working in the organisation were prevented from accessing documents that a member of the public could access through an FOI application. This problem was most apparent in the frustrations many FOI officers encountered in not having visibility of documents in the system that nevertheless were able to be released to the public.

As a result, FOI radically transformed the document access restrictions within government agencies. Recognition of the real information needs within the organisation and the broadening of the documents made available to the public prompted a transition to simplified security models.

While matrix models are focussed on complex access control within the agency, a simplified model is more outwardly looking, primarily seeking to define public documents versus those documents that are available only within the organisation.

The passage of the Labor Government's Freedom of Information Amendment (Reform) Act in May signalled a federal intent to reshape the relationship between government and community. More change is on the way.

This reform of the Federal Freedom of Information Act instituted a right to information that is also reflected in recent legislative changes in Queensland, New South Wales, Northern Territory and Tasmania.

The two key principles which distinguish RTI from FOI are:

- 1) a presumption that information is public ;and
- 2) a responsibility to pro-actively publish public information.

The clear intent is that formal applications for access to information should be a last resort. Instead, it is envisaged that the community will have direct access to the public information of an agency through its Web site.

WHILE FOI SERVED AS A USEFUL TOOL  
FOR THE MEDIA AND COMMERCIAL  
ORGANISATIONS, THE REAL CHANGE  
WROUGHT BY FOI HAS BEEN INSIDE  
GOVERNMENT.

With such a significant volume of information now publicly available, agencies will require a web capability that allows citizens to search and retrieve public documents directly from their records system.

## First steps

It is clear the government is keen for more transparency and better engagement with their communities through increased access to information. But what does this mean for those managing the information and the records within government?

The quicker agencies transition to pro-active disclosure and web based self service, the less exposure they will have to increasing volumes of informal requests and formal applications.

For records managers, it means immediately reviewing classification schemas to identify public documents. When a document is classified as 'in confidence' it will be necessary to reference the public interest tests in your legislation that have been used to exclude the document from public access. A project will need to be established to retrospectively classify the existing repository.

For IT managers, the means to securely connect your web site to your existing information management solution is a new priority. This will involve assessing your infrastructure capability for native referencing of documents and functions such as URIs, depth and breadth of published web services and checking how deeply native support for web standards such as RSS and Open Search have been adopted.



David Schulz is Industry Solutions Manager for Objective Corporation

# Delivering digital damage control

Jill Nehrybecki asks why so many organisations fail to analyse their records management strategy before buying an EDRMS.

When a staff member puts pen to paper, keys anything into their PC or iPhone in your company's name, or speaks to anyone on the phone with regard to your business, it creates a record.

This record is an "event", and can come back to bite you. In the future, you will need to make sure that you can quickly lay your hands on this record, taken in its exact context to prove its authenticity or lack of it.

Most organisations have a "policy" on RM, or at least tell staff what to expect. Hopefully everyone is informed that it's important to be able to find things, and the organisation has an expectation in regard to observation of these policies.

However, while many are investing in electronic systems, they are then working backwards to create processes and policy to deal with the changing way records are stored, managed and made available.

Before any electronic system is selected and implemented, an analysis of actual RM requirements must be performed based upon the way you do business.

Too often, the CIO consults RM specialists after a system has been purchased, only to find that the system cannot deliver to exacting requirements without very deep pockets and understanding shareholders.

Ask BP whether records are important. As the Deepwater Horizon Oil Spill grew and the global community became more enraged by the pictures of dead pelicans, the real attack came from their own uncontrolled records.

While management scrambled to find documents to demonstrate a stellar maintenance record, authenticated copies of reports of interviews with former employees, transcripts of lawsuits, results of state enquires, and emails were sent to the authorities. These told a very different story. BP will eventually get its day in court to defend its position, but in the meantime the share price is in the toilet and competitors are circling.

Leaked documents, and the photos of dead pelicans, are actually speaking on behalf of BP.

A records strategy requires an appreciation of what records you need to have, how long



Jill Nehrybecki is managing director of Innov8, a specialist consultant in enterprise document management, CAD drawing management and business process.

*(Continued over)*

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# A question of perspective

By Brian Bailey

Thinking about Information and Records Management (IRM) challenges in terms of the fundamentals - people, process and technology - serves to highlight the disproportionate effort organisations expend on IT over other risk factors. This is not news of course, but it does raise some questions. Why the focus on IT risk? Will it always be so? Can organisations change and take on better practices? Or are organisations doomed to a high level of financial and reputational risk?

There is cultural lacuna, or gap, in organisational activity that has, in many cases, seen information and records management limited to a series of fragmented 'bottom up' efforts, rather than an enterprise approach. The primary driver for this gap is ownership; or rather a lack of ownership of IRM practices and outcomes most often dissipating into the cracks, between management reporting lines and departmental responsibilities.

The idea of 'the business' and 'IT' as more or less separate entities even within the same organisation has been a feature of the past two decades. A Records Management department is often a third entity in the mix (perhaps with a paper focus and a reporting line to Facilities Management).

Other quasi- IT stakeholder groups have also emerged, such as Management Information Systems to manage reporting and an Information Management team to manage office-centric tools such as intranets. It's easy to see even within this grossly simplified picture that if nothing else, it is easier to focus on localised IT risks rather than address the complexities of human behaviours at an enterprise level.

The risks are real. There are sufficient recent recent examples of records management gone wrong to give government officials, executives, and directors sleepless nights.

What about "Climategate" as a prime example. When the findings of critical research into Climate Change were called into question after the University of East Anglia's Climatic Research Unit was unable to produce raw data for independent analysis. Amid accusations of fraud, or selective data use, it was claimed that models could not be reliably verified or re-produced. The failure to retain this data caused inestimable reputational damage to the whole climate change movement prior to the Copenhagen climate change conference of 2009.

There are many other instances. The failure by the Japanese Social Insurance Agency to manage electronic records for the full length of time that they were needed caused a government crisis in 2007. The introduction of a new pension scheme meant that multiple pension numbers from previous systems were integrated into a single pension number for each person. Records were not properly transferred, so 50 million pension records couldn't be linked to the individuals who had made the payments.

## Time to get real

Record-keeping strategies have to be applied in a real world amid competing, even conflicting pressures. In many cases, information and records management efforts have been restricted to office software and its outputs, paper and electronic documents.

The difficulty with proposing new approaches to ensure the authenticity, integrity, usability and availability of records in business transaction processing systems, is that many regard those systems as 'off limits'. While some governance progress has been made in the office documentation space, business systems have been comparatively neglected.

Recently there has been increased interest in Enterprise Content Management (ECM) and Enterprise Records Management (ERM); two overlapping approaches that have brought change and renewed opportunity for holistic enterprise information and records strategies. A key link between Recordkeeping, Data and Information Management is an understanding of business information risks and a willingness to address and mitigate those risks. Enterprise

## Steps to success

When developing a strong recordkeeping governance framework, there are many risk-based decisions to be taken and these need to be assessed, documented prioritised and framed as actions to address recordkeeping risks, based on international standards.

The aim should be to take a simple, self-assessment checklist in order to assess your organisation's preparedness, and to ensure that record-keeping governance can be monitored, reviewed and audited, empowering executives to act.

1. Assess the importance of the organisation's record holdings;
2. Assess all the recordkeeping risks, sensitivity and points of vulnerability;
3. Develop a plan for managing risks, including proactive mitigation steps and what to do if things go wrong;
4. Inform staff of their roles and responsibilities to manage recordkeeping risks, and make it a performance measure;
5. Acquire the right skills and capability to manage records through a program of systematic control;
6. Ensure that recordkeeping standards are embedded in business processes, there are sufficient points of review and auditing standards are met;
7. Ensure processes are monitored, checked and reviewed. New risks can emerge from different sources and in countless numbers of ways. Risk management requires a continuous improvement approach;
8. Keep management informed of the record-keeping risks, in the same way they receive regular updates on personnel and finance; and
9. Take on an incident management approach and ensure a prompt response to mitigate the impacts of risks. Security breaches will occur. Organisations need to detect and response promptly to minimise the harm.



Brian is Business Development Manager with Recordkeeping Innovation. He has held knowledge, information and data management roles with Optus, KPMG, Ernst & Young, Gadens Lawyers and The Copyright Agency and holds a Master's Degree in Information Innovation from RMIT.

Content Management (ECM) is powered by several important business drivers: improved compliance; reduced costs; enhanced internal and external collaboration; and greater levels of business sustainability. Importantly, Enterprise Content Management forces the focus on the content, not the container. Information workers don't care if the content they need comes from a database or a document management system.

This brings an opportunity. Business systems – databases – have been largely in the domain of IT departments. While record-keeping hasn't been a priority, much work has been done on technology centric support initiatives such as Management Information Systems (MIS), Business Intelligence (BI), Data Warehousing (DW), and data integrity initiatives such as Master Data Management (MDM).

Strategically addressing data management and information management functions provides a foundation for Enterprise Information Management and an opportunity to insert smart recordkeeping approaches into all systems, databases or documents.

We are now seeing a widespread interest in organising data and information across business and technology silos, an activity that engages the business and IT. With the help of a risk-based focus, this can link business transformation to real business needs.

## Does records management matter?

(from page 21)

you should retain them and where they are. Some tough questions must be asked up front:

Who owns or is responsible for your organisation's records? Who decides what an "important" record is anyway? How do they decide?

Do you know what information is in archive boxes, off-site in a storage facility, or attached to emails in a cancelled account of a former staff member;

Can your staff simply delete records at will? Are they aware if they have already been used to make a business decision or its particular retention period?

Are your documents and electronic files protected from misuse or uncontrolled transmission?

Are you sure that in the event of an industrial accident that you can prove that your plant and every piece of equipment was built to standard and has been fully maintained? Can any disgruntled staff or your competitor already gain access to records that prove it isn't (BP is learning this one for you)?

If you are dragged into litigation, that saying "sorry your honour I can't locate that record but I know I typed it/read it" doesn't wash. It is just as reliable as "I forgot my homework" used to be.

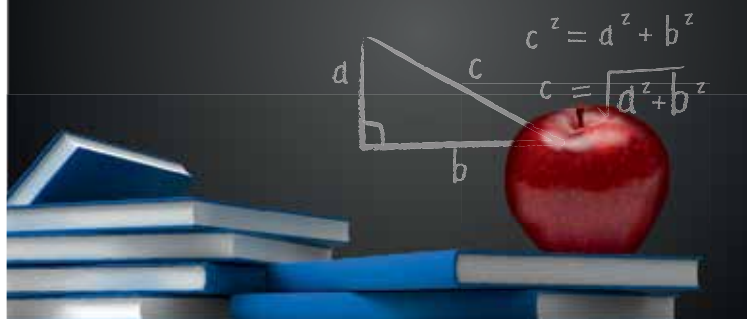
If the document or record you need to recover was created on a very old version of software or decommissioned system, how long would it take to load the redundant software to recover it?

When you read document, how sure are you that it is the latest version and that no later version exists?

Do you know if all members of your staff are referring to the same version of documents, and tell the truth when they offer advice or make claims on behalf of your company? RM is no silver bullet or solve-all solution. It's simply a way to be sure that your records and documentation comply, are under your complete control, easy to find, and only available to those with your absolute permission to make honest use of them.

A well-managed information strategy puts you in a better position to deal with any surprise leaks, and put a cap on them before they cause widespread damage.

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# TARDIS sends HomeStart SA to a SharePoint future

With the help of a project dubbed TARDIS, HomeStart Finance has mapped out its path along the road to information management nirvana.

HomeStart Finance has spent the past three years placing SharePoint at the heart of its EDRMS strategy, in what has been dubbed Project TARDIS, standing for Timely Access to Records, Documents, Information and Systems.

HomeStart Finance is South Australia's leading provider of affordable home loans. Established by the South Australian Government in 1989, it has helped more than 56,000 households achieve their home ownership goals.

