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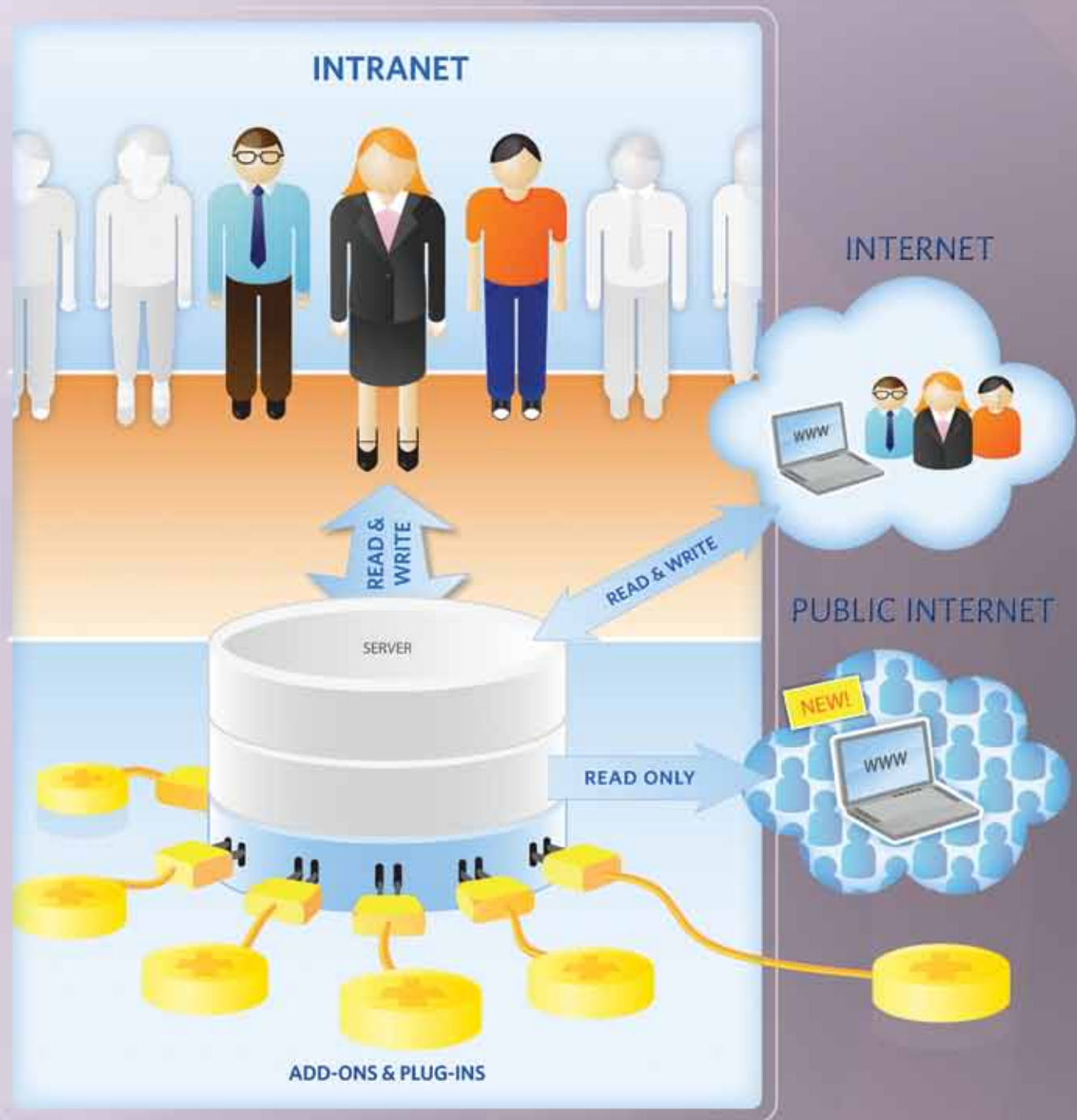
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DOCUMENT MANAGEMENT

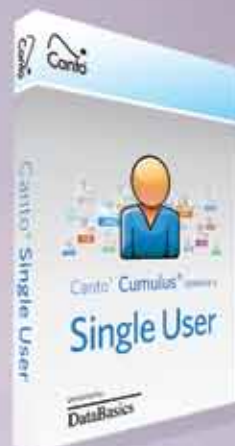
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Aussie workers fired up by info rage says LexisNexis survey

Almost half of Australian professionals are feeling demoralised from a data overload that threatens both work practices and output, potentially leading to 'information rage,' according to a global study by workflow solutions specialist LexisNexis.

The survey of 1,700 white collar workers found that, 49% of professionals report feeling dejected and frustrated at being unable to manage all the information that comes their way at work and said that if the amount of information they receive continues to increase, over half (51%) would soon reach a 'breaking point' where they can't handle any more.

The report also found that, of the countries surveyed (Australia, the United States, China, South Africa, United Kingdom), Australian workers are the most likely to admit that the amount of information they have to manage for their jobs has increased in the past five years (92%), with two-thirds (65%) saying the amount of information increased significantly.

Compared to the other markets surveyed, Australians spend more time receiving and managing information (54%) than actually using that information (46%).

Marc K. Peter, Director of Technology and Business Development at LexisNexis Pacific, said while it was widely accepted the amount of information Australians deal with is increasing, this recent survey indicates the inundation of information is taking a heavy psychological toll on Australian workers.

"Australian workers are finding that the Information Age is causing 'information rage,'" said Mr. Peter. "We see 'information rage' as being driven by three things: a surfeit of information, the lack of relevance of the majority of that information, and the inability of organisational systems to deal with the information well," said Mr. Peter.

The research also found:

- 50% of Australian professionals say that on average, only about half of the information that comes their way every day at work is actually important to them getting their job done.
 - In Australia, only 40% of email received is important to getting a worker's job done – the lowest of any country polled.
 - 88% of Australian workers wish they could spend less time organising, and more time using, the information that comes their way.
 - Although nearly all Australian workers (97%) believe that they are effective at prioritising the information that comes their way at work to access the most valuable materials, 70% admit that the quality of their work suffers at times because they can't sort through the information that they need fast enough.
 - 58% of Australian workers have disagreements among colleagues about the right way to organise information at least once in an average week, and 48% have delivered incomplete documents, email or other communications because they could not find the necessary information in time.
 - Only one in five (22%) Australian professionals responded that their company has offered training in information management in the past two years, despite 60% wanting their companies to do so.
- "As a nation, we are seeing the increasing need to manage and process more and more information in our day to day working lives, and this requirement is adding to not only to the personal stress of our workers but is also impacting on both the quality and quantity of the work created", continued Mr. Peter.
- "From the figures, we can assume Australians are effectively spending less than two-and-a-half days a week actually doing their job and the rest of the time trawling through e-mails and other information, over half of which do not have direct relevance to their day-to-day priorities."
- "Australian professionals are resorting to publicly available tools to cope with the increasing demands of this influx of information,



yet still they continue to edge toward breaking point. However, Australian organisations should see an opportunity here. Businesses that take the initiative and provide their workers with the right technology, tools and training stand to gain a significant competitive edge."

The multi-national survey was conducted by WorldOne among 1,700 white collar workers across five countries: Australia, China, South Africa, United Kingdom and the United States. The study was fielded from June 2010 - July 2010.

e.law delves into document review

e.law is moving to take a more central role in ediscovery by offering document review services in Australia, offering to assist law firms struggling with the huge amount of unstructured data involved in litigation.

KPMG estimates that first level document review encompasses anywhere between 58% and 90% of total litigation costs. It can involve millions of documents that must be reviewed by teams of law firm associates, lawyers and paralegals.

Building on history as legal technology service provider within Asia Pacific, e.law will also now offer experienced document review lawyers that can look at a document and decide if it is privileged, relevant to the case and to what degree it is relevant.

This type of service is a major trend in the US and Europe, where contract document review providers do a low level first pass review before it gets handed over to the law firm.

Australia is now catching up with the size, scope and frequency of corporate litigation in those markets, so e.law is looking to move up the value chain for litigation support in the region, by adding the skills of its trained legal teams to the technical solutions it offers for ediscovery management.

Rebecca Grant, e.law's Head of e.courts and General Counsel, said, "The ability to offer subjective document review is a natural progression for e.law and builds on the skills and services we already offer the market.

"The nature of legal outsourcing is changing and with clients placing greater focus on legal costs post GFC we see the demand for this service increasing dramatically."

Allison Stanfield, CEO of e.law adds; "We have always prided ourselves on being trailblazers in the industry and in offering a level of service and quality that goes beyond the standard litigation support model. As an incorporated legal firm with an unmatched pedigree in electronic litigation, the benefits we can offer clients in conducting efficient and cost effective subjective document review are enormous."

To learn more about this new service, e.law is offering an in-house educational seminar on 24th November, 6pm, Level 3, 9 Castlereagh Street, Sydney. More details can be found at e.law.com.au

How the Document Ecosystem Benefits Business

The dream of the paperless office first appeared in the mid-1970s, with some predicting that most record handling would be electronic by 1990. What has evolved instead is an ecosystem of sorts, made up of paper and electronic documents that include the Portable Document Format (PDF) and the Open XML Paper Specification Format (XPS).

Modern organisations should be looking for a way to accommodate and assimilate the various parts of this ecosystem so they can formulate document workflows efficiently and effectively.

Nuance is a document imaging champion, with more than 21 million registered imaging application users. The company led the way in bringing document imaging to the masses by facilitating the use of sophisticated scanning technology on desktops and multi-function peripheral (MFP) devices. Nuance is also a leader in PDF-related technology, and was an early collaborator on XPS.

Microsoft is the most important technology provider in the corporate environment. Microsoft Office applications (Microsoft Word, Excel and PowerPoint in particular) are de facto desktop software and corporate file format standards. Through a joint effort with Microsoft,

Nuance created the PDF conversion category in 2003 to enable manipulation of fixed-format documents in Microsoft Office. With the release of Microsoft Office 2010, Nuance and Microsoft are working together more closely to offer customers increased cross-platform capability within the document ecosystem.

Organisations need to be cognizant of ways their most important constituencies – customers, suppliers, business partners, even the government – want to interact with them.

This is especially true of document platforms and formats.

The most effective document strategy, then, is one that accommodates, incorporates and integrates the most important platforms for document-based

interaction: paper, electronic documents and the Microsoft Office platform. Organisations that can effectively respond to that challenge will successfully negotiate the emerging competitive landscape.

Fortunately, Nuance and Microsoft are working hard to make effective navigation and optimisation of the document ecosystem a reality. CIOs should look closely at the advantages the integration of Nuance and Microsoft technologies bring.



Top 5 Reasons why Nuance is the Better PDF

1. Convert any non-fillable form into PDF forms that you can complete, save, and email.
2. Create or convert PDF directly with the fastest shortcuts inside Microsoft Office & Microsoft Windows.
3. Scan paper to PDF with superior one-click scanning.
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*Savings estimate based on publicly available pricing data as of September 1, 2010; actual savings may differ from this estimate.

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Salmat and SAP join forces

Australian BPO Salmat and SAP have joined forces to deliver a paperless accounts payable processing environment. Salmat will provide back-office automation services including mail handling, document imaging and advanced data capture from invoice documentation. From there, SAP provides the invoice review and approval workflow systems as an extension to the existing client SAP environment.

"Our specialist partnerships with leading global software providers have delivered strong results for Salmat and we are excited about this new partnership with SAP," said Nick Debenham, CEO of Salmat's Business Process Outsourcing Division.

"The Salmat and SAP solutions are fully integrated, allowing out of the box matching of purchase order and approved vendor information as part of the standard solution.

"The solution is well defined and ready to implement immediately with all of the integration effort already performed. This should deliver implementation timeframes for AP automation of less than six weeks for existing SAP clients and will allow clients to further capitalise on their investment in the SAP platform," he said.

The partnership allows SAP to offer both existing and new clients the same access to a transactional pricing model per customer (per invoice), reducing capital costs for implementation.

Number is up for cloud Office

A new version of Microsoft's cloud based Office suite has been launched, dubbed Office 365. Available in the US and due to arrive in Australia and New Zealand in 2011, Office 365 will incorporate the Web-based Office applications, SharePoint and Exchange Online. It also includes Lync Online, the products formerly known as Communications Server, Communications Online and Communicator.

Office 365 will replace previous offerings such as the Business Productivity Online Suite, Microsoft Office Live Small Business and Live@edu. "Office 365 is the best of everything we know about productivity, all in a single cloud service," said Kurt DelBene, president of the Office Division at Microsoft.

"With Office 365, your local bakery can get enterprise-calibre software and services for the first time, while a multinational pharmaceutical company can reduce costs and more easily stay current with the latest innovations. People can focus on their business, while we and our partners take care of the technology."

Pricing will start at \$US2 per user, per month for basic e-mail, or for \$US24 per month. Office Professional Plus will incorporate voicemail, enterprise social networking, instant messaging, Web portals, extranets, voice conferencing and videoconferencing, web conferencing, phone support and on-premises licenses. Later in 2011, Office 365 will expand to include Dynamics CRM Online.

SharePoint ediscovery challenge

StoredIQ has announced a solution that addresses the "complex and unusual challenges" for eDiscovery with SharePoint. The company claims that because of its collaborative nature and its ability to support a myriad of data objects, current eDiscovery solutions for SharePoint needlessly collect and copy mountains of data prior to providing analysis of the content.

StoredIQ's solution fully supports all core SharePoint object types including Blog Posts, Comments, Discussion Board, Calendar, Tasks, Project Tasks, Contacts, Wiki Pages, Issue Tracker, Announcements, Survey, Links, Document Libraries, Picture Libraries, and Records Center, and all associated metadata. The updated integration also uniquely supports nested SharePoint content. For example, StoredIQ will find, index, and collect blogs, threaded comments, and their attachments.