HomeStart offer a unique range of home loans to help people overcome the obstacles to home ownership. This includes home loans that can boost what you can borrow while keeping repayments manageable.

"Physical records have been handled very well at this organisation," said Michael Veasey, HomeStart's Manager of Information Technology, "but when we began this project in late 2007 we were concerned about the way we were dealing with electronic records."

HomeStart has 100 full time employees across two sites in South Australia, with a heavy concentration of Microsoft server and desktop products.

HomeStart's previous information environment could be described as transactional and paper based. This culture was influenced by the tool sets available to end users and a lack of consistent process review over a prolonged period of time.

Mortgage applications are submitted on paper and manually processed, with an electronic workflow system monitoring human workflow.

HomeStart is currently looking at scanning applications as a separate project that will feed into SharePoint.

A shared drive environment contained over 240GB of unstructured data.

"Previous attempts to implement a formal records management policy had focussed on compliance and failed," said Veasey.

"Our efforts were driven by a mandate from State Records here in SA that all government agencies have a compliant EDRMS in by 2010.

"Back in 2006/07 this was way too far off for anyone to care about. However when we shifted the focus to demonstrating the business benefits of using a collaboration portal as opposed to file shares, executives began to see the value," said Veasey.

After an early deployment of Windows SharePoint Services (WSS) in 2007 had impressed senior management, Veasey received the green light to implement a full SharePoint solution in December 2007.

An important part of the green light was the commitment of full

time resources to the project, and accordingly part-time records officer Trevor Bradley was promoted to the full time position of Information Asset Manager.

From here Bradley worked with specialist records management consultants Experience Matters to develop a full information management framework. This covered the entire spectrum, from strategy through to policies, procedures and training for staff.

It also included the development of a Business Classification Scheme and Records Disposal Schedule which Bradley, through working closely with IT, was able to interpret into a SharePoint information architecture.

HomeStart then engaged Microsoft Information Management specialist

Unique World for delivery of the eDRMS solution, and the RecordPoint records management platform based on SharePoint.

"By adding RecordPoint we expected to get tight integration with the corporate intranet allowing users to create and consume information through the one portal," said Veasey.

In addition to a collaboration platform, Veasey look to SharePoint to provide a robust, content-managed intranet that leveraged existing investments in Office, SQL, Exchange and other Microsoft products, with security through existing Active Directory groups, and able to be customised through common coding tools (ASP.Net and visual studio).

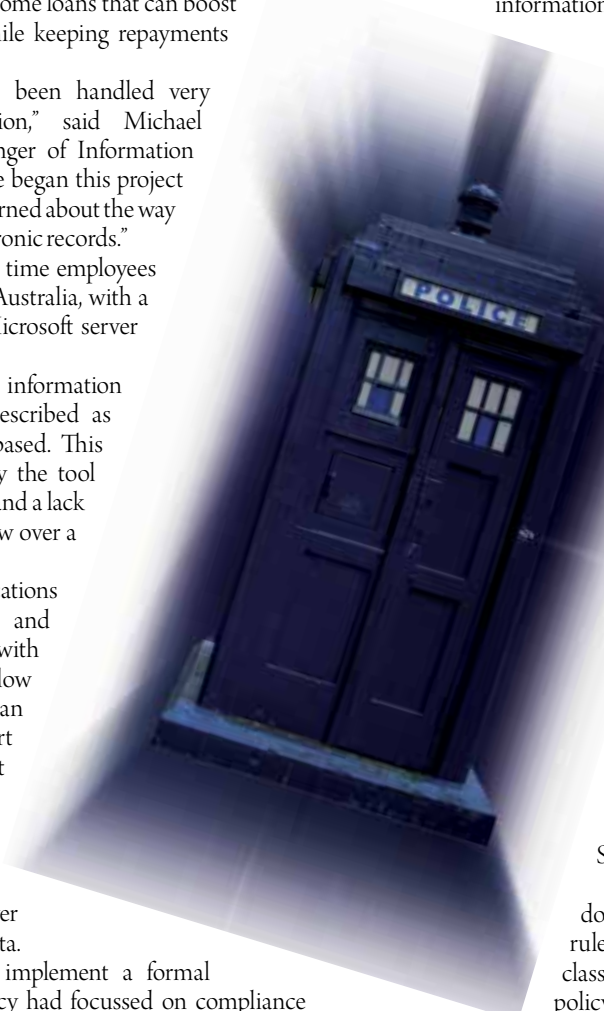
The solution delivered an eDRMS environment for all internal HomeStart end users. This included the enablement of SharePoint Search across network drives.

End users are now able to use SharePoint's document management functionality with rules configured to interpret user input, and then classify documents with an appropriate retention policy.

The solution enables business units to access vital business material while consistently applying security, retention and disposal to a larger portion of corporate information in an automated fashion. The eDRMS also has the capability to track and audit the movement of physical records across the organisation.

HomeStart's eDRMS solution delivers stable, controlled and centralised document management, introducing corporate-wide information management policies, and providing support frameworks such as induction and exit procedures.

It has helped HomeStart leverage its existing investment in Microsoft technology and, in so doing, increased usability for users and moved them closer to compliance with their statutory requirements.





Deploying the solution was not simply a technical challenge, the support of key senior executives was crucial to its success.

"The composition of our project team was important," said Veasey, "as was ongoing communication with staff throughout the life of the project."

The SharePoint/RecordPoint project was "branded" to help sell the message, with the title Project TARDIS (Timely Access to Records, Documents, Information and Systems).

"Our users had experienced Document Management (DM) through WSS and they liked it," said Veasey.

The advantages were many: check-in, check out, single instance storage, version control, consistent look and feel with existing intranet, tight integration with office, alerts on changes. However, the fact that SharePoint is not considered a records management system by Australian Standards was an issue.

"Microsoft announced that regional-based compliance issues would be handled by their partners," said Veasey, "and at the time RecordPoint was the only product mature enough to evaluate."

"RecordPoint lets our users focus on managing docs while RM just happens. It is making users aware of RM responsibilities while creating a DM culture," said Veasey.

The fact that support skills for SharePoint 2007 are easy to come by and the familiar Microsoft interface is easy for users to understand were other attractions.

When documents are created, HomeStart staff are prompted to pick a document template or content type from a predefined list, and metadata is automatically captured up front with mandatory fields.

Facing up to the challenge of migrating

documents from the network fileshare, Veasey elected not to use a dedicated tool that would automate the creation of metadata.

"These tools were quite expensive for our size organisation," he said.

"We drew a line in the sand and met with each area and identified their "Active Documents" and moved those across. Everything else sits on the file server and is read only. If someone wants to use one of those documents they are then forced to move it into the portal and assign in the correct metadata. We are also identifying directories on the file server that can be archived off so the attack space is slowly getting smaller."

HomeStart is using the in-built search functionality included with SharePoint 2007.



"Previous attempts to implement a formal records management policy had focussed on compliance and failed." – IT Manager Michael Veasey.

## Lessons Learned along the way

1. Complete support from senior management is essential. You can't get there by just talking about compliance
2. It's more resource-intensive than you think!
3. Put the effort into developing a records management (RM) framework, policy and procedures up front to help shape the design
4. Your RM specialists need to become knowledgeable in SharePoint and RecordPoint early and then take the lead on document library design
5. Consult, consult and consult again with users. You still won't get it 100% right but you will be close
6. Structured communication and training is essential to ensure a smooth transition
7. Control the environment or it will control you (have strict change, release and deployment processes and lots of documentation).



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# Raising standards

Barbara Reed sorts through the array of standards that apply to the recordkeeping discipline and explains why they matter.

What is it about standards, anyway? Why are there so many of them? Who sets them? Do they all fit together somehow, in a way we mere mortals can understand? And what do standards mean for the systems designed to manage records?

The key to understanding the standards landscape is to understand that there are a lot of different bodies setting standards, often independently. Within the Australasian recordkeeping community we have been working hard to keep the framework consistent, so confusion is minimised and standards are consistent. Well, we've been trying but the standards landscape is painted on a broad canvas!

## Formal standards

The summit of the standards-setting heap is ISO, the International Standards Organisation. This body is a non-government organisation that coordinates the development of consensus standards across a network of 163 separate national standards bodies. Individual countries belong to nominated committees within the ISO structure, and depending on the fees they pay, can vote, participate or observe.

Australia has the Secretariat for ISO TC46, SC11 which is the committee responsible for establishing record-keeping standards. But it is not a straightforward place – particularly in the digital world where everyone is discovering the relevance of standards for the management of digital documents and records. ISO doesn't really patrol disciplinary practice domains, so often times different communities working under different committees spring up writing standards that have relevance to recordkeeping. In particular, at the moment, the imaging community is writing relevant standards under a different committee (TC171).

All International Standards issued under ISO have gone through a (very painful) process of development. First the countries subscribed to the relevant committee nominate experts, who jointly work on the development of drafts. These drafts are subjected to a number of rounds of international voting by those countries at the relevant level of membership, and only get through if the final draft is approved by 75% of those countries. Getting international agreement on these things can be tough!

Underneath ISO, each individual country has a national standards body. The national standards body for Australia is Standards Australia. Within Standards Australia we have a committee – IT21 for Records Management. This body shadows the work done internationally, but also develops documents for issue as Australian Standards. Our committee shadows both the records and document management committees internationally (TC46 SC11 and TC171). In addition, we work very closely with Standards NZ to issue joint standards in this space.

We've been productive over the last 10 years, and many of our Australian Standards (Records Management, Recordkeeping metadata, work process analysis) have been picked up and translated into international standards which have greater breadth of impact.

## Jurisdiction based standards

Each jurisdiction, that is, the Australian Commonwealth, each of the States and Territories, and New Zealand, has independent public recordkeeping legislation that applies to their own patch. All public records legislation now includes the requirement to establish standards for their jurisdiction, against which public agencies are



monitored (this is a feature of so-called second-generation public records legislation).

So, each jurisdiction has a mandate to issue standards and guidelines specifically relevant to their own agencies. And issue them they do.

Individual jurisdictions can adopt or endorse international or Australian standards, but often because of the perceived constraints of their legislation, they write standards specific to their jurisdictions. So we find many different standards and guidelines covering the same basic space, but with particular relevance to individual localised jurisdictions.

**MANY OF OUR AUSTRALIAN STANDARDS  
HAVE BEEN PICKED UP AND TRANSLATED  
INTO INTERNATIONAL STANDARDS WHICH  
HAVE GREATER BREADTH OF IMPACT.**

Of particular importance in understanding the standards framework are jurisdictional standards for recordkeeping metadata and VERS. The iterative development of understandings about recordkeeping metadata has meant that nearly each jurisdiction has got a recordkeeping metadata element set, but the date of their issue will determine their sophistication.

Because of this, Standards Australia was approached to provide a harmonised view of recordkeeping metadata and that work is in progress. Important, too, in this space is the development of the VERS standard (see more below).

However, while this sounds complicated, it is not so bad, because all the recordkeeping regulatory agencies work collaboratively together. There are two overriding collaborative bodies, CAARA and ADRI. CAARA (Council of Australasian Archives and Records Authorities [www.caara.org.au](http://www.caara.org.au)) meets regularly and keeps the information flow going between the bodies.