In addition, this expanded integration with SharePoint leverages novel technology for presenting SharePoint content to legal reviewers. Using a proprietary embedded viewer, the

Basware unveils InvoiceReady

Basware has announced a new e-invoicing solution for small and medium sized businesses, InvoiceReady, that is delivered as a service rather than requiring on-premise scanning hardware and software. InvoiceReady automates the accounts payable processes from receipt of invoice, through approvals until payment.

Basware has invested its invoice automation expertise into one workflow solution, providing small and medium sized companies the tools to implement best practice processes within their finance departments. The service provides fully auditable paperless trails, both before and after payment, giving detailed visibility of spend commitments as well as ensuring compliance with local and international finance regulations.

Basware InvoiceReady provides invoice scanning services, data migration, real-time workflow tracking, travel and expense management and a fully auditable archiving service, all available on a per transaction price.

"There is strong understanding within finance departments of the link between automation, accuracy and efficiency," commented Karri Lehtonen, Vice President at Basware, Australia and New Zealand. "For years our technology and thorough knowledge of invoice automation best practice has helped some of the world's largest organisations to achieve these benefits, along with the logical time and cost savings. With InvoiceReady we are now extending that same capability to small and medium sized businesses as a pre-packaged, easy-to-use, on-demand service to help them transition invoice processing from a burden to a value, by improving visibility into their organisation's cash flow."

entire hierarchical structure of SharePoint is displayed, providing complete context for reviewers when navigating complex SharePoint instances. And, to further simplify the legal review process, SharePoint navigation can be scoped to "user views" to mimic the access of custodians-of-interest.

"With the growing popularity of using SharePoint beyond document collaboration, there's a significant legal imperative to provide a more comprehensive view and control of SharePoint content," said Keith Zoellner, CTO of StoredIQ.

Ricoh takes on Aussie OCR app

A Sydney-developed optical character recognition (OCR) application has been picked up by Ricoh for regional distribution across the Asia Pacific region. The application, ESA TransFormer, was developed in-house to provide a low-cost, MFD-based OCR program. Since its launch three years ago, ESA TransFormer has been popular with customers of all sizes due to its functionality and affordability when compared to seat-based OCR products.

"Our regional head office in Singapore was impressed with ESA TransFormer's success in Australia and has since picked it up for distribution across Asia Pacific," said Kathy Wilson, General Manager of Business Solutions for Ricoh Australia.

ESA TransFormer is a simple to use application that is available for Ricoh multifunctional devices and converts scanned documents into editable formats such as Microsoft Word, Excel or searchable PDF.

The latest upgrade of the application features enhancements including multiple language support for the Asian market, improved OCR engine, support for 64 bit operating systems and support for industry standard archiving formats such as PDF/A and JPEG 2000.

MidCoast Water sets Objective

NSW's MidCoast County Council (trading as MidCoast Water) has selected Objective Corporation's content, collaboration and process management solution.

Robert Loadman, Executive Manager Corporate Services, said that MidCoast Water is a community focussed organisation and is in a unique position to work in partnership with the community to shape its future.

"We are committed to providing essential services and the best value for money to our community. We selected Objective because they are committed to the same goals, have experience with local government and understand both ours and the community's needs."

MidCoast Water sought out a solution that would be their single source of the truth, help manage their growing information repository and integrate with key business systems.

The Objective solution will enable organisation-wide access to all information. For staff, it will reduce time spent searching for information and they will be able to quickly access content such as emails, drainage diagrams, land management procedures, maps, engineering drawings, OH&S, policy and procedure documents from all main work locations.

"Water management is a highly regulated industry. We must comply with regulatory standards, minimise health and safety hazards and ensure safety is of the utmost priority when maintaining a high level of service to the public. Objective's secure and compliant solution provides the functionality to mitigate risk of non-compliance and potential exposure to workplace incidents," he said.

"The simplicity of using Objective and the ease with which

you can search for information was seen as a clear benefit. We look forward to embarking on this journey with Objective and experiencing benefits that will be passed on to our community in the form of improved services."

Future plans for MidCoast Water include using Objective to standardise and streamline business processes such as mail and invoice processing and integrate with key corporate systems such as Geographical Information (GIS), Asset Management (AM), Project Management (PM) and customer relationship management (CRM) systems.

Taxing times for taxonomy

Are Australian organisations ready to take advantage of the semantic web and master data management? A recent survey shows that while many are on the right track, there is a need to better demonstrate the business value of taxonomies and metadata. The Taxonomy Use & Skills Survey of 125 Australian information professionals was conducted online by consultants Innotecture and Straits Knowledge in late 2010. The respondents included IT managers, information architects, knowledge managers, records officers and librarians in the public, private and not-for-profit sectors.

Of those surveyed, nearly three quarters are using some form of taxonomy to manage their information, although only 13% were happy with their use of taxonomies and related tools. Many respondents said that they lacked the resources to do so effectively.

Matt Moore, Director, Innotecture, said, "Organisations who wish to make their documents and data accessible externally or internally need to use consistent metadata standards and vocabularies. Taxonomies form a critical part of this information governance process."



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At the heart of the matter

Law firm Sparke Helmore has implemented Autonomy iManage 8.5 to provide matter-related document management for over 650 staff.

Sparke Helmore has undergone massive growth and change in the last 10 years. It operates in eight locations across Australia and shares many clients across all locations which made it essential to find an affordable and effective solution to better support clients and share knowledge. Peter Campbell, CIO and Knowledge Director, said the iManage solution was implemented in 2010 within one year of project approval.

"The new document management system allows matter-centric filing, so all documents and emails relating to a matter are stored together. This has also allowed us to start phasing-out all physical filing of documents for some of our matter types."

A project to move to matter-centric filing commenced on August 1, 2009. The new system first went live in early July 2010 and the rollout was completed in September by solutions provider Trinogy Systems who helped to bring it in on time and on budget.

"This project required sustained and collaborative effort from the whole IT team working closely with our vendors," said Campbell.

"We implemented many innovative ideas to minimise the impact of the change by engaging the firm in the concept of electronic matter filing well ahead of time. We managed to get almost the entire firm to turn up to training through heightened awareness and tangible management buy-in to the objectives of the project.

"We achieved a lot with fairly limited resources by having a high degree of ownership, understanding how the firm works with documents using behavioural profiling, focusing on the high impact areas for the business and conscripting in anyone that could help."

The project included the migration of over six million documents and emails from a Hummingbird DMS repository to iManage 8.5. Two repositories (one in Sydney and one in Newcastle) were consolidated into one single nationwide repository in Sydney.

"This has made it much simpler to manage and has also allowed us to split the storage up based on more logical factors like the age of the matter," said Campbell.

"The migration was achieved using out of the box tools that came with iManage from Autonomy, along with a number of techniques, scripts and tools that Trinogy systems provided. With their extensive experience migrating other firms/systems in the past we were able to avoid purchasing any extra tools."

Email management

Email Management and automated email filing was also introduced, as well as a new full text index. Sparke Helmore is using Exchange 2003 for email in tandem with Symantec Enterprise Vault. The desktop OS is Windows XP with Microsoft Office 2003 and Outlook 2003.

"We had an option to upgrade the version of Office we were using at the same time as this project, however we decided that it would be inflicting too much change on the end users. As it was, the change from one DM system to another one and introducing automated email filing and a new search engine was enough for the end users to absorb. We will look at the next version of Office (probably 2010) in Sep/Oct 2011," said Campbell.

"The iManage product and Enterprise Vault integrate well to make the transition of emails from the Vault into the iManage system seamless for the end users. The email filing component is one of the most popular changes that have come out of the project. The iManage email management module assists users with prompting



"The dramatic improvement in search functionality has enabled better knowledge sharing across the firm in a way that was previously impossible. The new solution also provides substantial savings to the firm in cost of ownership of the iManage system. The project has been an overwhelming success by all measures." - CIO and Knowledge Director Peter Campbell.

for a filing location, through to automatically filing email threads. This has enabled the firm to file many more emails correctly while also reducing the amount of time spent filing."

Dealing with PDF document assembly, a big part of document management at a law firm, was previously handled by a small number of staff using Adobe Acrobat Writer prior to the introduction of iManage.

In addition to rolling out iManage, Sparke Helmore has implemented Docscorp's PDFDocs across the whole firm, making it easier for a much wider group of people to create and manipulate PDFs. For core document automation a set of in-house written VBA scripts are used to pick up information from databases and populate documents with that information.

"We refreshed this as part of the upgrade and will be looking to streamline it further with the next iteration of Office coming up in the future," said Campbell.

A document extranet has also been established to enable collaboration with

the firm's clients, while a new management reporting capability allows administrators to track usage and monitor behaviour patterns of the iManage system.

This has provided a strong measure of the success of the new system in encouraging users to store emails related to a matter in the iManage repository. There were an average of 10,000 emails filed a month in the old DMS system whereas 600,000 emails were filed in the first three months since iManage went live.

In addition to being able to search emails and documents from the one interface, Sparke Helmore lawyers are now benefiting from a more stable desktop environment, with desktop/Word crashes estimated to have been reduced by 30%.

Saving people time and reducing frustration is a big plus now, as

Sparke Helmore At a Glance

Elite Enterprise practice management system
Visualfiles case management/workflow system
iManage document management
Metastorm Workflow Management
BigHand Digital Dictation
Interaction CRM
Docscorp PDFDocs Desktop & Formfiller
Office 2003, Outlook 2003
Exchange 2003 email
Enterprise Vault email archiving

conducting full text searches of the repository takes less than 10 seconds rather than 5-10 minutes (as was the case previously). The new text index utilising the Autonomy Intelligent Data Operating Layer (IDOL) Server was an unexpected benefit of selecting iManage. Shortly after Sparke Helmore acquired the iManage system, Autonomy acquired Interwoven and announced the integration of IDOL as the search engine.

"We have found the scalability and power of the IDOL engine to be significant and it certainly underpins a better search experience. Even better, when we eventually move to indexing other repositories and implementing universal search we will use the same index, code base and infrastructure - it will be only configuration and licensing which will open up a significantly expanded feature set. The improved search tool, tidied up metadata and quick tips training has vastly improved search - both in anecdotal feedback and hard results on the time taken for searches estimated at saving 20 minutes a lawyer per month," said Campbell.

Knowledge management

The knowledge repository and contribution process have improved drastically through a very simple 'right-click contribute' process, better search facilities and improved /simpler classification.

When Sparke Helmore staff find a document on a matter that they think is useful (for instance a well written 'advice') they can 'right click' and 'flag for contribution' from within the iManage interface. This means flagging a document that could be a useful contribution to knowledge is very quick and easy. The practice group/team can then review a search folder on a particular matter (or across all matters) to see what people have considered eligible for contribution.

They can sort out the important documents from the not so important ones and then submit them to the Precedents team with another 'right click' action. The metadata around the document

is captured from its location/context in the system, leaving only a few more electronic fields to fill out before the document is ready to process. Contribution rates have increased as has end user satisfaction as staff don't have to do nearly as much to get documents added to the knowledge base.

Digitising workflow

The level of digitisation of paper documents varies by practice group. The only 'Golden Rule' is that if it is electronic, file it in iManage. Some teams choose to scan all their paper correspondence received into the system using MFDs.

They scan it then file it into the correct location in iManage. Some teams have elected to maintain a paper file for any correspondence not available electronically as they have a need to physically view/handle it or bring it to courts, where paper is still the most common medium. Sparke Helmore hasn't got hung up on reducing paper as the driver is more one around collaboration, searching and classification.

Staff use iManage mostly for collaboration, although an intranet provides a place for lawyers to collaborate on non-client facing initiatives. The iManage portal is used for external collaboration.

Collaboration is solely via email (and phone). Sparke Helmore has trialled a few other social media type applications but hasn't found a significant/killer application which has driven widespread adoption.

As part of its centralisation of content, Sparke Helmore has virtualised the application servers, Dell servers running Windows Server 2008 and SQL Server 2005.

"We have virtualised the application servers however on the vendor's recommendation we have chosen not to virtualise the Database or Index server. These servers have demanding I/O and performance requirements so we were more comfortable with a physical system (at least initially)," said Campbell.

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Governance bites for Global 1000

A survey of information governance practices and challenges in Global 1000 companies has found that defensible disposal is turning out to be a key objective.

Organisations are reacting to the fact that rising ediscovery costs are coupled with the fact that they spend an average of 3.5% of revenues on data management -- much of which has no legal, regulatory, or business value.

The survey, Benchmark Report on Information Governance in Global 1000 Companies, was conducted in collaboration with the Information Management Reference Model (IMRM) project within Electronic Discovery Reference Model (EDRM).

Information governance is the discipline of managing information according to its legal obligations and its business value, which enables defensible disposal of data and lowers the cost of legal compliance.

The study underscores the challenge in connecting the value of information and the associated legal or regulatory obligations with information assets being managed by the IT team -- virtually all material information in enterprises today.

"This Benchmark Report and the survey results it contains are important tools for legal, records and IT executives who want to improve their information management practices. From our EDRM work, we know that much of the cost, complexity, and volume in litigation are a function of companies' practices and habits in information governance," said George Socha, co-founder, EDRM and president of Socha Consulting.

"While I'm not surprised by the findings that data disposal is still out of reach for many companies and that significant organizational challenges exist, they do highlight the important work still to be done to establish rigorous discovery processes that also enable defensible disposal."

The companies surveyed had annual revenue ranging from \$US5 billion to more than \$US150 billion from a variety of industries including energy, consumer goods, financial services, healthcare, life sciences, and insurance.

The study highlights the structural, process, and organizational challenges which undermine compliance and disposal efforts:

- 75% cited inability to defensibly dispose of data as the greatest challenge and many highlighted massive legacy data as a financial drag on the business and a compliance hazard;
- IT, legal, and records disagree on which organization has information management and disposal responsibility;
- While 57% of participating organizations have governance

committees in place, fewer than 17% believe the right stakeholders are involved;

- 98% of companies believe defensible disposal is a key governance objective yet only 22% can defensibly dispose of information today;
- 70% still use 'liaisons and people glue' to link discovery and regulatory obligations to information assets and virtually all respondents enforce quotas on information, leaving them exposed to significant spoliation risk;
- 85% cited the need for a new approach with new processes and consistent collaboration across legal, records and IT as the critical success factor; and
- The gaps between retention schedule development, legal hold communication and actual information management are wide, suggesting the form of schedule has little relevance in today's information environment -- 77% said their schedules were not actionable on electronic information or applicable only to paper.