CAARA focuses on cross jurisdictional issues, statistics, cooperation, and so on. Generally speaking, jurisdictions keep in touch about standards and guidelines. The second body, ADRI (Australasian Digital Recordkeeping Initiative [www.adri.org.au](http://www.adri.org.au)) is a subset of CAARA and has essentially the same members, but is

*(continued over)*

## What standards are relevant to records management in Australasia?

	ISO	Australian Standards	(Defacto) standards	Jurisdiction based standards
Management level	ISO 30300 (in progress) ISO 30301 (in progress)			
Records Management – General	ISO 15489-1 ISO 15489-2	Adopted		√
Analysis Techniques	ISO TR 26122	To be adopted	MIKE 2.0 methodology	e.g. DIRKS methodology
Compliance		HB 278		
Capture				√
Classification		HB 8317 (in progress)		√
Digitisation	ISO TR 13028	To be adopted		√
Long term electronic storage and access	ISO TR 18492 ISO TR 15801 ISO 14721	Adopted		√
Recordkeeping metadata	ISO 23081-1 ISO 23081-2	Adopted (element set in progress)		√
Discovery metadata	ISO 15836	AS 5044-1 AS 5044-2		√
Physical storage		AS 1015 (in progress)		√
Conversion and migration	ISO TR 13088 (in progress)			√
Software specifications	ISO 16175-1 (in progress) ISO 16175-3 (in progress)		DoD 5015-2 MoREQ 2 (in revision) ICA Modules 1-3	√ VERS

### International Standards

ISO 14721- 2003 Open Archival Information Systems  
ISO 15489-1:2001 Records Management, Part 1: General  
ISO 15489-2:2001 Records Management, Part 2: Guidelines  
ISO 15836:2003 The Dublin Core Metadata Element Set  
ISO 23081-1:2008 Metadata for Records, Part 1: Principles (adopted Australian Standard 2009)  
ISO 23081-2:2008 Metadata for Records, Part 2: Conceptual and Implementation issues

### International Standards in progress

ISO 16175-1 Principles and Functional Requirements for Records in Electronic Office Environments, Part 1: Overview and Statement of Principles  
ISO 16175-3 Principles and Functional Requirements for Records in Electronic Office Environments, Part 3: Guidelines and Functional Requirements for Records in Business Systems

ISO 30300 Management System for Records – Fundamentals and Vocabulary

ISO 30301 Management System for Records – Requirements  
International Standards: Technical Reports (in numeric order)

ISO TR 13008 (in progress): Digital Records Conversion and Migration Processes

ISO TR 13028:2010 Implementation Guidelines for Digitisation for Records (to be adopted as Australian Standard)

ISO TR 15801:2007 Electronic Imaging – Information Stored Electronically – Recommendations for Trustworthiness and Reliability (adopted in Australia)

ISO TR 18592:2005 Long Term Preservation of Electronic Document-based Information (adopted in Australia)

ISO TR 26122:2008 Work Process Analysis for Records (in progress as adoption for Australian Standard)

Australian Standards in addition to those above (in numeric order)

AS/NZ 5044-1:2002 AGLS Part 1: Reference Description  
AS/NZ 5044-2:2002 AGLS Part 2: Usage Guide

AS/NZ 1015 (in progress) Records Management: Physical

**Australian Standards: Handbooks**

HB 278:2009 Recordkeeping Compliance

HB 8317 (in progress) Records Classification

### Defacto Standards

DoD 5015.2 Department of Defense (USA) Electronic Records Management Software Applications – Design Criteria Standard

ICA Modules 3 part Principles and Functional Requirements for Records in Electronic Office Environments  
MIKE 2.0 Method for an Integrated Knowledge Environment, Open source methodology for Enterprise Information Management  
Req European Commission and DLM Forum Model Requirements for the Management of Electronic Records

### Jurisdictional standard

VERS Victorian Electronic Records Standard.





more focussed on digital recordkeeping issues.

Collaborative projects are undertaken, as well as some joint standards, - export protocols for digital records transfer, for example.

One of the most important products ADRI has produced is the 3-part Principles and Functional Requirements for Records in Electronic Office Environments (see table). There are also standards that are set by professional bodies. ICA, the International Council on Archives, is perhaps the most relevant to this discussion. The ICA, working through a co-sponsorship agreement with ADRI, developed the 3 part Principles and Functional Requirements for Records in Electronic Office Environments referenced above. So the ICA documents and the ADRI documents are the same thing (more about this below).

In the area of functional requirements, there are a number of projects that have relevance. The European Commission working with DLM Forum established a de facto European functional specification for records management software: MoReq (Model Requirements for the Management of Electronic Records). MoReq was revised to become MoReq 2 in 2008, and is currently being reconfigured into a more modular structure (MoReq2010). MoReq 2 (and its replacement MoReq2010) are compliance standards – that is, vendors can submit their products for certification against the technical specifications.

In the US, the very influential Department of Defense (DoD) has developed a set of functional requirements for records software initially for use within the DoD, itself. It has a compliance component, and vendors can submit their products against the functional specifications for certification. Within the US, this specification and program has been endorsed by the US government's records regulator – National Records and Archives Administration (NARA). This has become an industry de facto standard because of its widespread voluntary adoption by vendors.

## What does it all mean?

So many standards! But if you look at them, you can see they are all building on and referencing each other. They are not in conflict at all. This is very clearly by design. There is no point in building contradictory standards. And it also shows that there is a wealth of guidance.

There are lots of great documents out there. Standards are not mandatory, but voluntary and they represent either international or national consensus on professional best practice. A lot of our Australasian work has been influential at the international level. The formal standards are supported by Technical Reports which are more for general best practice guidance. They represent areas which are more subject to change as technology and implementation practice changes with time.

In particular, take note of the digitisation technical report (which is based on work by Archives New Zealand), and the work process analysis technical report (based on an Australian standard). These are really useful documents. The two handbooks issued

by Standards Australia are great resources – one for Compliance against ISO 15489; and a very recent product, the Records Classification Handbook. The other thing that we can see is that there is a lot of work currently going on and just about to come to fruition. The things marked 'in progress' in the above table should be issued either this year or early next year.

So, we've got an industry flagship standard – ISO 15489, and high level standards for recordkeeping metadata – ISO 23081. Other standards are relevant in this space, but have not been developed by our own community. These include Dublin Core for resource discovery (ISO 15386) and OAIS for digital repository design (ISO 14721).

A strategic realignment for recordkeeping is being proposed with the Management System for Records Standards (ISO 30300 and ISO 30301). These standards are currently being voted on, and have caused some controversy. The motivating idea for this initiative is to elevate recordkeeping 'out of the basement and onto the management agenda' as a critical cross organisational infrastructure piece.

As a Management System, these record-keeping standards become equated with Quality Management Systems, Environmental Management Systems and Information Security Management Systems. This is a strategic alignment of importance to us. However, in the process, Management Systems are also being made consistent, so there is a lot of text which is required to be consistent. There are standards bodies for Management Systems within the International Standards Organisation itself!

The individual jurisdictions also issue their own standards, as indicated above. These are relevant to the public sector bodies falling within the specific jurisdiction – and many are mandatory for specific jurisdictions, although there are too many to list here.

In general, it is fair to say that they will all reference Australian or International Standards, and provide tailored views of specific practices suited to the specific jurisdiction. Generally speaking, the guidance issued is compatible, and certainly references others in development. But, if you are a private organisation, you are not required to comply with any of these standards. On the other hand, they offer a great set of resources to reference for current best practice. It may be there is a need to bring in someone to navigate the number and complexities of the standards but the content can be highly valuable once identified and applied.

## Functional requirements for record systems

This is a somewhat controversial area for standard setting, with one view being that codifying software requirements stifles innovation in the technical means of achieving an outcome. This is an area of particular importance to software vendors who are often required to demonstrate compliance with specific functional requirements. For vendors, a unified set of standard requirements across the industry would make life easier. So, what requirements are out there?

There are 4 major specifications of relevance. These are DoD 5015.2, MoReq, ICA/ADRI/ISO, and VERS. So let's paint this corner of the picture:

## DoD 5015-2: Department of Defense 2007

The current specification of DoD 5015-2 is the third version of the specification. It defines the basic requirements based on operational, legislative and legal needs that must be met by records management application (RMA) products suited for use by the US Department of Defense. It also has additional modules which outline how RMAs should manage security classified records and for requirements to support the Freedom of Information Act, Privacy Act, and systems interoperability.

This specification, while developed for a specific organisation, has gained de facto standard status by its endorsement in 2008 by NARA (National Archives and Records Administration, US) and by its compliance program. Vendors submit products for

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ARE NOT REQUIRED TO COMPLY WITH  
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OTHER HAND, THEY OFFER A GREAT SET OF  
RESOURCES TO REFERENCE FOR CURRENT  
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certification against the requirements through demonstrations against performance scripts. A list of products which currently hold this certification is available at <http://jirc.fhu.disa.mil/recmgf/register.html>.

It is particularly important in the US market.

## MoReq 2 (2008) and MoReq 2010

MoReq, Model Requirements for the Management of Electronic Records, was first issued in 2001 and substantially revised for MoReq 2 in 2008. MoReq seeks to create a common European set of functional requirements for records. It is issued under the joint auspices of the European Commission and the DLM Forum. MoReq has been an important and influential statement of functional requirements.

With the reissue of MoReq2, a compliance program was established. Comments received from industry have led to a recent project, MoReq 2010, a current project to reconfigure MoReq 2 into a more streamlined specification featuring a mandatory core component and a set of extensible modular components. This project has just commenced and community consultation on requirements is currently underway.

MoReq has been particularly important in the European market.

## ICA Modules

In 2005, following a spate of specifications for records management software issued in different jurisdictions, ADRI co-sponsored with ICA (International Council on Archives) the development of a standardised framework for records management specifications. National Archives of Australia was the lead agency in this work, which was collaborative across Australasia and subsequently the international community. The result of this work is a 3-part publication, known by various different names depending on who is publishing it. But the ADRI, NAA and ICA publications are the same thing.

The three parts are:

Part 1: Overview and Statement of Principles

Part 2: Guidelines and Functional Requirements for Records in Electronic Office Environments

Part 3: Guidelines and Functional Requirement for Records in Business Systems.

The inclusion of Part 3 in particular was a significant advance on other specifications, in that it recognised and addressed the reality that records are being created (if not managed) in line of business systems. ICA proposed to the International Standards Organisation that these specifications be adopted as international standards. Voting on this proposal has just been finished, with adoption of Part 1 and Part 3 as international standards (ISO 16175).

Part 2, the functional requirements for records management software, did not receive the requisite approval votes.

The ICA and ISO documents do not have a compliance or certification framework associated with them. Because of the genesis of the development of these documents, these have particular relevance in the Australasian market, but representatives from 12 countries participated in developing these documents.

With the current work on MoReq2010 and the need to fill the vacuum of the absence of Part 2 of the ICA specifications, collaboration between these two initiatives is underway. While still in very early stages, it is expected that a single functional specification will be produced out of the MoReq2010 process which will address ICA's requirements also.

## VERS

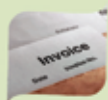
Standing separately to these general functional requirements, is the VERS standard. VERS is an initiative of the Public Record Office of Victoria. The VERS standard consists of 5 different specifications. At its heart, it is a format standard, specifying technical components required to create records as VEOs (VERS encapsulated objects) out of a current records management software system into a format which can be referenced, exported and imported, and be sustainable over changes to software systems.

Originally issued in 1999 (making it a very early and innovative specification) VERS was revised in 2003 to version 2 which continues to be current.

The VERS standard has a compliance component associated with it, and certification against any of the five specifications available. Compliant products are listed on the VERS website.



Barbara Reed, Director, Recordkeeping Innovation, is Head of the Australian Delegation to the International Standards Organisation Committee TC46, SC11 (Records Management), Deputy Chair of the ISO TC46, SC11 Committee, a member of IT 21, Standards Australia's Committee on Records Management, and a member of the Expert Review Group for MoReq2010.



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# BlueCielo online at ActewAGL

Australia's first multi-utility, ActewAGL has developed a complex drawing management solution using the BlueCielo Meridian Enterprise engineering content management system.

ActewAGL manages over 100,000 drawings and images using BlueCielo Meridian Enterprise, with a total volume of some 60GB in drawing data, made up of scanned, hybrid and AutoCAD drawings.

Steve Thompson, Manager of the Drawing Management System, said "ActewAGL, with the support of Onset Design, implemented BlueCielo Meridian Enterprise in 2003 which has proven to be an extremely reliable EDMS since going into production. BlueCielo Meridian Enterprise is very configurable and comes with many standard features.