"Today, virtually all corporate information is managed by IT in its original form and its many duplicates, yet the survey showed that legal holds and retention management practices still function as if information is simply physical records managed by records personnel and general employees," said Deidre Paknad, founder of CGOC, the Compliance, Governance and Oversight Council.

"The survey also showed that while legal executives are well aware of the risks, they have yet to bring the CIO to the table."

The CGOC Benchmark Report on Information Governance in Global 1000 Companies is available at www.cgoc.com

Nuix and kCura team up

Nuix has entered into an independent software vendor (ISV) partnership with kCura, developers of the e-discovery review platform Relativity.

Relativity will utilize Nuix technology to enable end users to collect, process, investigate, cull and transfer selected data into a Relativity database without worrying about load files or other compatibility issues.

"The Nuix and Relativity integration will enable users to more simply utilise a fully-audited workflow from collection through to final review, production and presentation," commented Nuix CEO Eddie Sheehy.

Nuix e-discovery solution can process data types ranging from e-mails and PSTs, to forensic images and unstructured data. This eliminates the need to use different software and technologies for different data. With Relativity, this processed data can be quickly reviewed and analyzed using advanced search and visualization tools including Relativity Analytics and Relativity Pivot.

The cloud calls for Esker

Esker is boosting its R&D staff by 30% to support a push into "cloud" document automation solutions in 2010. These new team members will primarily focus on development, software quality testing and software, infrastructure, as well as platforms delivered as a service. Esker 'cloud' computing services and solutions complement Esker's on premise solutions for document process automation, used for the processing of invoices, bank statements, collection letters, payslips, and marketing and sales documents.

"This is great news for Australian and New Zealand companies, where many companies including BHP Billiton, Orica, Visy, etc are relying on Esker Cloud Computing solutions," said Christophe DuMonet, Managing Director of Esker ANZ.

Before the end of 2010, 20 new technical staff will join Esker's R&D team, bringing the total R&D staff up to 70.

"We are one of the first software vendors capable of offering automation integrating the three layers of cloud computing -- software, infrastructure and platform

solutions. With over 50 percent annual growth in the past five years, these on-demand services have been well adopted by companies around the world, and represent 40 percent of our sales revenue.

"The objective of the growth of our R&D team is to be further develop our leadership position in Cloud Computing services and solutions, and to better meet the needs of our customers," explained Jean-Michel Bérard, CEO and President of the Board of Directors, Esker.

Over 3,000 companies use Esker on Demand SaaS solutions, while 10 million monthly pages are handled worldwide by Esker's mail, fax, email and SMS infrastructure.

Esker has three global data centres - in Australia, France and the United States - while six mail and fax production centres - in Australia, Spain, the United States, France, the United Kingdom and Singapore - are equipped with colour digital printers, industrial folding and metering machines, dedicated lines for sending and receiving faxes, and other capabilities.



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Gorgon Project delivers windfall for Pearson-Harper (UK)

A UK engineering information management specialist is celebrating after clinching a multi-million dollar contract in Australia. Pearson-Harper has been awarded a £6.25million (\$AUD10.3m) contract by Chevron Australia to provide engineering information management (EIM) services and software solutions for the Gorgon Project. At \$A43 billion, the Chevron-operated Gorgon Project, which is developing the Greater Gorgon Area gas fields 130 kilometres off the north-west coast of Western Australia, is Australia's largest single resource project to date.

Pearson-Harper's role involves working with the Project's engineering, procurement and construction management (EPCM) teams to collect and manage the vast amounts of engineering information needed to build and operate the project. Headquartered in the UK and with offices in Perth, WA, Pearson-Harper will create a total of 24 new jobs across the two locations as a direct result of the deal.

Commenting on the deal, Steve Pearson, Chief Executive of Pearson-Harper, said, "This is a highly significant contract for Pearson-Harper. We are recognised around the world as a leader in engineering information management and we're delighted and very proud to have been selected by Chevron to work on this important project."

The Chevron-operated Gorgon Project includes the construction of a 15 million tonne per annum (MTPA) Liquefied Natural Gas (LNG) plant on Barrow Island and a domestic gas plant with the capacity to provide 300 terajoules per day to supply gas to Western Australia. Explaining some of the work involved, Daren Hinchliffe,

the company's Perth based Business Support manager said, "Staff and subcontractors from around the globe working on the Gorgon Project need access to exactly the same engineering information set all the time; 'a single source of truth'. At Pearson-Harper we first collect and verify the data and then enable access via PHusion, our website portal, to give 24/7 access 365 days of the year to the current data set."

"We host both the PHusion software and the information on our servers at Pearson-Harper. As an ultimate safeguard, our system is 'dual hosted' underpinning our Enhanced Disaster Recovery system and providing 100% integrity to both data and systems."

ReadSoft wins \$A750K NSW shared services bid

NSW Government shared services agency Service First has selected ReadSoft solutions to automate approximately 160,000 invoices per year in an agreement valued at over \$A750K. Service First is implementing the ReadSoft accounts payable automation solution to automate the processing of invoices from arrival to payment – including invoice capture, matching, and automated workflow approval processes.

ServiceFirst combines 540 staff servicing 80 NSW Government Agencies that hold around 8800 staff. The accounts payable automation solution also incorporates advanced reporting functions, giving immediate visibility into the accounts payable processes.

"More and more government organisations are recognising the benefits of accounts payable automation solutions and ReadSoft has established a reputable standing in the Oceania shared service sector," said Jan Andersson, President and CEO at ReadSoft.

SE Water gives paper the flick

Victoria's South East Water is moving to replace paper-based systems with Motion F5v rugged Tablet PCs for its Trade Waste team, with several other departments now testing the technology.

IT Project Manager Mark Skilton said a 2009 review of their work practices identified promising benefits for their Trade Waste team from mobile technology combined with its proprietary software, TWIS, and Microsoft OneNote.

"That department didn't have any IT or computer-based practices, so we were replacing paper-based solutions. We can already see a significant reduction in paperwork and printing, approximately 30 percent less, even in this trial period."

Working with long-standing IT partner Gamma Solutions, the Motion F5v's were identified as the top solution after an eight-week pilot. The organisation has equipped Trade Waste inspectors with F5v Tablet PCs, together with docking stations, FlexDocks for home use and vehicle battery chargers.

"We looked at alternative solutions a couple of years ago, testing out laptops and other devices, but the trade waste inspectors do a lot of walking around and found them unsuitable to carry and work with.

"So one of the key drivers for us was finding a form factor that our team liked and the F5v's integrated handle, light weight and size were a fit. The field inspectors like the predictive handwriting, the ability to use the tablets in the rain, and in direct sunlight.

"Officers can also draw diagrams directly on screen onsite, and they take a lot of pictures, which can all be combined in the same OneNote file while onsite. The tablets are compatible with the latest Windows software,

which is a familiar environment for our programmers rather than other mobile devices."

The Trade Waste team covers urban to rural customers across a variety of industries from restaurants to shopping malls, wineries, factories and commercial buildings. With more than 8,000 customers and some 5,000 inspections annually, inspectors regularly encounter new managers and staff, who don't have information from previous inspections. Remote access to historic information via the tablets will help here.

"This is one area where paper-based systems were very inflexible; we needed to provide officers with access to real-time information, such as requests made on earlier customer visits. They used to have to print out or take paper notes from a previous visit, sometimes re-typing and uploading pictures and information again.

"The technology has already won us a better reputation with customers, who can ask questions and get immediate answers via mobile wireless while the officer is there with them onsite.

Skilton said that the tablets are generating a lot of interest within the organisation. "We are now testing them in three other areas, including tankering, field auditors out on construction sites and with our 'US' utilities services trucks, which repair things like burst water mains and which have been working with rugged laptops. The Trade Waste team is considering trialing the tablets on the large number of samples they take to check contaminants, which are then sent to the laboratory for testing. They will be testing re-writable RFID tags that are dropped into the water and can be read on the tablets, which eliminates the risk of the tag coming off or being smudged, or getting samples mixed up."

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Prescribing E-Health's Magic Pill

In May 2010, the Federal Government announced it plans to spend \$467 million over two years to introduce "personally controlled" individual electronic health records as part of a national health reform agenda.

Australia is nearly 18 months away from the scheduled delivery of a personally controlled electronic health record (PCEHR) for every citizen who wants one.

Like many in the healthcare industry, Doug Horsley is keen to learn how the PCEHR will work in practice.

Will it be a push to encourage Australians to upload their data to hosted offerings such as those available from Google or Microsoft? Will it be a centrally controlled database maintained at the state or federal level?

And if the individual truly has "personal" control over their record, how will a physician or clinician view it as a legitimate basis to recommend any treatment?

Horsley is Chief Information Officer at Australia's largest Catholic not for profit private healthcare group, St John of God Health Care (SJGHC).

SJGHC operates four hospitals in Western Australia, seven hospitals in Victoria and two hospitals in New South Wales, as well as home nursing and pathology services in WA and Victoria, and Social Outreach and Advocacy services reaching out to people experiencing disadvantage in Australia, New Zealand and Asia-Pacific.

"As the primary health care provider, the GP arguably has more information than anyone else. After a patient is treated in a hospital, the specialist or the hospital then sends a discharge summary back to the patient's GP – as a result, the GP becomes a vital link. The role of the GP could grow quite substantially if they use the PCEHR to be proactive in managing health," said Horsley.

One of the great advantages in Australia is that over 95% of GPs have computers, and the National Electronic Health

IT IS NOT CLEAR WHAT WILL BE THE SCOPE
OF THE INDIVIDUAL ELECTRONIC HEALTH
RECORDS TO BE STORED FEDERALLY IN
AUSTRALIA.

Transition Authority (NEHTA) is financially encouraging GPs into electronically transmitting information such as referrals to specialists and prescriptions or a request for a diagnostic test.

There is a wide range of electronic data connected with a patient, whether it is the electronic patient record, their medical images or associated administration files. It is not clear what will be the scope of the individual electronic health records to be stored federally in Australia.

UK opts for GP record

A review of a similar plan in the UK has determined "the core record should only contain a patient's demographic details, medications, allergies and adverse reactions, and that these should continue to be copied from the GP's medical record."

"One of the biggest challenges health has is the number of stakeholders that have an impact on outcomes - it's probably the most complex industry vertical I have worked in or come across," notes Horsley.

"All of the information is very siloed. For instance, if you have a procedure, then the specialist retains the information associated with it and may inadvertently hold on to that information, without necessarily sharing it with other health care team members.

"We have an IT strategy to progress toward electronic medical records and that's been approved by our executive. However, I don't believe there's a solution in Australia that you can install like you could install a package for a manufacturer or a banking organisation

– you can't just go to the market and buy an Oracle or an SAP, it doesn't work that way.

"There are many good clinical packages out there but not one large package that fulfils all our requirements."

A "Big Bang" approach - replacing hundreds of siloed legacy applications in a hospital with a single institution-wide application with centralised data - is not something that Horsley is keen to adopt.

"I don't think that would work because of the amount of change management required from all our clinicians, doctors, specialists, nurses and the rest of the health care team.

"To me, the big challenge is managing change, no one is going to volunteer for change, because it brings risk and this will result in a lot of time being invested to make it work.

"In other industry sectors you can tell people their job is going to change, they're not going to fill in a form any longer and they have to visit a computer screen. That may not necessarily happen in health, as in the private health world, each surgeon, specialist, anaesthetist are their own boss. They determine if and when they will change and that is going to create a big dynamic.

"Doctors are time-poor as are most clinicians and nurses, so they need to walk up to a PC and be signed on and ready for action. We'd need to use 2-stage authentication, but it needs to be easy for them to enter or retrieve information.

"Our approach is more a best of breed approach so we can manage the change in any particular area and go step by step. Will it take longer? Yes. Has it got a bigger chance of success? I would say absolutely, because we are taking it one step at a time. It may be more expensive to tackle it one piece at a time, and you do have the challenges of integrating different data repositories and the issue of interoperability.

"The health sector, because of its history, has a lot of homegrown solutions that people are familiar with and moving to another standard is quite a challenge. Change management is going to be difficult but not impossible."

St John of God Health Care is developing a pre-admission portal to provide patients with a means of submitting information to the hospital before they are admitted.

Horsley believes other patient portals can be developed, although it is unclear how these will relate to the PCEHR.

"We need to make life easy for doctors to make this change happen"
- Doug Horsley, CIO, St John of God Health Care (SJGHC).



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E-records are the healthy choice: UK survey

UK research has discovered that half of doctors expect Electronic Patient Records (EPRs) to improve patient care by providing verifiable, consistent and complete data to support verbal handovers between medical staff.

"Electronic Patient Records (EPRs) will improve patient care, but only if the data feeding those records is well-managed," said Cotterill, Chief Executive of BridgeHead Software, a healthcare storage virtualisation company.

"Healthcare data volumes are rising day after day. Secure data management is a challenge that cannot be avoided if hospitals are to prevent compounding their current infrastructure challenges as data volumes grow.

"To get the most value out of any digital patient records system – and in my view, the term 'digital patient records' encompasses all electronic data connected with a patient, whether the EPR, medical images or associated administration files – it is necessary for hospitals to consider a number of important factors concerning their data and storage management infrastructures.

"To be effective, patient records systems need to be underpinned by a robust data management and storage strategy so that data can be accessible and available to the relevant clinicians, hospital or administrative staff where and when it is needed without delay. Simultaneously, the data must also be safeguarded from inappropriate use and retained to support long-term patient care. An interoperable, vendor-agnostic data management and storage solution tailored specifically for healthcare's complex data environment can streamline the management of patient information so that all hospital data can be stored in one central repository owned by the hospital," he added.

"We could provide pathology results through a portal, but a problem with this approach is you then need another portal for the radiology results and another for the oncology results. If you present that as a way forward for a doctor who is used to working with paper, they would see that as a major barrier to change because he may have to sign on to half a dozen different systems to get the information he needs. We need to make life easy for doctors to make this change happen, so portal technologies and the use of composite type systems is important to pull information together."

"Part of the challenge is who owns the data. We are a not for profit private hospital, so is it the specialist who owns the data or is it the patient? I am not sure we understand that right now. NEHTA are developing the discharge summary which is information relayed back to GP, such as what medication the patient is on, how the surgery went, but the patient doesn't really see any of this. The patient might be given a letter from a GP to see a specialist, who in turn might ask the patient to get an X-ray, but it's not the patient who manages the information, it's the medical profession."

"Providing effective health care in progressive nations is proving more challenging and in today's economy, nations need to address this accordingly or risk facing bankruptcy. Health, like other industries, are always seeking to invest wisely."

Incremental value

Mal Thatcher, Chief Information Officer at Brisbane's Mater Health Services, believes that rather than the technology platform, the key issue is whether the architecture of the PCEHR will allow for incremental value from day one.

"It has to allow value to be delivered from day one with what the health sector has available to share, and then grow in value as providers and consumers increase their participation."

A network of seven hospitals in southeast Queensland, Mater Health Services and its 7500 staff and volunteers provide care to some 500 000 people each year.

Standards Australia push for electronic prescriptions

Standards Australia has asked for industry submissions to design a platform for electronic delivery of prescriptions in Australia.

The need for Australian consumers to maintain their right to choose a pharmacy has been flagged as a major priority for the new platform.

Standards Australia is also keen to ensure interoperability between service providers.

Earlier this year, the federal government agreed to provide individual pharmacies with a subsidy of 15 cents for each prescription dispensed to help pharmacists offset the cost of changing to electronic prescriptions. This includes a requirement for prescription exchange vendors to comply with NEHTA specifications within two years of the final specifications being released.

The Royal Australian College of General Practitioners estimates there are 25,726 General Practitioners (GPs), working in approximately 7,500 general practices in Australia.

It is estimated that 96.7% of practices have a computer for clinical or administrative use, these computers are predominantly used for prescribing, receiving pathology results electronically and for Internet use. In terms of medical records, 53.5% have electronic medical records and are completely paperless, and 34% report using a hybrid system of part paper and part electronic.



Thatcher is curious to know what incentives will be introduced to encourage providers to participate in a meaningful way, and what Australian controls will be implemented to ensure the data available within the PCEHR is current, accurate and timely.

"How will the implementation of the PCEHR better engage consumers/patients in their own care?" he asks.

According to a recent US survey, doctors' use of e-mail with patients is the exception rather than the rule.

The Center for Studying Health System Change (HSC) found that overall, only 6.7 percent of all office-based physicians nationally routinely e-mailed patients about clinical issues in 2008.

About one-third of office-based physicians in 2008 reported that information technology for communicating with patients about clinical issues via e-mail was available in their practice. Of the physicians with access to e-mail, about one in five (19.5%) routinely e-mailed patients.

"Despite strong patient interest, physicians are not rushing to e-mail patients," said HSC Health Research Analyst Ellyn R. Boukus.

While the survey did not ascertain why physicians do not e-mail patients, physician concerns about lack of reimbursement, the potential for increased workload, maintaining data privacy and security, avoiding increased medical liability, and the uncertain impact on care quality are commonly cited as reasons why physicians may be reluctant to use e-mail.

GPs at the forefront

Dr Mukesh Haikerwal, National Clinical Lead for NEHTA, said general practice is well positioned to support national e-health initiatives.

"With over 98 percent of GPs using computerised healthcare systems for clinical purposes and, 117.4 million GP consultations provided each year, GPs will be at the forefront of driving e-health in Australia. We know that GPs can provide a GP Health Summary for the vast majority of Australians, and this information will form the basis of data for electronic communication between healthcare providers and will be a key component for electronic health records," said Dr Haikerwal.

The Royal Australian College of General Practitioners (RACGP) estimates that 53.5% of practices have migrated to a completely paperless practice, while 34% use a hybrid Electronic Health Record (EHR)/paper system.

There are many different practice management systems competing for the attention of local GPs and medical practices, but around four provide 90% of the installations and dominate the market.

Josephine Raw, General Manager, Practice Innovation and Policy at the RACGP, highlights a number of challenges to a national electronic health record.

These arise from the lack of compliance testing of GP clinical systems, poor integration and few standards for data collection,

recording and measurement.

With the PCEHR only 18 months away from promised delivery, there are still many questions unanswered.

Will the individual health records be manually entered or transferred from existing electronic patient records held by GPs, medical centres, specialists and hospitals?

Doctors and hospitals use a wide range of different information systems for storing patient records. How will the PCEHR address the challenges of reconciling different database schema?

How will the process of uploading individual records take place, and at what stage will the individual be able to review the data that is uploaded? Who will automatically have access?

Will individuals receive notification before the data is uploaded? At which stage can they opt out, or must they opt in? Can they opt in later?

Who will be responsible for digitisation and the costs involved? Will it be mandatory to provide electronic records when the government requests? Will there be funding incentives from the federal or state government for medical facilities to digitise their records, as under the Obama administration in the US?

Will the funding cover the total cost of upgrading information technology to meet the requirement? In the US it has been estimated the cost of transition to electronic systems costs \$US40,000 to \$US45,000 for each doctor, nurse practitioner or physician assistant in practice, plus \$US15,000 a year for maintaining the system?

How will a patient's individual record be accessed in an emergency? Must the patient give consent?

What are the regulations that apply to safeguard how the electronic information should be stored, transferred, and used to ensure the privacy of individually identifiable data related to a patient's healthcare?

Health and Ageing Minister Nicola Roxon has announced an e-health conference to be held in Melbourne at the end of November, to discuss delivery of electronic health.

Secure messaging adds the missing link for ACT Health

A secure messaging network has gone live in the ACT to allow doctors hospitals and healthcare providers to communicate via the HealthLink communication network. The service connects GPs using clinical and practice management software from HCN to HealthLink, adding a further 1000 sites to the network.

HCN's Medical Director software is used by more than 17,000 medical professionals and over 2,300 specialists. HealthLink is claimed to be Australia's largest health communication network, used by 5300 practices, hospitals, laboratories and acute care facilities. This interconnection will enable any practitioner using Medical Director to send clinical information to any healthcare provider on the HealthLink network.

"For GPs, the ability to send referrals by secure messaging direct from the patient's electronic medical record, is not only time and paper saving but allows the GP to receive acknowledgments that the referral has been received and to be informed in a timely and reliable way about scheduled appointments," said Dr Peggy Brown, ACT Health Chief Executive.

ACT Division of General Practice President Dr Rashmi Sharma said "connecting all health care providers and developing capacity to support team care and communications between providers will support a viable and accurate personal health record."

"By replacing paper based systems, patient care will be improved, ensure accurate and secure information transfer, supporting the transition when a patient changes or moves between health care providers".

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Digital admissions

The move to Electronic Health Records (EHRs) at Barwon Health has delivered real benefits, says Health Information Services (HIS) Operations Manager Michelle Martella.

Barwon Health administers to 390 acute beds at Geelong Hospital as well as 511 sub acute and aged care beds, 40 Mental Health beds and 18 community sites, servicing 400,000 people across the Barwon South West Region of Victoria. It began its project to replace traditional paper medical records in September 2007, and already had in place a unique patient identifier across all 23 sites.

Barwon Health has now reached a stage where most of the records and correspondence associated with a patient are digital.

Three operational units are almost completely paperless, being Palliative care, Intensive Care and the Emergency departments.

The revolution began when Barwon Health chose the Australian-developed BOSSnet Digital Medical Records (DMR) system from Core Medical Solutions (CMS). This was an evolution of The BOSS system that has been providing patient management and results review functionality to clinicians at Barwon Health since 2001. The BOSSnet DMR platform delivers a singular view of patient records by multiple users, it is not necessary to go to different applications to view results, correspondence, etc.

Whether the data is captured directly into the system, scanned in, or application switches to a separate system, the user only needs the one password, making it the one-stop-shop for viewing clinical information.

"For some staff it was possibly the biggest change in their career. The change was well managed and became a platform for strategic integration with other clinical system as part of our ongoing progression to a fully integrated EHR," said Martella.

The medical world is a jumble of acronyms, and the digital revolution has added a few more to the mix.

THE MOVE HAS ALSO SPAWNED ADDITIONAL SCANNING PROJECTS, INCLUDING HR RECORDS AND FINANCE DOCUMENTATION.

For instance, Barwon Health refers to two stages of the migration: the Digital Medical Record (DMR) and the Electronic Health Record (EHR). The first is an umbrella term covering electronic capture and delivery of information that has traditionally been stored on paper and is now scanned, whereas the EHR adds information that is entered into the system electronically, such as the discharge summary, pathology/radiology, operation reports, outpatient letters, or data from external electronic systems.

The migration to digital has not been accompanied by a large back-scanning of patient records on paper. After undertaking a project to identify the essential documents that would need to be scanned, it was realised this could not be anything less than every single document on a patient's record.

"We also considered scanning the old history on demand, as the patient presented to the organisation. This was a not viable option, given the old forms are not bar-coded and would become a flat file in the DMR, which would be difficult to navigate. The time spent to scan may not be beneficial if the patient never presented again," said Martella. "The decision was made to make the pre-existing medical record a 'closed file' from the DMR go-live date. Think of it as a library book, for viewing purposes only. This has worked extremely well and has minimised any confusion as to where to look for clinical information."

Barwon Health is enjoying many of the advantages of the

migration to digital, not the least being a full read/write audit trail which is reportable to the millisecond.

"The EHR provides automation and streamlining in workflow, improved decision support, patient safety, quality care, increased reporting and research abilities and ultimately – patient outcomes," said Martella.

"Reasons for a move to DMRs are often simply a cost management strategy to improve paper flow, and record storage or access. The reason for a move to scanned records should be part of a longer term strategy to move to a computable record that can be both accessible when needed, and able to provide automated clinical decision support at the point of care (e.g. clinical pathway automation). If these considerations are not part of the initial planning, a lot of the potential benefits will be lost, or will become costly additions at a later stage."

Paper still has a role to play, as clinicians can still make notes on bar-coded Medical Records forms which are subsequently scanned. Non bar-coded forms can be scanned by manually searching for a barcode type. All of the paperwork for a current episode of care are kept in a 'current' folder on the ward which a courier collects twice daily and delivers to HIS for scanning. The scanning workload is around 10000 sheets per day.

Clinician notes written to paper are scanned within 24 hours, and then the original sent to off-site storage. Full destruction is not being contemplated at this stage. The problem of having "siloes" of clinical information did result in some initial resistance to moving to a single electronic health record (EHR), with concerns regarding broadening access and patient confidentiality.

However while specialist systems that are well embedded are very much needed in these silo sites, having the information viewable in the one place, for all who are involved in a patient's care, has seen a spread of support for sharing patient information and the 'one stop shop' DMR. Being a pioneer always results in some additional challenges, something definitely appreciated by Barwon Health after its early digital migration.

"If the health informatics standards covering scanned records, EHR structure and interoperability that are available now, were available then, the whole process would have been easier and allowed us to make more informed decisions about our needs, processes and priorities," said Martella.

"We would have been able to identify the scope of relevant current standards, and been able to inform Standards Australia of required updates to those standards – leading to ongoing improvement and communication throughout the health information industry in Australia (using standards for ongoing process improvement). When Barwon started there were few standards that would have assisted, - this is no longer the case."

Would a "big bang" approach to the changeover to full electronic health records (EHR) have been easier? Martella is not convinced it would.

"We will continue to progress down the path to a full EHR, but believe the stepping-stones we have cemented with the DMR will pave the way for a smoother and more successful EHR. The transition to remove paper totally presents a lot of obstacles to consider. The right and available technology to support bedside documentation, the impact to staff who are not confident computer users, clinical risks, improving (not hindering) workflow, and the enormous project resources, to name a few."

"WHEN THE PERSONAL HEALTH RECORD (PHR) BECOMES A REALITY, WE WILL BE WELL POSITIONED TO SHARE PATIENT DATA." - MICHELLE MARTELLA, DIGITAL MEDICAL RECORD PROJECT MANAGER, BARWON HEALTH



ReadSoft CEO looks beyond capture

A document automation pioneer has a new view on the potential for the market today and in the future.

After 20 years as a pioneer in document automation, ReadSoft co-founder and CEO Jan Andersson feels there is still immense opportunity for growth in what remains a largely untapped market. After a buffeting at the hands of the global financial crisis in 2008, ReadSoft determined to focus its development resources on three product areas; SAP, Oracle and Capture. On a recent visit to Australia to meet with customers, Andersson reflected on success in this area and long term opportunities in products for small and medium business.

IDM: What was the opportunity you saw in 1991 that led to the formation of ReadSoft?

After university I got a job with a small Swedish company producing software for the mail-order industry. I travelled a lot internationally and wherever I went, there were floors full of people keying in documents and forms. I thought there must be a more efficient way to capture this information. There was some basic OCR technology available at the time but nothing that could take an ordinary form or an ordinary document and process it.

I spoke to a good friend from University in Norway and over a few beers we agreed it would be possible to build software like this and we decided to do it in our spare time. We were really passionate and worked around the clock, we found it really challenging and the task of writing software to recognise, handwriting, barcodes and check boxes was really difficult. It took us a couple of years before we had anything. We showed that to financiers and got money together, sold our cars and told our wives we'd be eating spaghetti for a couple of years, that was back in 1991. Took us a couple of years to build a system and started selling it in Sweden. At the same time there were similar systems being built in other parts of the world. The reason was that computers had evolved, it is very CPU intensive to process images and you also need a graphical environment, which evolved with Windows.