"With the assistance of Onset Design we have designed and developed an environment that is highly respected by ActewAGL staff, and meets our current business requirements. BlueCielo Meridian Enterprise has provided ActewAGL with a very successful EDMS for managing our drawings and images".

Within electricity networks, ActewAGL owns the sub transmission and distribution networks within the ACT and is responsible for planning, developing, maintaining and operating these networks. In terms of the water network, the ACT draws supplies from three separate catchments – the Cotter River catchment, the Googong system, and the Murrumbidgee River. Water is delivered to 47 service reservoirs in the Canberra water supply system. Consumers receive water through a network of reticulated pipes divided into pressure zones served from one or more local service reservoirs.

## Moving to AutoCAD and Meridian

During the nineties the company used the GDS system from McDonnell-Douglas for CAD drafting and GIS mapping. In 1999 the company migrated around 80,000 drawings to DWG format for editing with AutoCAD Map and Raster Design and, at the same time, the asset mapping was migrated to ESRI.

With the introduction of the BlueCielo Meridian Enterprise for engineering content management, vaults were established to cater for Electricity Networks and Water Division. With around half of the drawings existing as images scanned from hardcopy, one of the key factors in selecting Meridian was its ability to manage hybrid files.

Rather than requiring a drawing to be saved entirely in CAD or image format, the hybrid format facilitates gradual vectorisation during the revisioning process. Combined with the ability to automatically retain previous revisions, this immediately improved the efficiency of the drafting process. The ability to compare drawing revisions, provided identification of duplicates during the initial import, and visually overlaying these changes delivers an ongoing benefit during the review and approval workflow stages.

Soon after the introduction of BlueCielo Meridian, Energy Networks realised the potential to emulate their hardcopy workflow and approval process by implementing this electronically within Meridian. Signed hardcopy had proven to be difficult to reproduce with digital documentation until Meridian workflows provided for drawings to be reviewed and released with email notifications and AutoCAD integration. This allowed approval dates to be automatically synchronized to the drawing title block. Additionally, a full audit trail provided instant verification.

As the other divisions within ActewAGL saw the success of BlueCielo Meridian within Energy Networks, this led to its adoption in other areas and the creation of drawing vaults for Properties (Facilities Management) and Ecowise (water monitoring).

The company chose to implement the Meridian database in MS-SQL format, taking advantage of existing infrastructure and leveraging their high level of existing corporate resourcing in this area. While more than one hundred drawing editors have Meridian installed on their desktop, most reviewers and approvers access Meridian via a Citrix client interface.

Similar to starting a standard desktop application, users select Meridian from the available Citrix applications in a Desktop menu. With comparable performance, this has proven a simpler method of standardised deployment to the enterprise.

Project teams working on site also access BlueCielo Meridian via its standard web interface. This approach was utilised by Water Division during the design of the enlarged Cotter dam to provide external consultants with access to drawings.

## A Flexible System

While Energy Networks has drawings categorised into areas such as Distribution and Zone Substations, Mains Construction (by suburb) and Public Lighting, BlueCielo Meridian had to be flexible enough to cater for a range of utility segments. In Water Division, drawings are divided into Dams, Water Treatment Plants, Sewage and a number of other areas. Customized navigation views also allow drawings to be viewed in relation to a project or geographical area, such as a Division or Suburb.

Within ActewAGL, the BlueCielo Meridian Enterprise software is referred to as the Electronic Drawing Management System (EDMS). The EDMS incorporates additional elements to make the system flexible, portable and robust.

The Meridian data and drawings are synchronised to regional servers for remote download, and this read-only format is downloaded to notebooks. The Canberra bushfires of 2003 highlighted the benefit of having the switching schematics available in a portable manner for field staff.

An in-house development, referred to as the Drawing Viewer, allows these critical drawings to be found and viewed in a standalone manner on isolated notebooks in the case of network or Internet availability failure.

Further in-house development includes CADGrab, which allows ESRI GIS data to be extracted to AutoCAD for the generation of new mains construction drawings.



Households traditionally deal with up to 4 separate utilities to handle their energy and waste needs, but around 156,000 occupants in the nation's capital have a single source for electricity, gas, water and wastewater services with ActewAGL Distribution.

# Drawing the line with SharePoint

**D**rawing management presents new challenges to Microsoft SharePoint, used by many as a business collaboration portal for distributing knowledge to the enterprise and optimising their business processes.

SharePoint provides storage and disclosure functionality for Office documents with metadata, check-in/check-out and revisions within portals. However, the management and disclosure of engineering content, such as drawings and specifications, with the complexity of associated relationships and their extensive approval processes, require additional functionality.

"While SharePoint is ideal as a business collaboration tool, it has limitations in how it can be used to manage and collaborate on technical engineering documents in areas of functionality such as revisioning, CAD integration, reference management, viewing and redlining, concurrent engineering and transmittal management," said Edwin van Dijk, director product management at BlueCielo ECM Solutions, a software developer in the field of engineering content management (ECM).

Van Dijk continued, "SharePoint also lacks full support for concurrent projects and tag-doc relations for asset information management (AIM). Each SharePoint site also has its own standalone data silo, resulting in multiple data repositories."

BlueCielo has launched a range of SharePoint integration solutions that enable the engineering content managed in its flagship solution Meridian Enterprise to be made available to the rest of the organisation through SharePoint, which can be used as an engineering collaboration portal.

"Within large organisations, multiple user groups need to be facilitated with the appropriate information and functionality. Internal user groups might consist of a viewer community, who need technical documentation for their everyday work but do not make changes to documents," van Dijk explained.

"It could also be that your organisation needs to work closely with external user groups such as contractors. The contractors may need the engineering content in order to execute their work or they might participate in the change process.

"In both cases though, you would not want to give them access rights to your Meridian Enterprise environment," he added.

Engineering content can be provided to SharePoint sites with the BlueCielo Publisher module for SharePoint.

If required, the documents can first be rendered into Adobe PDF format and, based on status changes in Meridian Enterprise, the documents, with their metadata, can be sent to SharePoint.

This assists when sharing information such as regulations, standards and procedures. The internal user community that requires engineering content for their own business processes can access the shared Meridian data through their specific SharePoint site. A Web part enables users to directly see the technical content that resides in Meridian Enterprise. This is, for example, useful in providing a SharePoint site to specific project teams, while the authoring process is fully managed within the ECM system. The web part will initially be provided as a Read-Only Web part, with the option to extend it with BlueCielo's viewer solution to view over 200 file formats.

Where collaboration is required with user groups outside an organisation, e.g. contractors who need to participate in a project, an Engineering Collaboration Portal can be created in SharePoint. This solution is based on BlueCielo's Global Collaboration Framework module. Documents in Meridian Enterprise can be identified for collaboration and made visible within a specific SharePoint site. In this site, new documents can be created and will be synchronised with Meridian Enterprise.

In September 2010, BlueCielo plans to release BlueCielo ProjectForce – a new .Net client that sits between the Web and a full executable (thick) client. BlueCielo ProjectForce will provide the engineering content management tools needed to ensure that engineering business processes can be fully supported within SharePoint for AEC/EPC projects. It will also support a wide range of CAD formats and provide functions such as transmittal management and project management.



Edwin van Dijk, director product management at BlueCielo, has announced a strategy to integrate its engineering content management (ECM) solution with the SharePoint platform.



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# Does DIY ediscovery measure up?

David McGrath explores the challenges of insourcing ediscovery. When does it make sense to leave it to the experts and what are the tools, processes and resources you need to be aware of?

As we explored in last edition's article, a thriving and nuanced ediscovery industry exists in Australia with many of our providers having been around for some time and quite rightly entitled to consider themselves world class.

There is in fact a growing trend towards insourcing some aspects of ediscovery. The 2009 Litigation Trends Survey by international law firm Fulbright & Jaworski LLP found that around one half of their respondents insourced an aspect of ediscovery.

We all know ediscovery can be expensive so wouldn't it make sense to do at least some of it yourself? You might be able to save some money whilst creating and retaining valuable knowledge about your processes and data assets for later reuse. Moreover, it can be an important driver for an improved information management strategy.

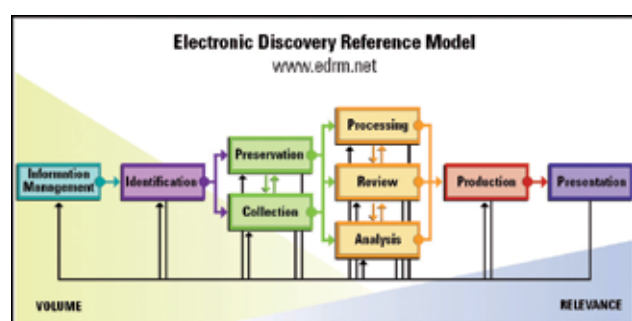
Obviously, the largest driver for insourcing ediscovery functions is your litigation profile. You can think of your litigation profile in terms of how often you anticipate being involved in litigation, or regulatory investigations, and what risk that poses to the organisation.

Some industries such as construction, pharmaceutical, financial services tend to have higher litigation profiles than others. A good initial test of course is the size of your current litigation spend.

## What Aspects to Insource?

So what does it mean to insource ediscovery and which parts of it are candidates for it?

To answer this question, let's begin with a good reference EDRM framework ([www.edrm.net](http://www.edrm.net)) developed by George Socha and Tom Gelbmann (pictured below) and focus on the four steps on the left hand side.



The steps that offer the greatest potential for insourcing are information management, identification, preservation and collection. There are reasons for this are:

**Its your data!** Subject to any outsourcing, cloud computing and Web 2.0 social technology considerations (flinging your data to unknown corners of the planet), it is assumed that the great majority of the data which needs to be considered for ediscovery is in your possession and under your control. Once the right volume of data has been identified, preserved and collected, a working copy can be easily passed onto your external lawyers and their bureaus for processing and review. Whether or not you use external service providers to assist, you need to be heavily engaged in these early stages of ediscovery anyway.

**Technical and business knowledge.** Again, irrespective of who else is involved in the ediscovery effort, knowledge of the



business, how information is captured, stored and disposed of, how the technology is set up and used will be key to these initial discovery steps.

**Compliance risk mitigation.** The greatest potential for ediscovery risk occurs early in the process. A failure to diligently scope the initial identification of potentially relevant data or failure to preserve potentially relevant data when litigation is anticipated can lead to disastrous outcomes. In America, the courts are becoming increasingly intolerant of ediscovery mistakes, with increasing and more frequent sanctions imposed whenever evidence is 'spoliated' i.e. damaged or destroyed. With the Australian courts coming under increasing pressure to reduce the costs of justice, it is only a matter of time before that same intolerance is shared by our own courts.

**Cost management.** In e-discovery, the biggest driver of costs is data volume. Whilst ensuring that you not miss relevant data in your discovery, it is equally important from a cost perspective that you "trim the fat" from your data set early. Better still don't collect too much of it in the first place. A good collection methodology together with effective data filtering systems will assist in keeping the data which needs to be processed and reviewed as trim as possible. It is important to note that, generally speaking, each successive step in the ediscovery process incurs a greater per document cost, so getting rid of unnecessary data is a crucial aspect of efficient management.

**Iterative Process.** What is emerging now is an understanding that to get the balance right between compliance and cost management, an iterative process is beneficial. This may be as simple as running different keyword searches and then sampling the results to see how effective those searches were as collecting the right data. The search terms can then be adjusted.

**Information management.** There is some debate over whether this is a formal part of the ediscovery process. What is clear is the impact that information management has on the success of your ediscovery effort. Information which is clearly categorised, organised and managed will be much easier to scope, collect and preserve than unstructured, scattered and disparate data. Depending on your litigation risk profile, those additional costs and risks can be another powerful argument for spending more earlier in the information lifecycle on information management.

The steps to the right of the EDRM diagram, such as processing, analysis, review and production, are more specialised ediscovery and legal activities. As an example, the processing of electronic

data in preparation for upload into a review tool is not for the faint-hearted and should not be attempted by anyone without specialist experience. There are also strong grounds to always outsource investigations involving computer forensics, not just from a competency perspective but to ensure that the investigation remains at arms length from the organisation.

## Getting Started

A lot can be achieved, particularly in the areas of information management and early response to litigation, by simply becoming more aware of the ediscovery process, and obligations, and then ensuring that the organisation has a plan for when litigation occurs.

Implementing some simple measures designed to avoid destruction of evidence once litigation is anticipated may well prevent a costly sanction and provide the biggest return on investment for your ediscovery insourcing effort. This step is important enough in the United States to have it its own name – “litigation hold”. The aim here is not so much to achieve best practice as a reasonable practice. It should examine areas such as backup tape rotation cycles, suspending document destruction operations and advising employees not to destroy potentially relevant documents.

Your ediscovery plan can go further and define processes for the identification and collection of data. Having a consistent approach built around properly considered policies and processes will assist. If something does go wrong it's nice to be able to say “look at our process and see what we have done right”.

It is important to note that putting procedures and policies in place particularly for the ‘litigation hold’ phase does not have to include the acquisition of any technology. It may be that your policy is to engage external partners to assist you with any work required at this stage.

## Adding Technology

There is a whole spectrum of technologies to support the functions of preservation through to search, collection and early case assessment.

The technologies are available on a component basis as well as ‘cradle to grave’. How you mix and match these technologies depends upon your skill profile and how much you want to bite off. If you are adding technology, it is important to note that you will need to have skilled staff to drive it.

It is also important to match the technologies with your data profile and ediscovery practices. For example, a full text search tool may be able to search unstructured data but how will it connect to SharePoint, email archives, database files, document or content management systems.

Also, once you identify potentially relevant hits how do you ensure that they are preserved and then collected and dealt with in a forensically sound way. There are a range of questions that need

to be answered here before the technology can be considered fit for the task.

There are a number of technologies branding themselves as either early case assessment or information management tools (or both). They are sometimes available as licensed software or more typically, an appliance solution. They offer functionality across the spectrum of search, collection, preservation, analysis and review. They are not forensic tools although they will usually claim forensically sound collection.

In effect, they offer organisations the opportunity to quickly search their electronic data and review it, on an iterative basis if necessary, so that they can quickly get a feel for their case and have a strong platform for further ediscovery, if required.

With the costs of ediscovery becoming disproportional to what's in stake in the case, understanding exactly what your documentary evidence says early in the case may well prove a crucial factor in deciding whether to fight the case or settle gracefully.

Insourcing ediscovery does not mean you have to do all of it by yourself. There are a variety of partners from consultants to full service providers to law firms who can assist you to design policies and procedures for dealing with ediscovery through to providing assistance to help you with your ediscovery effort.

In considering the addition of this expertise, again, a top down rather than bottom up approach is preferable. You will more likely get a better return on investment from employing management expertise who can design policies and procedures and actively manage your risks and costs through a combination of insourcing and outsourcing various areas of ediscovery.

Whether you choose to call it insourcing ediscovery or better information management, there is great scope for taking more control of ediscovery by insourcing some aspect of it.

In the next edition, we will look in more detail at the specifics of ediscovery insourcing including process, data management and a brief review of the software providers.



David McGrath is an independent e-discovery consultant with over 20 years experience. He holds degrees in Law and Technology. Through E-Litigation Solutions, David consults to corporates and law firms and publishes an e-discovery blog at [www.elitsolutions.com.au](http://www.elitsolutions.com.au)



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# Discovery with Nulegal

Anna Fry and Mark de Bruyn are the newest faces on the ediscovery scene in Australia with their new venture, NuLegal, taking on established players in the litigation support market.

**IDM:** Why have you established NuLegal and where do you see the opportunities emerging in Australia?

**AF:** There have been some big changes in the litigation support industry in recent times which we believe opens the door for a new service provider. The need for ediscovery services is continuing to grow and we think there is a need for some healthy competition to ensure that pricing remains competitive, while quality and efficiency improves.

**MB:** In Australia at the moment, there is a strong focus on reducing the time and cost of ediscovery particularly at the document review stage. This means there will be significant opportunities for players who can provide technology solutions to assist this process, as well as partner with their clients (rather than simply processing documents on their behalf) to manage ediscovery more efficiently.

**IDM:** What are the services and expertise you will be offering?

**MB:** NuLegal will offer the complete range of legal technology services including scanning, objective coding, electronic document processing, case management, electronic trial solutions, as well as project management and consulting services.

**AF:** We have significant experience and expertise that extends

from managing large scale discovery and disclosure projects, to designing and implementing electronic trials.

**IDM:** How do you see NuLegal fitting within the evolving ediscovery landscape in Australia?

**AF:** The ediscovery landscape in Australia has already evolved significantly from the days of collecting electronic files, converting them all to Tiff or PDF and reviewing them one by one. The landscape is likely to change even further with the Australian Law Reform Commission currently reviewing the discovery laws in the Federal system including looking at ways 'to reduce the expense of discovery', 'ensure key documents relevant to the real issues in dispute are identified as early as possible', and reviewing 'the impact of technology on the discovery of documents'.

**MB:** NuLegal's focus will be on providing technology solutions that increase efficiency. This includes smart culling and sorting techniques (that result in less documents needing to be reviewed and the most relevant documents being reviewed first), as well as consulting services that small and mid-tier firms can draw upon to navigate the many legal and IT issues associated with discovery.

**IDM:** Are you pursuing any particular technology platforms or will you be taking advantage of emerging "cloud" capability?

**MB:** We have strategic partnerships with a number of leading technology vendors, including qCat for document delimiting and objective coding, and eDiscovery Tools for our electronic discovery solution. Cloud computing is something we will be keeping a keen eye on to see how it can benefit our clients. Saying that, there is still a lot of apprehension regarding the security and potential cross-border issues of this technology, and we will only use it where appropriate and with full disclosure to our clients. In terms of how it can be used in our industry, cloud technology being dynamically scalable, robust, accessible and cost effective, makes it a great candidate to handle large legal review projects that often have multiple lawyers spanning different cities, states or countries.

**IDM:** Is there an opportunity to provide consulting expertise to mid-tier firms that are looking to manage aspects of the ediscovery process directly to reduce legal costs?

**AF:** Definitely. Since the introduction of practice notes such as the Federal Court's CM 6 -Electronic Technology in Litigation, many small and mid-tier firms are now beginning to look more closely at the technology and processes involved in electronic discovery. In some cases, that extends to managing the process directly in-house. It is essential however, that they have the appropriate experience and expertise available. NuLegal can help by providing consulting services to assist with establishing an ediscovery team, or advising on a case by case basis.

**IDM:** Will you be able to assist organisations with all steps of the ediscovery process, or focus on particular areas?

**MB:** Our focus will initially be on the processing, review and production stages of the ediscovery process. As our company grows, we will consider moving into the computer forensics market but in the meantime we can certainly provide advice to assist law firms engage the appropriate experts or manage that process.



Anna Fry and Mark de Bruyn combine the twin disciplines of law and IT. Anna is a lawyer who practised in insurance and commercial litigation before beginning her career as a legal technology consultant with the Australian Government Solicitor in 2003. Mark has a technical background and has held a number of IT management roles in both the public and private sectors. More recently the pair worked together as Senior Analysts in the Evidence Services group at the Australian Securities and Investment Commission.



# The danger beyond

Mark Petty asks whether we are we doing enough to ensure that data is protected once it travels outside a firewall?

Today's business climate demands a better way to collaborate without compromising sensitive information, this is due to organisations increasing work globally, travelling less and partnering more. Companies can face significant risk when working with external parties; however businesses are unable to succeed without exchanging information. In order to effectively collaborate with external partners, customers and suppliers; organisations must allow sensitive documents to travel outside the firewall where they are no longer under their direct control.

Faced with demands for speed and efficiency, employees commonly fire off documents attached to emails. This, while enabling rapid exchange of information, substantially increases the risk of security breaches.

Once an email leaves the protection of the corporate firewall, nothing is in place to prevent accidental forwarding to unauthorised parties. Email is limited also by the size and number of documents that can be attached. Often IT policies are in place to limit attachment file size and the practicality of more than a few attachments is questionable.

Physically delivering documents, whether hardcopy or on electronic media, is possible; however couriering is prohibitively expensive and time consuming. These issues had been grappled with for years during the due diligence process of M&A transactions. At one time bidders were locked away and continually monitored in a physical room.

Since then, the introduction of virtual data rooms has moved this process online; bidders are provided with time-limited and restricted access to a central repository for documentation. A key component of these online data rooms is their high level of security, granular control over access and full auditing of actions.

## Efficiency

Security is not the only consideration for collaboration outside the firewall. Anyone who has collaborated on large documents using email can appreciate the difficulties that arise after a few revisions.

Emails are sent back and forth repeatedly between team members for review. As time goes on, there is complexity in working out what was changed by whom, when and why. Collaborative technologies like Microsoft SharePoint address this issue. They provide information sharing and document collaboration for the enterprise; speeding up information flow and increasing productivity.

They are easy and convenient for users, but are extremely difficult for companies to leverage for use with people outside the corporate firewall.

There are several Web 2.0 online collaborative tools that meet the demand for document sharing and collaboration. They are widely available and cheap, but are insecure and lack granularity over access and permissions. Tools like Secure Dataroom from e.law Asia Pacific, offers the best of both worlds; an online collaborative workspace that offers automatic document versioning, discussions, tasks and calendaring combined with the high level security found in virtual data room solutions for M&A Transactions.

Close attention to security should always be made when seeking an online workspace. The best online workspaces take advantage of technologies such as digital rights management and watermarking that extend beyond the collaborative space.

Documents and data should be strongly encrypted both in transit and in storage. Precise permissions and access controls should extend to the entire life of a document, from the time it is uploaded and shared to the time it is destroyed.

Protection from disclosing confidential documentation, exposing intellectual property and preventing information leaks should be a top concern for all businesses. Without proactive guidance, business users are unlikely to give serious attention to the security of documents they share with third parties.



Mark Petty is Head of Software Products at e.law Asia Pacific.



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## BlueCielo Downunder September 14, 2010

Edwin van Dijk, director product management at BlueCielo ECM Solutions, will be flying in from the Netherlands to present at the inaugural Onset Design Australian BlueCielo Conference, being held on September 14 2010 in Melbourne (venue details to be announced).

Hear local case studies and get more information about BlueCielo Meridian Enterprise & ProjectForce at the inaugural Onset Design Australian BlueCielo Conference.

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# EFIC's Web 2.0 makeover

SharePoint is often assumed to be strictly a collaboration platform, and not suitable for sophisticated public-facing web sites. This is a wrong assumption according to Australia's Export Finance and Insurance Corporation (EFIC), which is using SharePoint to completely rebrand its Internet presence.

Australia's export credit agency, (EFIC), operates under the umbrella of the Department of Foreign Affairs and Trade, and is responsible for helping eligible Australian exporters get the export finance or insurance they need to compete in the world market.

In 2009 the agency was given the challenge of a complete rebranding, including a redevelopment of its Internet and Intranet sites with a tight deadline of nine weeks for a Ministerial launch.

The agency was already using SharePoint 2007 as a document repository and without a huge budget or the time to consider new tools, elected to go ahead with the initiative within SharePoint. Melbourne's Sputnik Agency was engaged to coordinate the design and development, while Synergy Corporate Technologies was brought on board to provide SharePoint development expertise.

Jennifer Whittle, EFIC's Associate Director, Marketing Communications, said that collaboration was a major driver behind the intranet project, as all of the content had previously been channelled purely through the marketing team.

"We wanted to take it out of our hands and give all of the users

within EFIC the ability to update content," said Whittle.