We made a number of important inventions. In the past when you needed to process a document you needed to program an application. We developed a piece of software where you could scan an empty form and mark out on screen on that image where you wanted to read. You could also make a definition of the information and then you use that template to process the filled-in documents. The need for this kind of technology was indeed huge. Now sitting here 20 years later I can say we have so far only scraped the surface of the need that is fundamental in every organisation, in every business. When it comes to AP automation and invoice processing, in the Scandinavian countries we have been selling solutions for over 10 years. We have succeeded with very large organisations but we are now seeing it adopted by football clubs and local fire departments. Every organisation process invoices so every company is a potential user of this technology.

During the 1990s we had rapid development of business based on FORMS, I think it is still the best solution to process documents from forms and we still sell a lot of this today. Then we did our IPO in 1999, a fantastic time when IT companies could get venture capital very easily, (at one times we were valued at 8x our revenue). Then we had the IT bubble that burst in 2001 which hit our growth and we sustained losses and had to pull back on our cost side. Since then we have been trying to grow moderately. Growth of 20-25% is sustainable; trying to double the company size every year is too risky.



"... the needs are there for mid and small sized companies and we haven't reached out to that market at all." - Jan Andersson, ReadSoft.

IDM: What are the growth areas for ReadSoft today?

We started to work with INVOICES in the late 1990s and today we cover the whole 'purchase to pay' lifecycle and 'order to cash' processes.

PROCESS DIRECTOR is a very exciting technology in the SAP area where we can automate the full purchase to pay lifecycle but not only that, also HR documents and request driven processes that can help service centres and other organisations process their work.

On the Oracle side we are not quite as mature in our development as in the SAP side. We are lagging a little behind. In essence we are merging the capture technology that we built with the process automation technology to handle the same document driven information. We were the first company that did that in 2002-2003 to combine capture and process automation.

Our competition in many ways follow in our tracks, we have a very strong position in the market today, where if we add up all our installs, and we then add up all our competitors, they won't even reach half of what we have. So we are quite dominant in this area.

IDM: Do you see opportunities in the SMB market?

We have only scratched the tip of the iceberg so far internationally. Today we are automating the needs of many of the Fortune 1000, and here in Australia we are working with the service centres built by state governments and helping them to automate, but the needs are there for mid and small sized companies and we haven't reached out to that market at all.

There is no doubt in my mind that eventually companies will automate processes for this; to have manual processes doesn't make sense, it's too expensive. We don't view it as a back office function, we view this as something companies have to do to stay competitive, it's not possible to keep up services levels with customers and suppliers unless you automate in this area. It's an offensive measure that companies must take to stay competitive.

IDM: Has the market become more difficult with the number of competing solutions in the market?

Actually, if you look at the number of vendors that are technology producers it's not that many. It's a very limited number. However when we take our partner network into account then it looks like a lot of companies are selling solutions in the market. There are a few Americans, a few Europeans and one Israeli. I could count them on the fingers of my hand.

IDM: Do you think there is a long term future for document automation, or will electronic data interchange take over anytime soon.

There is no doubt in my mind that e-invoicing will grow, but we have not ventured into becoming an electronic invoicing exchange. If you look at the companies that are in this sector, there has been a huge investment to go electronic and there are very few that are profitable, if any.

We think it's difficult to reach a critical mass or volume, and once you do it becomes very competitive and the price per transaction drops. So we think it's better to offer the high value solution to an end customer because the content on an invoice sent through paper or electronic is the same. What is costly is the exception handling and the checking that information is correct and handling the exceptions when it's not. That's why the process automation part is so important.

We want to make sure we can connect in with electronic workflows and supply a large volume of electronic solutions today that help customers handle their EDI-based transactions. You can view that as taking a step away from capture but we do not. We are trying to build a bridge between the paper-based world and the electronic world.

IDM: If the business case for document imaging, OCR and automated workflow has been proven many times over, why are many organisations still undertaking manual data entry and paper records?

First of all, we must understand that this is not a technology that can always read everything perfectly. It does depend on the image

quality of the scanned document. For instance, if we go to China they use very thin paper and the scanner light shines through it and you get background information. Then you have documents that are faxed in. If you scan in documents you need to ensure that scanners are clean, otherwise you will get distortions. There are all sorts of challenges that need to be overcome to have a perfect read environment to start with. Secondly, the challenge is still there to increase the automation level. There are a multitude of looks and a variety of fonts that must be negotiated to pick up if a document is an invoice and process it. I think it's a huge challenge, but we have come far. We have incredible productivity levels in some of our sites, and it amazes me what is being achieved, because I know how hard it is to do having programmed a lot of this in the early days of ReadSoft. Many of the sceptics should go and take a look at what can be achieved.

IDM: How is market responding to PROCESS DIRECTOR?

Many of our customers are rolling out AP automation now, and that works well, what we are now discussing is taking the next steps to automate other document workflows and increasing the selfservice levels.

PROCESS DIRECTOR is the result of the experience we have from the COCKPIT solutions we have installed at many Fortune 1000 companies providing service centres. We decided to build this solution four years ago and have introduced it this year in a limited number of markets. We now have about 12 customers up and running with this solution today and are launching it in Europe and the US this year, and Australia next year. The focus of this solution is to help service centres to automate AP processing and a great number of other documents in the purchase to pay chain. And 'order to cash'. We have taken a look at the pain points of service centres and focussed to produce technology that will help them to become much more efficient. Today, when we are presenting this technology to customers, once they understand what it can do they come upon with processes to automate that we didn't even know about. We are learning as we go with this product.

IDM: ReadSoft has high visibility in the SAP marketplace, are you faring as well with Oracle users?

It's a big growth area; we took a lead with our SAP technology and decided to copy our success in the Oracle area. So we bought a small business in Denmark that had a solution. The market potential in the Oracle space is enormous as well. We now have a lab in Raleigh, North Carolina developing very exciting technology. Oracle has been through a massive change in its technology base, having acquired JD Edwards, PeopleSoft and other business and they are in the process of merging these technologies. They launched the Fusion middleware and vendors including us have had to redevelop their technology to fit in, and that's been a bit of an effort. That same change hasn't happened in the SAP area, so it's been a challenging path.



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'Industrial Strength' document management with SharePoint

An insurance company in San Francisco, a manufacturer in Germany, a professional services consulting firm in Toronto - all looking to use SharePoint 2010 as their document management platform, but finding that they cannot satisfy their requirements by using SharePoint's 'out-of-the-box' functionality. Noel Williams looks at how requirements were met by using a combination of SharePoint 2010 and add-on software from the MacroView Document Management Framework.

An incident that brought home to me how organisations are looking for 'industrial strength' DM features in their SharePoint-based DM solutions was an enquiry that we received from a Life Insurance company based in San Francisco.

They were scanning incoming paper documents and storing them as PDFs in SharePoint. They wanted to implement processing workflows based around these PDFs, but were encountering significant difficulties as they attempted to re-save PDFs that had been opened from SharePoint into Adobe Reader or Acrobat. Re-saving the PDF was causing the existing copy of the PDF to be deleted, so that metadata needed to be entered again 'from scratch'.

The SharePoint integration available from Adobe Systems for Adobe Reader and Adobe Acrobat is very limited both in terms of metadata capture and volume handling. We were able to address these requirements by using add-on software called PDF SharePoint Save.

Installing this software adds 'Save to SharePoint' customisations to Adobe Reader and Adobe Acrobat. These customisations allow a PDF to be saved or re-saved to SharePoint, with full metadata capture. On re-saving a PDF that has been opened from SharePoint, PDF SharePoint Save automatically navigates to the document library from which the PDF was opened, prompts for a new version (if versioning is enabled for the library) and displays already-captured metadata so that it can be viewed, and if necessary edited.

The need to re-enter all metadata values is eliminated. PDF SharePoint Save is part of the MacroView Document Management Framework (DMF), and as such has the added advantage that it copes efficiently when saving and re-saving to even very large SharePoint document stores.

Unique document numbers

A second such enquiry was from a German manufacturer. As part of its Quality Management system it prepares extensive process and product documentation in Word, Excel and PowerPoint. Each item of documentation is required to have a unique Reference Number and to be subject to Version control.

The firm recognised that SharePoint 2010 could handle the assignment of unique document numbers to documents as they are saved or uploaded. However what it really needed was for the unique document number and the current version number to be displayed in the footers of documents that were retrieved from SharePoint into Word, Excel and PowerPoint. This functionality is well supported by document management systems such as Documentum, Autonomy FileSite and OpenText eDocs, so it was frustrating that it was not offered in SharePoint 2010.

The firm had created a partial solution using field codes in footers of Word documents but this approach was not feasible for Excel and PowerPoint documents.

We showed the German manufacturer how they could satisfy

their footer requirements by using MacroView Unique Document Numbering – another DMF module. MacroView UDN adds value to the Unique Document Numbering provider that comes with SharePoint 2010 by improving the integration of SharePoint 2010 with Microsoft Office applications so that these unique document numbers and other metadata are automatically displayed in document footers.

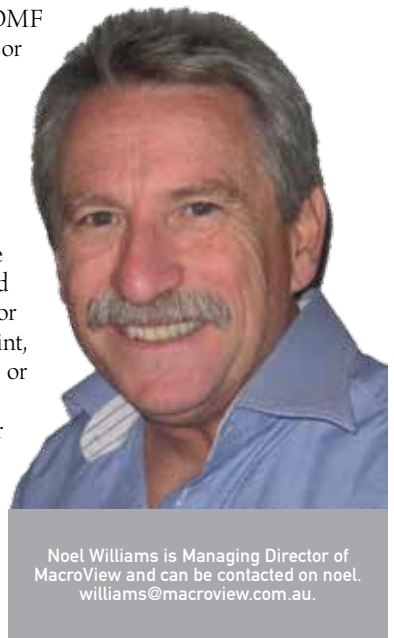
Experience with 'traditional' document management systems inspires much of the demand for more sophisticated features in SharePoint-based solutions. Organisations are feeling confident that SharePoint 2010 provides the platform 'plumbing' for storing and searching serious volumes of documents and their metadata. To create a feasible business solution however they also want interface features and functionality that at least match those provided by the DM systems that were available long before SharePoint.

I saw a good example of this in my recent discussions with a professional services consulting firm in Toronto, Canada. It had been licensing Autonomy (previously Interwoven/iManage) FileSite for many years and users liked the way FileSite allowed them to perform all their DM activity while working in Microsoft Outlook. The firm noted the irony that while Outlook and SharePoint were both Microsoft products, the out-of-the-box integration between Outlook and SharePoint was particularly poor – so much so that they could not even drag and drop to save email messages to SharePoint.

We showed them the market-leading integration of Outlook and SharePoint that is provided by MacroView DMF. Installing DMF adds a new pane to Outlook 2007 or Outlook 2010.

This DMF pane enables accurate viewing, efficient navigation and drag-and-drop saving of emails and attachments to all areas of a SharePoint document store. The new pane also provides a convenient and intuitive interface for searching for documents stored in SharePoint, based on their content and / or metadata.

MacroView DMF adds other functionality that users expect based on their experience with traditional DM systems, such as previews, full-function document numbering, easy to use document level security, and enhanced version handling.



Noel Williams is Managing Director of MacroView and can be contacted on noel.williams@macroview.com.au.

A season for change at JJM

Angela Summers is Manager, Records & Information Management Aust/NZ for Johnson & Johnson Medical (JJM). IDM asked Angela to outline some of the challenges she faces working at one of the world's largest health care organisations.

"Our challenges are not unlike many other companies in information overload - mobility, real-time access and the records generated are moving many companies into the IM of the RIM world. Couple that with working in a local environment for an international company and it gets really exciting!"

"I think most in our profession will agree that one of the biggest challenges in RIM is selling your worth to businesses that have higher priorities, and marketing your brand. JJM is not unique in this area. It's easy to use the "compliance stick" to make people address their RIM requirements but how does that really engage your colleagues and show them the benefits of a robust and dynamic RIM program?"

"For me, I take a different approach to many in our profession in the way I handle RIM – maybe a little less conventional but achieve my outcomes with little or no pain to those around me - in doing so, I engage those around me by building credibility and enthusiasm for what I do to help everyone else. If my fellow colleagues are out there every day improving the lives of our communities through the products that we offer, I want to make sure that the service I provide in a support role makes their compliance to RIM requirements easier, more practical and less onerous."

IDM: You are part of a major global organisation. Does that proscribe your role in Australia or are there unique aspects to the local environment?

"It's actually a very exciting environment to work in – supporting a head office in the United States of America as part of the Johnson & Johnson family of companies, but being a local company operating in Australia & New Zealand. In a situation like this, we have to support and implement US legislation as well as ensure that we comply with our local requirements not just here in Australia but in New Zealand as well."

"It helps when we are all adopting the same international standards in RM – our local strategy supports ISO 15489 and my worldwide team are implementing company standards that also support ISO15489 – makes for a very cohesive international team which is normally a challenge for cross border teams."

IDM: What are the standards you need to be concerned about for compliance?

"I suspect this is as long as a piece of string, as each different function or role will be impacted by external and internal standards – for example in IT there are standards in Information Security which will impact my initiatives for virtual RIM; there are then those standards that we are all familiar with in RM that align with ISO15489 but add to this 18 company standards that require detailed operational support locally; then of course there is Healthcare Compliance a requirement for all companies that work within this very important area and Quality in manufacturing."

"For me in my role, it's just making sure I am aware of the intersection of my role in each and forming some great partnerships in the business to make sure we meet all our areas of compliance."

IDM: Are there any IT initiatives underway that will have an impact?