"We needed distributed authoring which SharePoint was able to provide, but just because we were using SharePoint we did not want EFIC's brand identity to be compromised.

"People said you could not design a great looking Web site with SharePoint, but if you look at [www.efic.gov.au](http://www.efic.gov.au) we did not find that at all. We replaced a fairly staid, government looking Web site with something that is pleasant to look at, easy to navigate and provides straightforward access to tools to help people who are looking for finance."

Nicole Dixon, Chief Operating Officer of Sputnik Agency, said the site provides a great example of how SharePoint can be implemented to support a complex user experience and design in line with government and industry standards.

"Our main challenge was speed to market," said Dixon.

"We had a very detailed strategy and a tight timeline to launch. This required real collaboration and clever use of hosted environments to fast track deployments, testing and edits. It

(l to r) Pictured after presenting a session at the Australia SharePoint 2010 Conference. Synergy Principal Milan Gross, EFIC's Associate Director, Marketing Communications, Jennifer Whittle, and Nicole Dixon, Chief Operating Officer of Sputnik Agency.



also required us to facilitate many stakeholders and a geographically distributed implementation team.”

The intranet site integrates with EFIC’s Saleslogix CRM system and the Web site employs Google Analytics and Eyeblaster AdServing Technology.

Sputnik began the design process by developing “mood boards” in Photoshop to establish the colour scheme and fonts for the site, then developed wireframes of the navigation structure and relationships between pages.

It aimed to add an emotional message to the often detailed and technical content through typography, images and layout.

“We didn’t compromise a single thing for SharePoint, whether it was styling, SEO or page design,” said Dixon.

With a tight deadline and a strict creative brief, the project was also undertaken with a mission to employ as much out-of-the-box SharePoint functionality as possible. Dixon estimates that around 80% of the development task was able to be accomplished natively within SharePoint.

The approved Photoshop designs were converted into HTML mock-ups then delivered to Synergy Corporate Technologies with accompanying CSS styles.

Synergy Principal Milan Gross said the development process began with melding these HTML mock-ups into a custom SharePoint Master Page.

“We used alternate page layouts and custom CSS to render the unique styling of the site. The ability to leverage built-in functionality of SharePoint such as Data View Web Parts and Reusable Content was invaluable.

“The site looks nothing like a SharePoint site.”

Microsoft’s SharePoint Designer was used extensively for development and user acceptance testing, then subsequent edits and amendments to page designs. This enabled rapid turnaround of design changes and updates, while a central ticketing tool enabled the distributed team to collaborate on issues.

The highly-styled custom navigation was a big challenge for the team, and something that could not be encompassed within out-of-the-box SharePoint.

Synergy turned to custom development for the complex flyout menus and created a custom .Net control to generate the menus based on visitor interaction. The custom navigation control dynamically generates HTML tags and CSS classes based on the site and page taxonomy stored in SharePoint.

To support visitor information requests and contact enquiries, Synergy developed several custom .Net web forms that store the posted data in SharePoint lists for easy search and retrieval by EFIC staff.

As a federal government agency, compliance was an important



EFIC is pleased with the results of its SharePoint initiative, which has delivered a digital CMS platform that supports [www.efic.gov.au](http://www.efic.gov.au) (above) and [www.exportfinance.gov.au](http://www.exportfinance.gov.au) (below).



aspect of design and development. The EFIC site meets WCAG 2.0 standards and industry best practice for contrast, browser support, text only version, etc.

The previous EFIC was ranked poorly for search engine optimisation (SEO) and the inability to regularly edit and optimise content was a key issue.

SEO for the new site was designed at three levels with a custom metatag control that populates the keywords and descriptions for each page based on a set of global keywords for the site and page keywords that are defined in the page metadata.

“The new Web site launched within a very aggressive timeframe with a well-branded and rich design,” said Whittle.

“We have significantly improved our SEO and we have leveraged the project for two additional SharePoint solutions.

“The intranet site has provided a positive change for collaboration within EFIC. All areas of the business are now engaged and empowered to participate in our digital strategy and assist as communicators.”





# A road well travelled

## VicRoads is in the driver's seat with a major rollout of the eDocs EDRMS platform to more than 2500 employees across the state.

After the successful conclusion of a EDRMS pilot in 2009, VicRoads awarded an \$A1.8 million contract to WindowLogic to implement and support the eDocs document management system.

Tony Ljaskevic, VicRoads' Program Manager, Information Management & Technology, said the staggered rollout was progressing successfully and is now up to the 850 user mark, with around 30 to 40 new staff being added each week.

"There have been many examples of disastrous EDRMS implementations where an executive decides on Friday to roll it out to everyone on the following Monday," said Ljaskevic, who completed a Masters of Information Management at Monash University.

"My experience pointed to a staggered approach, so when we roll this out to a business area we spend four to five weeks engaging them and getting their input with regard to the file plan, picking a few champions to train as expert users over a few weeks and engaging them to continue tidying up the file plan for their area. Only then do we train the end users.

"It's a long lead time but you just can't dump this on people in a day. We find that about six hours of training is adequate. The system is quite easy to use but they need to contextualise how they save documents in their role within their given business area.

"We have three people providing this training, one external trainer, a member of the project team who explains the importance of the project and why the organisation is doing it, plus an advanced user who has already had the training, and understand the file plan in that business area. We've found that mix works quite effectively."

VicRoads is implementing the EDRMS to solve the problem of capturing documents and emails created on the desktop and providing more structure for this data. The Standard Operating Environment is Windows XP, Office 2003, and Lotus Notes email.

A separate project is underway to upgrade VicRoads' core transactional application for licence and registration processing.

Much of VicRoads' transactions are paper-based, as forms are provided as PDFs on the VicRoads' Web site to be downloaded, printed and submitted by fax or post. There are a number of links to police and other government agencies in Victoria and around Australia where data is transferred and shared electronically either in realtime or via batch processing. The scope of the EDRMS is confined to managing documents and records created on the

desktop. Many of VicRoads' 2500 employees are dealing with the public at the front counter, where they are processing applications and inputting data directly into transactional systems using purpose-built dedicated applications.

"We also have a large number of administrative staff creating reports, emails, spreadsheets in Office applications which may or may not be saved in a structured readily accessible format."

### Project scope

"The scope of the EDMRS project was to tackle that element that was previously handled by distributed network drives," said Ljaskevic.

"Each office had their own drive where everything was stored on a file server locally, and each office would have their own naming and filing conventions, albeit loosely following some corporate conventions. We couldn't search and share each other's documents all that easily which meant people would resort to emailing documents internally. Instead of many decentralised unstructured repositories, the goal of the EDRMS is to provide a centralised bucket, with an agreed filing structure which captures all of the business function and activities wherever staff are located in what we've branded as our "QuickDocs" platform.

"Having done this before, I am aware that it can't be too onerous or people will shy away from it. Previously when a staff member saved an item on a shared drive, it didn't necessarily capture their business area, their name, position and physical



VicRoads' Tony Ljaskevic is an IT Program Manager who has been responsible for leading and implementing several EDRMS and web related initiatives across the Victorian Government.



location. That organisational data is now automatically appended so we can search for documents based on these criteria.

"We automate as much of the metadata collection as possible, although there will always be some human intervention required."

The majority of staff may eventually have no option but to save documents in QuickDocs, although some business areas have differing requirements. For instance the engineering division uses a dedicated document management system from Bentley. It will continue using that system.

Once a multi-layered engineering drawing for a project is finalised it will be saved as a PDF into QuickDocs and that will become the authoritative source.

The eDocs platform will accept 200 different file formats, and the file plan will allow users to browse a whole range of different content that is stored, for instance, under a particular traffic intersection.

In the case of one notorious road intersection blackspot, the folder contains an engineering drawing, an imaged complaint letter from motorist, jpg pictures of the intersection, email from Lotus Notes with Word documents attached, and a WAV file of a recorded radio interview conducted by the Minister for Transport.

"Anyone who wanted to know what had gone on in relation to that particular intersection could open that folder and get the full picture, whereas previously that would have been distributed and hard to compile," said Ljaskevic.

"We are also beginning to merge some of our financials into QuickDocs so that invoices and purchase orders are saved into the repository. More and more people are seeing the benefits of not

having to attach physical documents to their database any more, they are able to attach an HTML reference which is a pointer to the QuickDocs document and ensures you always have the latest version."

VicRoads has also elected to link the metadata to the official Victorian road names database, which is helping to bring in a level of standardisation and solve the problems that arrive from the fact that people colloquially refer to roads by a number different names. Dandenong Road, for instance, is also known in sections as the Princess Freeway.

Before this database integration was completed, if a particular road was referred to by more than one name, all three versions would have to be appended to the document as metadata, whereas now, a link to the official road names database provides consistency to file names and documents.

Other data, such as property IDs, geospatial references or asset IDs, is also appended to documents in metadata to provide for more efficient search.

Implementation challenges including linking to external databases within the organisation and ensuring they were appropriately maintained and updated

"In some cases we were providing staff with access to internal databases.

"They had not been able to view before the rollout of the centralised EDRMS, and they were able to question the data which in effect allowed our staff to do some of our data cleansing for us," said Ljaskevic.



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# Constructing a digital future

Steve Brant outlines how collaboration technology is being used to overcome inefficient data management in the construction industry

The construction industry is one of the most paper heavy of industries. On a typical mid-sized commercial or infrastructure project, hundreds of thousands of drawings, documents and correspondence items will be exchanged between a network of builders, project managers, architects, engineers and subcontractors.

Whether building an apartment block or office tower, a highway or power station, this flow of information is the lifeblood of the project. The fragmented nature of the industry makes timely, accurate exchange of data central to a project's success.

If a builder doesn't receive a drawing on time, or is sent the wrong version, what happens? Delays, disputes, expensive reworks, and even the possibility of legal action - all in all, a heavy price to pay for inefficient document management.

Since information management is such an integral part of a construction project, you'd assume that the industry would be at the forefront of adopting the latest tools and technologies to manage their data. However, this is not always the case. The vast majority of construction projects still use a combination of paper documents, fax, email and in-house systems to manage project information.

These tools are relatively adequate in a single enterprise environment, when only dealing with internal team members; however they are completely insufficient for the collaborative, multi-organisation environment of a project. The common outcome is that companies become information silos, where project members can neither find what they need, nor share what they have.

As well as slowing down the flow of information, this can also lead to crucial data not being captured, as well as miscommunication between team members. Of more concern, in these litigious times, is that these tools often provide no audit trail of what's been committed to and agreed. All of this reduces project efficiency and increases firms' exposure to risk.

## Moving the industry online

This largely explains why uptake of project collaboration systems has increased so rapidly over the past few years - on average doubling over the past five years. These secure, web-based systems - which are independent of any one project participant - allow all project members (the architect, builder, subcontractor, etc.) to access, distribute, track and store their documents and correspondence using a single, common platform.

At any time and from any location, project members can instantly access exactly what they need, using a secure login. Documents stored on the system can be transmitted to other project members and then the status of reviews and approvals can be tracked.

What can this mean in practice? For a start, for construction firms there are no more expensive print bills, no more waiting for drawings to reach other parties, no more time wasted searching for files, and no more lost documents. The time and bottom-line savings can be significant. As an example, the main contractor on a large-scale commercial project recently reported that they saved \$550,000 in print costs by using a collaboration system, and also cut document review times by 15%.

Although these figures are impressive, companies often find that the most significant benefit of using a collaboration system is something more long-term and less tangible: risk reduction.

With collaboration systems, all data is securely archived and cannot be deleted or accessed by unauthorised personnel. Throughout a project, the systems maintain an audit trail of 'who did what and when' to provide transparency and accountability. Changes to drawings and other documents are clearly tracked and



dated so that there is always a clear, single version of the truth. To identify bottlenecks, project managers can instantly view reports of overdue items - again reducing the possibility of disputes and delays.