"The focus for me at present is in our IT environment, having completed 12 months of cultural acceptance on RIM in JJM. I



"I have had the opportunity to implement new IT RIM solutions in varied industries and it's never the software or technical capability that is the challenge – it is always the people element. Challenging the "but I have always done it this way" tendencies requires much background work, understanding of individual personalities and change management practices that suit the environment - having an Organisational Behaviour background will help!" - Angela Summers, Johnson & Johnson Medical.

am really focused on Vital Records protection and optimising our current applications before moving to new systems and solutions in the coming 2-5 years. The RIM strategy that I wrote in 2009 for JJM ANZ is integrated and dynamic with multiple initiatives running concurrently that support the overall 5 year plan whilst giving vision to how it supports our internal and external standards."

"One could say there is never a boring moment in RIM."

IDM: How are you providing an environment for collaboration and information-sharing?

"To give us long term collaboration and information sharing capabilities, we have utilised SharePoint as our collaboration environment."

IDM: Do you have challenges convincing a sales and marketing organisation of the benefits of records management?

"I suspect anyone would have challenges in this area if they took a conventional approach to RIM. From my perspective and coming from a marketing and advertising background in a previous career life, I positioned RIM pretty quickly in JJM as a "giver" not a "taker" of time. It's been a 12 month change management process to include small, incremental changes that provide benefit to the business but now I am in a position that as I move with some real hard hitting changes in the way we manage our information, that I have the support of key stakeholders in our company."

Angela is presenting a keynote session at the Liquid Learning 2nd Annual National Records and Information Officers' Forum 2011, 22-23 February 2011 in Melbourne.

Delivering document management for SAP

Organisations using SAP as a core business system should have a flying start in providing information contained in the database to decision makers through the transaction systems – but what about the information not in the SAP database? Abie Spies sets out the challenge.

Effective organisations runs on good decisions; good decision-making is dependent on availability of good information, and business information is usually contained in databases and documents. A well-implemented SAP system still only manages to capture around one third of corporate information in the database. A good two thirds of organisational knowledge floats around outside the database, and most of it is captured and stored in documents.

A major challenge for organisations is therefore to liberate the information contained in documents, and to deliver the right (and only the right) information in the quickest and the most effective way possible to whoever needs it. It stands to reason that a decision maker who has all the information needed at their fingertips in one system will be more efficient than one who has to hunt for information in different systems. Therefore, integrating document management and SAP systems, and providing access to the right document from within the SAP transaction will lead to increased productivity and more informed decisions. Fortunately for SAP users, this is entirely possible.

There are many options for SAP users to manage documents. Which one is 'right' for a particular organisation depends on many factors, not least of which is cost and efficiency. The following is an illustration of a number of options, and some of their pro's and con's. It is not an exhaustive list, but contains the main contenders.

Open Text Extended ECM for SAP

The solution currently recommended by SAP for consideration by its user community is the 'Open Text Extended ECM for SAP Solutions'. Open Text is one of the best known ECM suite vendors, and their products are well known and respected. For SAP users, Open Text makes sense over other third party systems due to its deep integration and strong alliance with SAP. SAP has a reseller agreement with Open Text, which allows SAP to bundle and sell these Open Text applications with standard SAP licenses.

The main advantage is that it is a safe choice. The systems are deeply integrated, and SAP's support means that tight integration and support will probably be maintained through new releases. Open Text is widely used outside the SAP arena, and the system will also cater for non-SAP users.

The Open Text solutions require significant additional licensing and infrastructure, but part of this may be offset against other SAP costs when purchasing licenses through the SAP licensing system.

In-built document management

One of SAP's best kept secrets is that it has excellent document management functionality in the core ERP application, with different modules designed to provide document management functionality for different document types. The modules that can be used to manage documents in SAP include:

The SAP Document Management System

SAP has an excellent document management system (the SAP DMS) contained in the core ERP application. Using it has three distinct advantages, namely

- cost – no additional license fees, maintenance cost, maintenance skills, hardware etc. required. It is available on every SAP GUI.

- Full robust document management functionality – everything you will probably ever need, including excellent version control, secure storage and access control, workflow, object linking to SAP objects, comprehensive search and find functionality etc.

- Full native integration in SAP, which means delivering documented information to SAP transactional users are intuitive, easy and reliable, particularly through SAP object linking.

The SAP DMS was developed primarily for management of technical documents (including CAD drawings), but is widely used for virtually any business process where documents need to be managed and accessed via object links.

SAP Easy Document Management

Any SAP user will know that it has been hamstrung by complaints about the usability of the standard SAP interface, and the SAP DMS was no exception. SAP responded by developing SAP EasyDMS, a Microsoft Explorer based interface to the SAP DMS that makes using and managing documents as easy as dragging and dropping files in Explorer. This is another 'in the box' application from SAP that is available free of charge for every SAP licensed user. SAP EasyDMS is strictly speaking not another application (it runs on the SAP DMS infrastructure) but the intuitive ease of use that it brings to 'non-SAP' users, while retaining the ability to link documents to SAP objects makes it a serious business performance enhancer.

SAP ArchiveLink

Despite the name of this module, it has great application in storing and retrieving documents that are not subject to change, like scanned documents, invoices etc. Used in conjunction with SAP workflow, great solutions are available for managing HR documents, accounts payable documents, photos etc. This functionality is also part of the standard SAP system, and carries no additional cost for licensed SAP users.

SAP Netweaver

While not strictly speaking a document management system, the 'SAP Netweaver Folder Management' functionality SAP unveiled in 2010 has distinct value for managing certain classes of documents in association with folders and other objects. It is essentially a re-badging of SAP's Records Management module, primarily in recognition that the module has much wider potential business application than just the narrow confines of records management. With Case Management becoming such a strong basis for many business processes, it allows business documents and information to be managed in folders in conjunction with many 'case related' processes, like CRM, SRM, grants



Abie Spies is founder and Managing Director of Engineering Informatics, a product independent Enterprise Content Management (ECM) consulting company. www.ei-anz.com

management, machine records etc. Depending on an organisation's SAP licensing structure, this product comes at a relatively modest additional cost to SAP users. The main advantage is the deep integration in SAP transaction processes.

Most ECM Suite vendors have document management systems that integrate to SAP to a greater or lesser extent. Popular stand-alone document management products include Microsoft SharePoint, Documentum, FileNet, and Open Text, but there are many more. These products are very successful at managing documents in a 'stand-alone' and 'best of breed' basis, but often lack thorough business process integration.

In recognition of the importance of integrating ERP and ECM systems, most of the stand-alone ECM Suites offer some level of integration with SAP. While it provides an ability to integrate ECM and ERP, organisations should be careful to check the extent and cost of the specific integration module, as some suffer from lack of specific functionality and version upgrade incompatibility, even though they may be certified by SAP.

Organisations going the route of implementing ERP Suites, do so for various reasons, including the perceived need for 'one central ECM system', need for specific and unique functionality, etc. Often the ERP and ECM drivers in organisations are very different, and therefore driven by different groups with different solution outcomes.

Whatever the reason for an independent ECM system, if organisations want to reap the benefit of delivering all the required information to decision makers seamlessly, they should pay particular attention to SAP integration during implementation of the ECM system. Great care should be taken to break down 'information silos' in organisations, and the seamless delivery of all required information to decision makers. The main advantage of stand-alone document management systems is their total independence from what happens with other systems in an organisation. The main disadvantages include cost (licensing, infrastructure, maintenance and other costs related to a major IT system) and lack of integration to business processes and systems.

Microsoft SharePoint

While SharePoint could be bundled into the previous category, it is becoming such a dominant technology; it deserves a mention on its own. SharePoint 2010 has significantly improved document management capabilities, and integration products to SAP are being developed by various organisations, such as iNet.DM of ERP-Link, which makes a solution based on a combination of the two technologies a very viable option.

The main advantage of SharePoint is its ubiquity and low cost; virtually every major organisation owns it as part of their Microsoft licensing. It is a great vehicle to extend document management deep into organisations where SAP is not used extensively. If not planned and regulated well, implementations tend to happen sporadically in silos in departments, which make it very difficult to regain document integrity on a corporate level.

Conclusion

The purpose of document management systems is in the first instance to deliver information when and where required. This requirement often gets buried and downgraded in technical wish lists when selecting ECM systems, but it shouldn't.

Integrating document management into SAP just makes business sense for progressive organisations looking to supply their business decision makers with all the information needed to take the best decisions. Which product an organisation selects is dependent on many unique factors, and there are many software products that may foot the bill. Before getting consumed by the technical decision, however, organisations should take a stance on the business process and business benefits a document management system brings, and make sure their technology decisions are driven by business imperatives.

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Council reengineers its future

The City of Whittlesea, in Melbourne's outer north, is striking success with a SharePoint strategy for document management. According to Whittlesea's Information Management Coordinator, Mary Ann Rosenthal, SharePoint is also helping break down the outdated 'silo mentality' and fostering collaboration across the organisation.

The City of Whittlesea first considered moving to electronic document management in the late 1990s. However the introduction of an EDRMS platform was abandoned in 2006 as it became obvious it was too costly and labour-intensive to implement.

The council was then left with the challenge of implementing a new document management platform. Like many organisations with a corporate Office license, SharePoint was the obvious solution.

"After a year working with Windows SharePoint Service (WSS), which is included with Windows Server, our achievements were such that we decided to purchase the full copy of Microsoft SharePoint Server 2007," said Rosenthal.

At the same time, Whittlesea took the opportunity to broaden the focus of what had become a very narrow system-based project to include the human aspect of the change required. This resulted in the Information Management Program, which is now underway.

This program aims to instill good information management practice among staff as SharePoint is deployed across the organisation. Its primary intent is to help people to work better. Specifically, it aims to maintain or improve productivity while establishing a clean and disciplined information management environment.

"Some business areas are using SharePoint more extensively than others," said Rosenthal. "One example is a program to manage local boarding houses that involves both the building services and the health services departments at council."

"Previously they would have to send Excel spreadsheets back and forth, whereas now they can each update separate fields in SharePoint. Our marketing and communications unit is also able to access this site for reporting to our CEO. SharePoint is breaking down the silo mentality and introducing real collaboration between separate business units."

Resolving information management issues

Council staff are always under pressure to deal with ever higher volumes of transactions and associated information. One of the key considerations in acquiring SharePoint was providing staff with facilities to help them better manage problem areas, as a trade-off for better managing their information.

SharePoint's extensive out-of-the-box functionality allows rapid development of solutions that form the starting points for the organisation's various departments on their journey into a more formalised information management environment.

- At the City of Whittlesea this has begun to deliver:
- Team management sites for units in the Health area;
- A corporate image library;
- A governance portal containing a wide range of compliance, decision-making and reference information;
- Birth and medical documentation for the Maternal and Child Health unit; and
- An online library of engineering plans.

"Our early attempts at implementing an electronic document management system taught us an awful lot about the way the organisation uses information," said Rosenthal. "We didn't just buy a system and plug it in. We realised it's really all about culture. You can have a whizz-bang multimillion dollar set up, but if your staff don't want to manage information well, it won't happen."



"The information management team has been working on what we call the 'Good Practice Project', which involves cleaning up the network drive, archiving electronically and running awareness sessions. We are in people's faces all the time. Every member of my team knows just about everybody in council. People are now ringing us about information management issues, which is really good."

Improvement, not duplication

"Like any Council, our major business is planning and building applications. Whittlesea is still in the process of implementing electronic workflow. At present plans and applications can be submitted electronically, however these are then printed out and kept on a paper file."

"We are actually looking at process, which takes a lot longer than just implementing an electronic document library. Rather than just duplicate what is happening with paper, we want to improve the process," said Rosenthal.

Some electronic processes in prototype include food sampling, freedom of information, junior sport and cultural grant applications. These areas represent a step up for Whittlesea in terms of their level of sophistication. They include the use of InfoPath to create online forms that replace existing paper forms. These online forms are captured as part of the set of digital process documentation.

Civica has announced integration of the local government ERP platform with SharePoint but this is yet to be delivered.

Whittlesea is looking to implement an electronic archive with the arrival of SharePoint 2010, and is exploring options to deliver VERS compliance in 2011.

As with any organisation, managing email is a real issue. Staff have two choices, print it out or save it to a separate drive in a structured area.

"It's about culture and risk management. We don't expect staff to save every email, just when they record evidence of a transaction," said Rosenthal. "With SharePoint 2010, it will be much simpler to get email into SharePoint."

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international speakers coming to this event, all of whom will be showcased on the website over the next couple of months.

Conference Format

Following the 2010 SharePoint conference format, proven highly successful over four other conferences throughout the Asia Pacific region, (the most recent last month in Singapore attracting over 560 attendees), the 2011 SharePoint conference comprises three tracks, including:

Business Sessions – level 100 and 200 for those wanting to explore the business aspects of SharePoint functionality, features and how they are used in a Business Context.

Technical Sessions – these cover right from 100 beginner level through to deep dive 300 level technical content for developers and IT Pro's. There are two concurrent technical tracks, to ensure we deliver the best range of content, covering SharePoint and other related technologies

Voice of a customer – these are case studies from the field – as SharePoint evolves, customers have some great stories to share, that everyone else can learn from and these sessions are very popular. (Also, if you as a Customer have a story to share, please let us know!)

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SharePoint workflow smartens up

Organisations everywhere are exploring solutions to automate enterprise business processes using SharePoint. Here are two smart examples of at Queensland's Redland City Council and the Brisbane Catholic Education Office.

There are 1000 users at Redland City Council, working in Windows XP and Office 2007. Enterprise applications include Technology One's financials, property and document management (Dataworks) suite as well as Aurion HR, ESRI GIS and Maximo Asset Management.

SharePoint has been providing the council's intranet and internet platform since 2001, and is now driving a number of external sites at www.redland.qld.gov.au and www.indigiscapes.com.au.

It has been used to drive small team collaboration solutions through to a full custom solutions – Corporate Directory, Capital Works System, and Environmental Management. In 2008 Redland deployed K2 Blackpearl to provide a Business Process Management solution that was tightly aligned with the Microsoft Platform.