Most importantly, collaboration systems hold project information on a neutral, independent platform. This creates a level playing field where no party has more control over the other. This, as much as anything, drives adoption and usage, and supports open collaboration between companies.

Steve Brant is General Manager Australia at Aconex, the world's largest provider of online project collaboration solutions to the construction and engineering industries.





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## bizhub adds fax over IP



A new enterprise IP fax software solution for Konica Minolta's bizhub Multi-Function Devices (MFDs) provides access to fax services on the same device used for printing, scanning and copying.

Jointly developed with MESSAGEmanager Solutions, the Konica Minolta Fax Connector consolidates all fax services within an enterprise.

MESSAGEmanager IP Fax software enables users of MFDs, email, desktop, CRM and ERP applications to send and receive facsimiles over IP networks. It also integrates with popular IP Telephony systems and runs in a virtual environment.

The Konica Minolta Fax Connector provides a simple solution for organisations to centralise fax administration and drastically reduce communication costs.

The Fax Connector, developed jointly by MESSAGEmanager Solutions and Konica Minolta, logs and archives all sent and received messages in a SQL database and protects sensitive information by delivering incoming faxes directly to user's mailboxes.

## ABBYY ships Recognition Server 3

ABBYY has added batch scanning, efficient indexing, and intelligent output handling to the latest version of its solution for document capture and optical character recognition (OCR).

ABBYY Recognition Server 3.0 is a server-based solution for automating document processing in enterprise and service-based environments. Version 3.0 is designed to automatically convert large volumes of paper documents or document images into fully searchable electronic text, suitable for business processes such as document archiving, e-discovery and enterprise search.

Recognition Server enables automated, unattended processing which can be centrally managed and accessed from multiple points within the organisation or remotely. Recognition Server can also connect with a variety of back-end systems and third-party applications with integration via Scripts, XML tickets, a Web-service API, or a COM-based API. ABBYY intelligent OCR and PDF conversion technology delivers highly accurate document conversion with recognition of up to 190 languages.

New Recognition Server functionality is delivered through the addition of two new "stations" to the Recognition Server package. A new Scanning Station extends Recognition Server's capabilities beyond simple "back-end" processing to add support for capture of documents. Recognition Server's new Indexing Station provides a simple, efficient way to manually extract key data from a document for quick and easy indexing and cataloguing of document metadata.

The new Scanning Station supports high-speed batch scanning of paper documents via TWAIN, WIA, and ISIS drivers. Enhanced scripting functionality enables administrators to create flexible rules for document separation. For example, documents can be

separated by a certain word, phrase or a set of barcode values found on a page.

By analyzing the structure and content of documents according to the pre-defined rules, the system can also perform document type detection and key indexing automatically. In addition, the new Indexing Station makes it easy for operators to specify document attributes and pull key data out of recognized text on a document. With its "point-and-click" indexing, operators simply use the mouse to outline the area on a page that contains the key data, e.g. invoice number, fax recipient's name, applicant's name, etc.

Once the general processing is complete, output documents and their attributes can be routed to the next workflow stage or to final storage by an export handling script. A separate export handling script can be set up for working with failed jobs.

ABBYY Recognition Server 3.0 is compatible with Google Search Appliance, SharePoint Server and Windows Search via connectors available as Add-on modules. When using Recognition Server together with enterprise search systems, image-based documents such as faxes, scanned agreements, contracts, correspondence, and any other TIFF, JPEG or PDF files can be easily converted into fully searchable data for easy access by enterprise search tools.

## ClearView on the enterprise

ADERANT, a global provider of business, financial, and information management software for law and professional services firms, has announced the introduction of a new Microsoft SharePoint-based application for consolidated information access, Expert ClearView.

It provides partners, practice group leaders, professionals, CFOs, and other personnel with a consolidated view of both operational data and performance information, allowing them to improve decision making.

The application tailors data to the needs of users based on their roles and presents it to them via interactive Microsoft SharePoint dashboards.

Rather than requiring users to look through voluminous—and often dated—reports for crucial data, or launch multiple applications to track down one piece of information, Expert ClearView provides users with a single, customisable Microsoft SharePoint dashboard that contains all the information relevant to their role.

The pre-defined, role-based dashboards combine operational data and inquiries with analytical and performance information. Partners and finance executives gain access to performance information, such as trends and profitability analysis, which helps them quickly understand how their business is performing, and if any aspect of their operations needs attention or improvement.

## Business card scan combo

Ambir Technology has released a software and scanner combination that scans data from business cards and stores it in a searchable database.

TravelScan Pro ME uses a powerful OCR engine that takes contact information, like phone number and address, and stores it in separate editable fields. This information can be synchronised with Microsoft Outlook, Outlook Express, Windows Mail, Lotus Notes, ACT!, Palm Computing Platform, or Windows Mobile devices. Data files can also be exported in CSV or vCard format.

The TravelScan Pro ME also includes AmbirScan and PageManager 7 software. This software allows the scanner to act as a document scanner as well as a business card scanner. The AmbirScan image scanning software supports PDF, JPEG and TIFF file formats and media sizes from business cards up to legal-sized documents. PageManager 7 is a document management program that includes drag and drop file management, a preview mode and the ability to convert files into PDF format.

This scanner is TWAIN and WIA compliant and the TravelScan Pro ME costs \$US209.95.

## Blu-ray climbs toward 128GB

The Blu-ray Disc Association (BDA) has announced specifications for BDXL, the new multi-layer recordable Blu-ray Disc format with up to 128GB of capacity.

Targeted primarily at commercial segments such as broadcasting, medical and document imaging enterprises with significant archiving needs, BDXL provides customers with triple layer 100GB RE (rewritable) and R (write-once) discs and quadruple layer 128GB R discs. Possible consumer applications include capture and playback of HD broadcast and satellite programming in markets where set-top recorders are prevalent.

The BDXL specification was developed with specific market segments in mind, and newly-designed hardware addressing such markets will playback or record only BDXL media.

However, because the new media specifications are extensions of current Blu-ray Disc technologies, future BDXL capable recorders will be able to playback existing 25GB and 50GB Blu-ray Disc formats.

## Antivirus for SharePoint

Powered by Trend Micro, DocAve Antivirus for SharePoint is a new anti-malware option that enables realtime, event-based scanning to ensure malware is identified and quarantined before it reaches the SQL database. For organisations already utilising Symantec Scan Engine, AvePoint offers a version optimised for Symantec engines as well. DocAve Antivirus protects SharePoint platforms from viruses, worms, rootkits, and Trojan horses. The company says most organisations don't realise that the great majority of email and enterprise-level antivirus solutions on the market today do not properly and proactively protect content residing within SharePoint, leaving companies susceptible to security breaches and a crippling loss of productivity.

DocAve Antivirus is one of several DocAve solutions devoted to ensuring SharePoint environments receive comprehensive protection. DocAve Content Shield for SharePoint scans all content before it is uploaded into SharePoint, verifies it against customisable keywords, phrases, and patterns, and quarantines any data that does not meet the organisation's compliance standards.

## SharePoint search alternative

BA-Insight has released its next generation search solution for SharePoint, Longitude V4 for Microsoft SharePoint and FAST Search 2010.

Longitude V4 provides a rich Silverlight Viewer which the company claims is superior to Flash/Java in speed of rendition.

It offers out-of-the-box connectors to more than 30 business systems and the company estimates that organisations deploying Longitude experience full integration of enterprise data within days, instead of the months that are typically devoted to enterprise information access initiatives.

Longitude V4 provides linking of structured and unstructured data, text recognition within an image format, where OCR is executed on the fly, indexing of email including attachments and Parametric search

## Basware hosted e-invoicing

Basware has announced the addition of supplier functionality to its Basware Connectivity services, offering accounts receivable (AR) departments in Australia and New Zealand a hosted solution to switching to fully electronic invoices.

Basware Connectivity for Suppliers enables Accounts Receivable (AR) departments to deliver all sales invoices to their customers electronically, irrespective of the invoice format required by the customer organisation.

The service processes the invoice in an electronic format and routes them to the customers' invoicing processing systems, e-mail addresses or a printing service, depending on the recipient's choice.



Once invoices are delivered, they are archived to guarantee integrity, enabling future compliance where there are legal requirements for storing e-invoices.

According to independent research company Billentis, organisations can save as much as 57% per invoice in costs by turning their sales invoices electronic.

## Claromentis adds audit suite

Claromentis is addressing information and audit management with a new integrated web based suite. It can manage the deployment of policies and procedures through a professional ratification and consultancy process, and making them available to relevant stakeholders.

It also handles the management of audits – internal and external, with appropriate question sets for all legislation. Non-conformance and observations can be identified, assigned, resolved and verified.

To meet the imperatives of ISO9001:2008 and ISO14001:2004 the software provides three integrated applications:

- Policy Manager – Manages policies and procedures as application files;
- Policy Publisher – For larger companies a complete online solution including auto-updating of interrelated information; and
- Audit Manager – To schedule all audits across all sites, for any appropriate legislation, and to manage all associated observations and non-conformance.

The solution is customisable and allows for multiple business unit branding, with automatic updating of content as underlying policies are changed by subject matter experts.

## Compuware ChangePoint 2010

Compuware has launched a major release of its project portfolio management (PPM) and professional services automation solution. ChangePoint 2010 offers new support for mobile devices such as the Blackberry and iPhone while also providing enhanced support for team collaboration.

The new mobile support enables remote functionality such as time entry, the ability to access and update assigned tasks and participate in workflow-driven approval cycles.

The 2010 release now offers an embedded screen capture utility to enable better analysis and faster resolution of support issues. It also delivers enhanced support for templates associated with specific request-based business objectives.

ChangePoint's team folders facilitate collaboration between distributed, cross-functional technology teams including customers, sub-contractors and industry partners. In the 2010 release,

ChangePoint makes team participation more dynamic by making team folders more universally accessible to all ChangePoint users, including third-party users via client portals.



## Business process out of the box



Knowledgeone Corporation (K1Corp) has released a new suite of tools designed to simplify the challenge for organisations offering business processing services and solutions.

The toolkit is designed to allow business process outsourcing (BPO) companies the ability to develop tailored solutions for their clients without programming.

The BPM toolset can be used by both BPO providers or client organisations directly in order to optimise most business processes, e.g. customer requests, purchasing, accounts payable, accounts receivable, HR processes, loan document (packet) management, etc. The new suite is based on the company's RecFind 6 product suite, and is the result of five calendar years of research and development by K1Corp at its North Sydney Development Centre.

Based on Microsoft .NET technology and tools, the new K1Corp BPM suite has already been used by one vendor to win a major new document-centric BPM contract within the NSW government, and has been proposed for many other opportunities in both the government and private sectors, according to the company.

The whole suite was designed using Service Oriented Architecture (SOA) and components share a common API and communicate with the back-end database via a common security system. A single user/access security configuration governs all components regardless of how they communicate with the database.

## DocAuto iImport Desktop 1.0

DocAuto has announced the release of a new add-in to iManage DeskSite or FileSite that allows users to quickly and easily import content, preserving organisational structures if desired, from native operating system folders and subfolders directly into WorkSite.

The iImport Desktop program features an easy-to-use Windows Explorer-like interface that is simple and intuitive.

With iImport Desktop, users can extend the native FileSite/DeskSite import capabilities on their workstations to import multiple documents or entire folder structures at once. The product includes document filtering capabilities, and the ability for administrators to limit where content can be imported.

For example, eligible "targets" for import operations can be restricted to WorkSpace-centric locations, such as WorkSpaces, Tabs, or WorkSpace Folders, or expanded to include non-WorkSpace centric locations, such as the root of a WorkSite database, or "legacy" Folder structures.

## FileBound Express on track

FileBound Australia has announced the launch of its all-in-one document management appliance, FileBound Express.

There are no monthly fees or per document charges, and FileBound Express can be connected to an unlimited number of users and store up to two million documents of any type.

There is a full document workflow option for businesses that

wish to implement document automation capabilities. The solution includes hardware, scanning software, a database and the Windows operating system, with setup promised to take just a few minutes once the appliance is plugged into a network.

Seamless integration with third party software such as Microsoft Office, QuickBooks and other applications is also offered.

A business initially sets up on FileBound Express with the on-screen set-up wizard after using the electronic files, folders, dividers and cabinets and finding a document, filing a document or circulating an item is a matter of a couple of clicks. There's no limit to the number of cabinets, folders and dividers a company can set up in their FileBound Express system. The system allows management to determine access to information, so it is easy to keep sensitive or proprietary information secure.

## Waving a wand over XBRL

Fujitsu has announced the latest release of the eXtensible Business Reporting Language (XBRL) software Interstage XWand Version 11, designed to help companies increase automation, transparency and governance around financial activities.

XBRL, an international business reporting language, is the foundation of the Australian Government's standard business reporting (SBR) program. XBRL is also used by regulators around the world including the Securities and Exchange Commission (SEC) in the U.S., Her Majesty's Revenue and Customs Service in the U.K. and The Tokyo Stock Exchange in Japan.

"We realised from our experience in projects overseas that software developers do not necessarily want to become XBRL experts. Rather they want to be able to incorporate XBRL into their products in an easy way and focus on the key business related functions of their applications," said Peter Campbell, Principal Architect in Fujitsu's XBRL team.

"In conjunction with SBR, we developed an Application Programming Interface (API) which embedded (and hid) all the rules used in the SBR XBRL taxonomies allowing developers to XBRL enable their applications in the simplest possible way."

This API has now been made available for use by all commercial software vendors involved in the Australian SBR program.

With support for tagging in Microsoft Word, and the ability to extend and customise in-house validation of reports before submission, the newest release of Interstage XWand allows clients to quickly and cost effectively adhere to the latest financial regulations.

## Harmonie talks to SharePoint

Mainsoft has announced Microsoft Office 2010 integration for its Harmonie product, a free Outlook sidebar that provides access to SharePoint and Google Docs from within email.

One example of this integration is that business personnel can now "drag, drop and share" documents from Outlook 2010's new People Pane to SharePoint.

The "People Pane" enables users to easily access messages and documents exchanged with specific colleagues; Harmonie makes it easy to share this information with groups by simply dragging and dropping documents directly from the pane into SharePoint.

In turn, documents residing within individual people panes can now be easily shared by groups in a centralised location.

The Harmonie sidebar promotes the social aspects of collaborating on documents - enabling people to share a single, centralised copy of the document, eliminating the many intermediary steps associated with sending email attachments back and forth.

Harmonie provides immediate access to documents within SharePoint or Google Docs, directly within the Outlook client; providing one centralised location for document sharing.

The new integration is currently available in Harmonie for Google Docs. The new integration will be available for Harmonie for SharePoint in August.

## BlueCoat unwraps DLP appliance



Blue Coat Systems claims to have cracked the nut of simple Data Loss Prevention (DLP) with a new appliance that combines with its hybrid Secure Web Gateway solution to protect against both inbound malicious threats and outbound data loss.

The Blue Coat DLP appliances integrate data loss protection for traffic on the network, including email and Web content, and data at rest in databases or on servers (the two capabilities are licensed separately), with a unified management system in a single, integrated platform.

Blue Coat claims its DLP appliances can typically be operational in one day or less, including installation and configuration; policy definition and content fingerprinting; initial monitoring and inspection of traffic; and incident analysis. In contrast, it says traditional DLP solutions require weeks, and even months, to deploy and reach full operation.

In addition to simplifying deployment and operation, the Blue Coat DLP appliance also provides a number of advanced data loss prevention technologies, including:

- \* Advanced Fingerprinting to assess structured and unstructured data with fewer false positives.

- \* Support for most common languages, including those that require multi-byte characters.

- \* Support for over 600 document types.

Blue Coat has previously sold other DLP solutions from vendors such as Vontu (now owned by Symantec), McAfee and RSA, and will still supply these in tandem with its Web Gateway where required. Blue Coat DLP appliances are available now in three models that support up to 250, 5,000 and 20,000 users, respectively. List prices start at A\$14,300 ex GST and NZ\$17,400 ex GST at current exchange rates.

## Securing unstructured data

Imperva has extended its SecureSphere Data Security Suite to look beyond databases and provide an appliance to prevent and log unauthorised access to unstructured data residing on file servers and network attached storage (NAS).

SecureSphere File Activity Monitoring (FAM) allows organisations to monitor access to sensitive file data, establish an audit trail for compliance and reduce data access rights to a business need-to-know level.

The solution protects file systems that do not natively have the capacity to log who has access to information and keep a trail for audit or forensic purposes.

Pricing starts at \$US30,000 for a platform that works by monitoring traffic through a network switch and keeping track of user requests to view or download data network storage.

Companies can aggregate, review, approve or reject rights to sensitive files/folders; and audit, alert, and block access to sensitive files/folders. It is sold separately or as part of a single platform that can be used to secure both structured and unstructured data.

## Migrate wikis to SharePoint

Metalogix has unveiled a tool to migrate content from popular blog and wiki platforms to SharePoint.

Migration Manager takes content from Blogger, WordPress, Telligent, Confluence and Wikimedia to Office SharePoint Server 2007 and SharePoint 2010.

"Many organisations are keen to leverage the social computing capabilities of SharePoint 2010. The ability to deploy scalable blogs and wikis with a common authoring and search experience is very valuable," said Jeremy Thake, SharePoint Evangelist.

"With Metalogix Migration Manager for Blogs and Wikis, organizations can transition their valuable content from popular wiki platforms like MediaWiki and Confluence and dramatically reduce their migration effort and cost."

The Metalogix solution migrates content from any blogging solution that supports the Metaweblog API, RSS or ATOM. It preserves blog posts, comments, and categories and maps users. When migrating content from wikis, it preserves all posts, comments, metadata and attachments.

SharePoint administrators can perform migration activities remotely, from any client machine, and run batch migration operations at any time. Migration is performed through supported remote Blog and Wiki APIs to assure compliance and data integrity.

## SharePoint Metadata Security

Titus Labs has updated Metadata Security for SharePoint to include support for SharePoint 2010.

The solution enables administrators to protect any document type or item, and restrict access in SharePoint, based on metadata properties or SharePoint content types. Metadata Security for SharePoint automates the process of creating item level security permissions for sensitive information.

It allows permissions to be assigned to users or groups based on their Active Directory properties, and provides the ability to read user and group names from columns and populate them in item permissions, making it much easier to manage permissions for specific people or groups.

## Scale-out grows up with Isilon

Isilon has announced the sixth generation of its OneFS scale-out storage operating system, and two new data management software applications, SmartPools and InsightIQ.

SmartPools enables users to unify multiple Isilon storage performance tiers into a single file system, providing simplified data management and automated data movement.

Using SmartPools in combination with InsightIQ, Isilon's new storage analytics application, administrators can optimise workflow performance by closely aligning application demands with storage resources; improving resource utilisation and reducing both capital and operating expenses.

Isilon's SmartPools data management application creates a single file system and single point of management for all storage tiers, automatically aligning application needs with performance, capacity, and cost to drive increased simplicity and efficiency across enterprise IT operations.

With SmartPools, users can consolidate a wide range of applications onto a single storage resource, eliminating the need for manual data migration between multiple systems and accelerating data access for mission-critical business processes, while reducing storage costs and management.

Isilon's OneFS 6.0 operating system, SmartPools data management application and InsightIQ system analytics application are all available beginning July 30th. OneFS 6.0 will be available as an upgrade for existing customers, and will be standard with all new Isilon system purchases. SmartPools is listed at \$3,950-\$9,950 per node, depending on node model. InsightIQ is listed at \$1,950-\$3,850 per node, depending on node model.

# Australia SharePoint Conference to make early return in 2011

The Australia SharePoint Conference & Exhibition will be back from March 8-9 2011, after a successful inaugural event at the Sydney Hilton from June 16-17 2010 was attended by more than 600 business and technical professionals from across the country. Microsoft's Arpan Shah, Director of the SharePoint Technical Product Management team, flew in from Redmond to open the event before a packed house.

Shah provided a detailed walkthrough of the new capabilities of SharePoint 2010, including the enhanced records management capabilities, and its new focus on providing out of the box functionality for public-facing Internet sites as well as collaborative intranet workspaces.

Said Shah, "Microsoft's strategy is to offer near end-user feature parity for SharePoint 2010 whether as a hosted or on-premise deployment."

According to Ireland, one major drawcard for attendees was the Voice of the Customer sessions that provided presentations of customer implementations (Sessions profiled in this edition of IDM include Commonwealth Bank Australia p14, HomeStart Australia p24 and EFIC p38).

Said Ireland, "The fact that so many people are registering to hear how other organisations are using SharePoint to deliver major technology and business benefits tells us that SharePoint, be it 2007 or 2010, is about the hottest tech topic around today."

Meghan Kemp, conference attendee and Sydney-based Document Controller/SharePoint Administrator at White Energy company, attended the event to assist with determining company requirements in relation to document record keeping, enterprise content management and an intranet portal.

"It was one of the best IT conferences and most useful and applicable seminar I have ever been to since I have been working in IT, document automation and legal firms' in business systems management.

"It was inspiring, the presenters were well informed and passionate about their subjects and the general level of the conference was professional and the different "tracks" were all applicable," said Kemp.



Conference Convener Debbie Ireland (pictured at right with fellow organiser Mark Orange) said there was overwhelming support from conference attendees and exhibitors for the new industry event. Almost 20% of the attendees came from the government sector. Conference attendees were split 50/50 between those attending business and technology sessions. Ireland is also proud of the strong female presence, as over 25% of the attendees were women, not typical of a technically focussed event.

## People On The Move

Purchase-to-pay software leader **Basware** has announced the appointment of **Karri Lehtonen** to the role of Vice President of Basware in Australia and New Zealand. Prior to this position, Lehtonen was the Head of Basware's Legal Department and Vice President for Corporate Mergers and Acquisitions (M&A) where he was responsible for the M&A operations of Basware globally. Lehtonen has eight years experience working across virtually all aspects of Basware's business in Europe.

**FileBound Australia** has announced the appointment of **Luke Bartlett**, formerly Director of Client Services at the SEMA Group, to its Board of Directors. Bartlett has come from a background of IT Start-ups, Innovation Development, Digitisation, Customer Experience and Sales Force Automation.

**WindowLogic**, a leading Australian provider of document management software and custom applications, has expanded its Sydney office based in Pyrmont with the appointment of four senior consultants who will hold responsibility for handling new business development, account management and overall solutions delivery. **Paul Wyatt** joins WindowLogic as Sales Manager – Eastern Seaboard with responsibility for customer account management, new business development and partner relationships in the eastern states.

**Wolfgang Reh** joins WindowLogic as Senior Consultant and was previously a Senior Implementation Consultant at Alphawest. During his three years with the organisation he was responsible for project delivery within the professional services sector and the development of a range of complimentary iManage modules. **Stanford Luk** has been appointed Senior Consultant with responsibility for client solutions delivery. Luk was previously a consultant at Alphawest where he specialised in providing solutions based on the Interwoven platform.

**Darren Conway** joins WindowLogic as Senior Consultant and has more than seven years' experience in Autonomy iManage deployments. Prior to joining WindowLogic, he was a Senior Autonomy iManage Consultant at Alphawest and has also worked at Autonomy iManage as Consultant.

## EVENT DIARY

### InForum Convention

5-8 September 2010  
Gold Coast Convention Centre  
Broadbeach, QLD  
Records Management Association of Australasia (RMAA) Annual Conference & Exhibition.  
<http://inforum.net.au/>

### Stephen Few: Visual Business Intelligence Workshop

23-25 November 2010  
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email: [training@altis.com.au](mailto:training@altis.com.au)

### KM Asia 2010

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