Stephen Alderman, IM Enterprise Architect at Redland City Council, said, "The solution needed to have advanced features and support a wide range of end users that would build workflows, from our in-house Visual Studio developers to power users within the organisation. Council has thousands of processes and our goal is to analyse and centralise as many of these as possible, the end result being efficient, consistent, cost saving, productive processes.

K2 workflows are now incorporated into any new in-house Visual Studio development that requires workflows. All SharePoint solutions that require workflows are built using K2 by Business/Systems Analysts or power users.

"We believe business processes should be managed in a consistent manner regardless of whether it is created as part of a full software development lifecycle, or it is designed by a BA or power user for SharePoint," said Alderman.

"K2 gives council a flexible approach to BPM that we have been unable to achieve with other products. A SharePoint workflow can be developed in K2 studio by a power user, tested and deployed in one day. The same K2 product is also part of our Visual Studio software development lifecycle for projects that are more complex."

Brisbane Office of Catholic Education

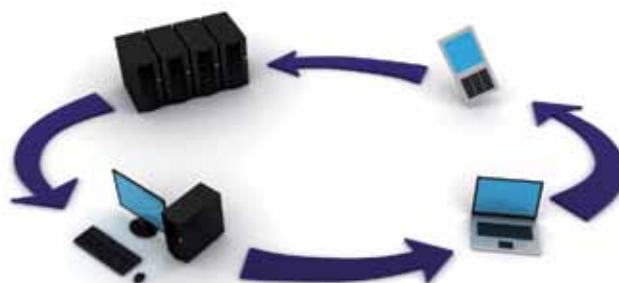
Brisbane Office of Catholic Education turned to Nintex to assist with a project to automate mailroom scanning and incoming document workflow. SharePoint was rolled out in 2009 to provide a united Enterprise Content Management platform for schools in the Brisbane Catholic Education system. In early 2010 the organisation moved to implement a mailroom automation platform including Kodak i420 scanners and workflow automation created by Nintex.

Seeking to gain some major cost savings by replacing the manual mail handling process, it made sense to implement the mail workflow on SharePoint, which was already being used for collaboration and document management. The solution reduced mail and courier costs, and introduced an ability to apply formal records management policies to categories of incoming mail.

Mike Fitzmaurice, vice president of product technology at Nintex, has been involved with the evolution of the SharePoint platform while working at Microsoft.

He said no workflow is typical, but the solution developed for Brisbane Office of Catholic Education is a good demonstration of the capacity for SharePoint to extend beyond its initial role in an organisation.

The mailroom automation solution involves scanned documents being processed by Kodak's Capture Pro Software, which performs



optical character recognition (OCR) to assign specific text to determine metadata properties of the resulting PDF document.

"There were some challenges to implementing this project," said Fitzmaurice. "Sometimes if the Kodak scanning software wants to drop something into SharePoint, it wants to pretend it's a string or text, if it's a date or currency then it will have a problem delivering it properly.

"In this case, Capture Pro was to image the document and OCR it, then pluck pieces of OCR text which are assigned to metadata properties of the resulting PDF."

Once the document has been scanned and OCR'd by Kodak Capture Pro, it is delivered to a SharePoint document library which has fields setup to receive metadata captured by Kodak Capture Pro. Nintex Workflow 2007 was used to create series of simple document workflows for scanned mail, using its drag and drop workflow designer functionality. Data is first cleaned, then secured so that only the intended recipient has access to it.

This recipient is notified, then a log is created to track what happens with each individual piece of mail. The work was done by OBS, an Australian Microsoft partner and system integrator, as well as a Nintex partner.

Out of the box workflow

Luke Shaw, Director, Professional Services of Queensland-based solutions provider Efficiency Leaders, believes the release of SharePoint 2010 has provided more out-of-the-box capability for workflow automation.

"Under previous versions of SharePoint, most of us would agree that 3rd party add-ons were essential for those wanting a simple and graphical interface for workflows. There are still great opportunities for these tools with SharePoint 2010; however Microsoft has really raised the bar, by greatly improving the user experience and simple design process. So if you want workflows that communicate with people through tasks and e-mails, or more advanced workflows, SharePoint 2010 and associated tools are worth a real look," said Shaw.

The new tools for creating workflows cater for all levels of users wanting to create and map workflows. These include Visual Studio 2010, SharePoint Designer 2010 and Visio 2010. The new features of SharePoint 2010 make it more robust and applicable to solving a wider variety of workflow problems.

Efficiency Leaders is currently using these Microsoft tools to develop and automate workflows for government organisations, ASX listed companies and various other companies across a wide range of sectors. Some of the workflows include accounts payable automation and mailroom automation.

Fair Work Ombudsman sets out on EDRMS search

Implementing enterprise search and an EDRMS are high up the agenda in 2011 for David Sunderland, Director, Information Management, at the Fair Work Ombudsman.

The FWO is a new federal government body created by the Fair Work Act in July 2009 that combines the previous Workplace Authority and Workplace Ombudsman.

The FWO is charged with the practice of assessing and checking compliance while also conducting an ongoing education program for Australian workplace participants. It works out of 53 centres nationally with around 1000 staff.

Sister organisation, Fair Work Australia, is the tribunal arm that, among other things, sets minimum wages and employment conditions and manages dispute resolution.

The FWO's IT infrastructure and desktop and server platforms are provided by the Department of Education, Employment and Workplace Relations, which is currently rolling out the Windows 7 desktop OS to replace XP together with an upgrade to Office 2007.

The workload is immense. Since July 2009, Fair Work Infoline advisers have spoken with more than 1.3 million employers and employees, including direct contact with around 250,000 to 350,000 small businesses.

It has created 11 Best Practice Guides dealing with a range of workplace matters such as work and family, small business, and managing underperformance, with 120,000 downloaded.

The Fair Work Ombudsman has also been busy creating template employment documentation and letters for use by small business. More than 360,000 were downloaded in the year to 30 June 2010. There were 170,000 downloads of the pay slips and leave record templates; 80,000 of the performance management templates; and 55,000 of the employment engagement templates.

Inspectors engaged by the States completed 18,000 educational visits with a target of 50,000 to be completed in the next two years.

Nationally, fair work inspectors finalised about 21,000 underpayment investigations last year, recovering more than \$26 million for over 16,000 employees. About \$4.9m of that was recovered from targeted compliance activities (which included around 3400 audits). The courts finalised 56 penalty matters, imposing fines of just over \$2m.

A new case management system, Nexus, built using Microsoft Dynamics CRM has recently been developed to handle most of the functions of dealing with claims for underpayment, etc.

Most FWO staff save documents to a shared drive or an ageing document management system called 80/20 Document Manager, which was developed in Australia and now owned by SAI Global.

"You can provide document links to 8020 documents in email which is a popular way to share information internally," said Sunderland.

"Search is a problem; we can't look across the business system, shared drives and our existing document management system. That's a real key delivery of the EDRMS, to implement true enterprise search across the various repositories that we have.

"We are looking at FAST search to be the solution; it looks like it's ticking the boxes for functionality and integration."

DEEWR is in the process of implementing Enterprise Vault for Exchange email archiving, however records management for the FWO involves printing out emails and storing them as paper files, with TRIM as the record-keeping system...

"Our new claims system has more automated links to TRIM, which is our record-keeping system for paper records, and we are actively looking at TRIM as being part of our EDRMS solution. TRIM has a real records focus so is not suitable for our general users to use for their daily document or records management activities".

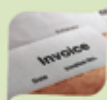
FWO is instead planning to explore the use of SharePoint for document management and has recently upgraded its intranet with SharePoint 2007. Both the Workplace Ombudsman and the Workplace Authority had separate SharePoint 2003 intranets, but they had not been used for document management.

"The change to SharePoint 2007 was reasonably rudimentary, there wasn't a whole lot of rebuilding or redesigning required. There is a project underway now to recast the intranet into a SharePoint 2010 environment with a more fundamental review of how everything operates.

"We want it to be as automated and as rules-driven as possible and we are hoping TRIM 7 and SharePoint 2010 together with FAST search will deliver us that."



"It is really important to us that record-keeping is done well but as much as possible is transparent to users."
- David Sunderland.



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Knowledge rules at Comcare

Knowledge Management arrived as a discrete discipline at Comcare in 2010. IDM asked Alyssa Blackburn, Director, Knowledge Management at the federal agency, about the new role and future challenges for knowledge and information sharing between just over 600 staff.

IDM: Alyssa, What does your role as KM Director, at Comcare encompass?

“This role is responsible for Comcare’s knowledge management strategy, information management framework and practices. Knowledge Management enhances the capability and capacity of Comcare people to acquire, use and share information. This supports evidence-based decision making and improved business performance in Comcare through improved knowledge management.”

IDM: How was this handled before the creation of a specific Knowledge Management function in 2010?

“Disparately. We have information and knowledge pockets across the organisation, but nothing that was managed as part of a knowledge management framework or strategy.”

IDM: Are there any initiatives underway that are changing the information systems environment?

“We are looking at the way we share, use and manage our information rather than changing our systems. The harmonisation of work, health and safety laws is a really good example of this. “Australia is moving towards national work health and safety laws and we need to be able to share and access information across

jurisdictions, across Australia.

“In addition to this, government policy to deliver a more citizen focussed service is also in our minds as part of a changing information management environment. We want our information to work for us to deliver a high quality service to all of those in our community, especially those that have been injured in a workplace incident.”

IDM: Alyssa, can you provide a brief description of the information management challenges at Comcare.

“Collaboration is probably the biggest issue facing us at the moment. This includes looking at how we collaborate both internally and externally with our stakeholders and partners. To contend with the collaboration challenge, we have begun an environmental scan of the organisation to find out what their needs were and how we could meet them. We did this in conjunction with our Online Services area which is part of Comcare’s Community Engagement team.

“While the environmental scan has been underway, we began investigating tools we could incorporate into our existing environment. We use My Source Matrix as our intranet platform and need to ensure that any tools we implement will integrate seamlessly with this.

“Our initial plans are to develop an internal wiki called “Compedia,” along with discussion forums and topic related blogs. We’re hoping to pilot these tools with one of our virtual teams early next year.

“To ensure we meet the requirements under the FOI Act publishing scheme, we’re also looking to implement a TRIM bridge to My Source Matrix so we can publish straight from the source rather than maintaining copies.

“Following this, we will start investigating the implementation of Communities of Practice, COMMunities, to harness and share the wealth of information and knowledge we have in the organisation.

“Having a single source of truth for our information has also been a challenge, but we’re moving in the right direction here, with the development of a business intelligence and data management strategy that is instrumental in putting governance for our data into place.”

IDM: How is Comcare moving to remove paper from its information workflow?

“Currently, Comcare does use a large amount of paper based forms. When these are completed and returned, they are scanned into the compensation



Comcare has a team of people at our Records and Mail Centre who are responsible for scanning all compensation claim records that come into the organisation and attaching them to the correct claim file.



"Knowledge Management is a new area in Comcare and we're an enabling area for the rest of Comcare to capture, share and use their information and knowledge. We aim to give the organisation the tools and processes they need to do this. We're currently developing strategies to manage our explicit and tacit knowledge." - Alyssa Blackburn

management system (PRACSYS), and handled electronically throughout Comcare.

"The Claims Service Officer receives a notification in their in tray through Pracsys, that there is a new document to be actioned. After the initial scanning, the whole claims process is managed electronically.

"TRIM (Comcare's electronic document and records

management system) sits behind this ensuring that the documents are captured appropriately and can be retained for as long as they are required. Pracsys and TRIM are seamlessly integrated so in many cases our staff don't realise they are using TRIM at all.

"Further to this, Comcare is currently investigating a number of initiatives to provide more online services eliminating the need for so many paper based forms.

IDM: What are the risks associated with overlooking your information as an asset: what can go wrong?

"Comcare is an information and knowledge based organisation and this information needs to be treated as one of our strategic assets. The risks of overlooking this are significant.

"We need to make informed, evidence based decisions and we can't do this without the appropriate information. Comcare provides services to people following significant injury or illness, and those workers should have every reassurance that we are making appropriate decisions to support them during difficult times.

"Given the nature of our work, Comcare holds very sensitive material and this needs to be managed appropriately to ensure the privacy of our injured workers and other stakeholders.

"Changes to FOI legislation also mean that we will be publishing more information than ever. We need to ensure we can quickly and easily identify the right information, in the right format so it can be made available to the public.

"This is where something like a TRIM bridge is really important to us, as we can ensure we're publishing the right information in appropriate timeframes. We also need to ensure we have good infrastructure in place to support these reforms. This includes good search capability so information is easy to find and access, as well as things like load times and accessibility."

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A Fuji Xerox solution at Australian Container Freight Services (ACFS) is delivering a payoff throughout the entire document lifecycle.



No company better understands the damage inflicted on international trade by the global financial crisis than Australian Container Freight Services (ACFS). The company, established in 2005, provides supply chain logistic solutions for clients around the world, and saw first-hand how the GFC dampened imports and exports, but despite this, has enjoyed solid growth since its inception.

ACFS had reached an impasse in its ability to deliver timely, accurate services to clients due to its administrative procedures. With warehouses located in Melbourne, Sydney and Brisbane, and with plans to expand into South Australia and Western Australia, the company recognised that it needed to devise a scaleable documentation solution that would not only match its rapid growth, but would provide better communications and documentation for its clients.

This would require a major overhaul of its administration processes, and a more transparent method of tracking its operations.

Document focus

With an e-business initiative under way, ACFS required a documentation system that would not only maintain rapid and accurate transaction records for clients, but also incorporate a simple but highly effective means of tracking clients' goods at any time, giving them a clear indication of the location of their goods, as well as delivery expectations.

The documentation system in use at ACFS required staff to manually enter data into the invoicing system, print three copies of each invoice and post copies with supporting documents to clients for payment.

The system did not archive all these invoice entries, so each

invoice had to be manually re-entered and recreated every time a change was made. It's little wonder that inefficiencies and mistakes were a common administrative problem at ACFS. This system had to be completely reinvented electronically if the company was to remain competitive.

IT manager Hong Liu and the ACFS management team had previous experience with Fuji Xerox multifunction devices (MFDs). They approached Fuji Xerox Australia with a request to automate proof of delivery documents to clients, along with as many of the company's document processes as possible, particularly in invoice processing, which hampered the company with significant internal delays and errors.

ACFS NOW RECEIVES DOCUMENTS WITHIN
FIVE SECONDS OF SCANNING, A PROCESS
WHICH USED TO TAKE UP TO A WEEK.

"Our document management processes were manual, time consuming and inefficient," Hong Liu said. "We decided to invest in our administrative processes as we knew that automating our manual systems could help us streamline our inefficient processes.

"We were looking for a document system that would not just manage our documents electronically, but also enable us to upload proof of delivery documents to a web portal, giving our clients more visibility.

"We wanted to apply smart improvements in the various stages of our document cycle, such as automatic job registration through optical content recognition. We also wanted a long-term solution

which aligned with our existing IT infrastructure that still gave us enough flexibility to meet any future needs we might have," he added.

ACFS's administrative problems extended beyond paper-based proof of delivery documents. After analysing ACFS's complete administrative system, Fuji Xerox Australia's Office Solutions team discovered that similar inefficiencies existed in numerous other essential processes in the system, such as job registration.

"Fuji Xerox Australia proposed a solution to re-engineer our administrative processes to make them much more efficient. As a fairly new company, we took the opportunity to address these challenges so that they work for us as the company grows.

"Our ultimate aim is to work toward an integrated solution that manages the life cycle and delivery of our documents, and this is a crucial first stage of that process – setting up the infrastructure," Hong Liu said.

Document lifecycle

Fuji Xerox Australia analysed ACFS's entire document system and soon found inefficiencies throughout the entire lifecycle of documents. It recommended integrating a suite of software solutions, including EzeScan and Planet Press Suite with DocuShare, a centralised web based document management system.

Richard Melville, Software Solutions Specialist, Office Innovation Group, at Fuji Xerox Australia, said, "ACFS wanted to be able to upload invoice and proof of delivery documents to their website, and when we talked to them we found there were a few more problems with how they manage their documents; such as how they create their documents and the processes they use to inject the documents back into the system to be able to put them onto the website.

"We consulted on how their documents were generated, and suggested putting them into a format that they didn't have to print to deliver, along with the ability to put a barcode on each document and check for signatures when those proof of delivery documents came back from customs. We suggested that they archive documents in DocuShare so they had their own audit trail. This would help to automate the process as much as possible," he said.

"Fuji Xerox Australia was able to provide us with a more complete solution that offered value across our supply chain," said Hong Liu.

"At one stage, we considered outsourcing or implementing a solution commonly used in the freight industry, but recognised that Fuji Xerox was able to provide a more effective and strategic solution for our needs.

"Not only was the proposed solution able to fully integrate with our existing infrastructure, it could provide us with flexibility in document design, workflow control, and process automation."

Workflow essentials

The EzeScan solution, combined with Planet Press, automates information capture to improve workflow efficiency. It transforms content on hard copy forms such as invoices so that data can be automatically retrieved and processed as a set of predefined requirements. This is made possible through the use of data recognition technologies.

When ACFS customer invoices are uploaded through EzeScan the necessary presence of sign-off is checked, email and fax details are detected, the invoice is barcoded, and the invoice is automatically sent to customers.

This saves staff time in creating multiple copies, and emailing or faxing manually. This solution also manages unsent documents,

and alerts are sent through real-time notification emails to staff.

Fuji Xerox's DocuShare document management system allows ACFS staff to save, archive and easily retrieve documents, instead of spending time searching for and recreating them. Staff can access documents at any time at PCs and at the MFD, scan and print at the MFD and save directly into the DocuShare document management system. Doing this reduces the amount of information stored in email data and personal computers.

"Fuji Xerox Australia has an excellent track record for providing consistent support, and that was a high priority for us," Hong Liu added.

"Support through the installation phase by Fuji Xerox Australia has been excellent. As a long-term strategic supplier, the team continues to propose ways that we can improve our processes to achieve our goals, adding real value to our company."

MFD Central

The solution enabled ACFS to streamline its client communications through the use of multi-function devices, which could upload documents as they are created and build a digital audit trail of all the necessary documents for the handling of goods.

It was central to ACFS's ongoing success that digital documents could be placed in an online portal so that clients could easily check accounts and invoicing, see the progress of their goods in real time, and maintain constant track of the status of all the approvals needed in international trade.

Delivery dockets, gate passes and invoices can now be uploaded directly from a multi-function device to ACFS's existing supply chain management system. The company no longer needs to process job information manually, generate documents, print and then mail them.

This fundamental shift in operational efficiency has removed a huge administrative burden from ACFS staff, and improved the accuracy of their performance enormously. A massive amount of paper-based documentation has been removed from the system, improving archives, saving a great deal of time and significantly speeding up processes, especially in dealing with clients.

"Previously, our administrative processes were very paper intensive,"

Hong Liu observed. "However, with the new solution in place we're taking advantage of email systems which automatically email documents once all the relevant data has been entered.

"We no longer need to print invoices and proof of delivery documents and then mail them to our clients. We are 100 per cent confident that the captured data is correct. In addition, the capture of information is handled remotely at our warehouse sites, which also means that we save on postage and associated costs," he said.

ACFS is now able to ascertain the accuracy of invoices and approve them automatically and quickly.

Accountability to clients is assured, as is prompt attention to particular jobs, because they are instantly retrieved and checked. Clients are able to view information on freight logistics in real time and track their goods instantaneously through the use of barcodes on all documents.

"The greatest benefit of Fuji Xerox Australia's solution is the increased visibility of the various stages of approval within the organisation's processes.

"Our clients can now access our website through a secure login, and instantly see exactly where their invoices or goods are, and when it will be delivered to them. Our business is in the handling and delivery of goods to clients, so this really gives our clients more visibility and peace of mind."



"We are definitely seeing benefits both in staff efficiency and in increased client satisfaction. We look at this solution as a strategic building block, with the aim of growing the solution into the rest of our company, as well as our logistics and supply chain verticals to achieve similar results in these areas." It Manager Hong Liu.

Image science helps DEEDI in fire ant fight



Biosecurity Queensland is leading the war against the fire ants, which scientists believe could quickly threaten other parts of Australia if the pest is not controlled.

More than \$215 million has been invested in the national cost-shared eradication program to find and destroy fire ants, stop their spread, inform the public about their impact, and conduct research on ways to most effectively destroy their colonies.

Biosecurity Queensland is active in the community and industry, working with residents and businesses to ensure people know how they can contribute to the eradication effort by reporting suspect ants and not moving materials that could contain fire ants. The production of accurate, attractive, informative materials is an important element of this engagement effort.

The fire ant fight is just one of the campaigns undertaken by Biosecurity Queensland to protect Queensland from pests and diseases and manage animal welfare standards.

Whether it's fire ants, locusts or any other scourge of nature, being able to identify and source images for public education and ongoing research is essential.

Biosecurity Queensland is an agency of Queensland's Department of Employment, Economic Development and Innovation (DEEDI), which is involved in a long-term project to manage a vast database of primarily scientific images collected by the former Department of Primary Industries.

When a campaign requires a picture of fire ant infestations or a locust plague, it is likely to be found sitting among the many terabytes of images stored on drives across the state, or in a filing cabinet somewhere as a slide or transparency.

DEEDI Director of Information Management, Heather

Drummond, initiated a project to manage the department's vast image resources, and in 2008 implementation of the Cumulus Digital Asset Management (DAM) system began.

Cumulus distributor DataBasics worked with the project team and IT staff to configure the system, streamline the workflow and train users over a period of three months. DataBasics provided consultation for the initial project and ongoing support post implementation. The Cumulus DAM enterprise server installed at DEEDI, one of only four in Australia, offers full read/write access to the Cumulus server via web browser, and is tightly integrated with the Open Text CMS.

DEEDI is now considering an upgrade to the latest version of Cumulus, i.e. version 8, which will be a joint project with DataBasics to validate the new product version with the DEEDI infrastructure and IT departments.

"There are so many images we have that can be of value to researchers, and useful for our publicity campaigns, if only they can be found," said Heather Drummond, Director of Information Management for DEEDI.

"People spend a lot of time chasing images and we often end up commissioning people to shoot images that we already have.

"One of our divisions in Brisbane could have 12 scientists with access to a couple of thousand slides stored locally, but if we can digitise them they could be used by hundreds of other scientists across the state."

Scientists may also use the images as a part of their diagnostic

process – by using the images to identify any diseases that may be found on crops.

Before implementing the digital asset management system the department undertook a series of focus groups which identified the need to have a full scientific taxonomy apply to metadata that describes the images.

Project Manager Judith Turnbull said implementing a taxonomy and setting up the digital asset management system was only phase one of a much larger project. The process of scanning tens of thousands of hard copy images, and transferring digital images from shared drives with the correct metadata, is a massive project that required additional resourcing.

“There was also a risk to the department from not being able to identify copyright with images we used,” she said.

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“We are training staff to begin importing images into the digital asset management system in the right way, but most simply do not have the time to go back and apply the process to the huge volumes of historical images that go back to the beginnings of scientific research in Queensland.”

Turnbull estimates the job of transferring that huge archive of images could take several dedicated and qualified staff more than a year to complete.

“Early projects have already shown that the review process will identify a large degree of duplication in images stored. One server that had to be retired had over 75,000 images but we culled that to around 30,000 when we processed it. So we would expect the 4 million images we have across the department’s servers could come down to 1.5 million.”

The import process is assisted by an Excel spreadsheet that is repopulated with the correct taxonomy terms, and then applies these automatically across a folder as it is imported.

To begin the enormous digitisation project, the department has acquired a Hasselblad bulk slide scanner, able to process 50 slides at once. However, this still leaves a formidable task to import thousands of slides.

“We hope to get to the stage where we can begin using more features of Cumulus, including the ability to automate the importation of images with the associated metadata from “Watch” folders on the network.

“Cumulus gives us state-wide access to images over our intranet, which is essential as we wanted to ensure staff working in Townsville had the same experience as those based in Brisbane.

“It also provides the ability to view thumbnails stored with the image which can be dragged and dropped into Adobe Photoshop or InDesign.”

The Cumulus project was started by the Department of Primary Industries and Fisheries, before that department was merged into the new Department of Employment, Economic Development and Innovation (DEEDI).

DEEDI also incorporates mining, energy and tourism, and each has its own approach to digital asset management.

The development of a unified image management strategy across the department is another challenge that will have to be met, in conjunction with the DEEDI network integration, which is already under way.



The battle against fire ants in Queensland’s southeast is in its 10th year, with the pest invading backyards, sports fields and rural properties in Brisbane, Ipswich and, more recently, the Gold Coast.

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DECCW finds space with NetApp

Growing use of spatial technology and satellite imagery for line of business applications has led the NSW Department of Environment, Climate Change and Water (DECCW) to overhaul its storage platform with NetApp.

The DECCW has consolidated its existing, multi-vendor storage environment under the NetApp V-Series heterogeneous storage solution.

NetApp was engaged to redesign its storage environment due to the increasing volume of information requiring backup and storage. With around 4000 staff employed in 200 branch offices across NSW, the DECCW's multi-vendor legacy storage system was reaching the point where it was difficult to handle the increasing growth in storage requirements.

David Schneider, Director of Information Management and Communication Technology for the DECCW, said, "Our data storage requirements continue to grow almost exponentially, so we were looking for a flexible, scalable storage solution that was able to keep up with our growth and meet the high-availability requirements of our dispersed workforce."

"With the V-Series, NetApp offered us a high-performance, vendor-independent, unified storage solution which is simpler and easier to manage than our old system. NetApp has allowed us to work faster and improve efficiency, enabling us to more effectively meet the needs of our internal and external customers."

In the past, to manage the expanding data storage requirements, the DECCW added more storage capacity as required. This was becoming unsustainable, particularly as backup reached capacity very quickly. Backups were also being duplicated across multiple sites, further exhausting the system.

A key element of the solution for DECCW was 100 x NetApp FAS storage systems to be installed across DECCW's branch offices around the state. As part of this, NetApp has introduced data deduplication technology to reduce the amount of data being stored to disk, streamlining the backup process and reducing the amount of data being sent over the network. Snapshot technology was also introduced to improve efficiency and enable frequent point-in-time backups. These technologies helped solve the need for increasing storage demands, limiting the amount of storage space required and greatly improving disaster recovery capabilities.

David Schneider said, "We chose NetApp for several reasons. First, the NSW Government has undergone an ICT expenditure review, which puts pressure on all departments to seek ways to operate more efficiently. The NetApp solution offered us results for a very competitive cost, thereby helping us to meet our targets."

The NSW DECCW is deploying two NetApp V3160HA storage systems at its head office and 100 NetApp FAS2020 storage systems at branch offices across the state.

Snapshot technology will enable DECCW to protect its data with no performance impact and minimal consumption of storage space. SnapManager for SAP, SnapManager for Oracle and SnapManager for Microsoft Exchange are automating complex, time-consuming processes associated with backup and cloning of these applications.

NetApp Operations Manager is delivering comprehensive monitoring and management. NetApp Protection Manager automates data protection operations.

NetApp SnapMirror replicates data from DECCW's Sydney-based primary data centre, to its western-Sydney-based back-up data centre, protecting business-critical data.

NetApp FlexVol lets DECCW adapt quickly to changing storage needs, allowing the storage team to create and resize virtual volumes quickly, so storage can be added where and when it's necessary without disruption.

NetApp FlexClone is deployed throughout DECCW's development and testing environment.

Also, we needed a partner who could help us embrace web 2.0 and manage the growing volumes of data being generated. NetApp has provided a solution that has enabled us to solve several business issues we were facing, and offers us the potential to generate significant business breakthroughs in the coming years. We expect the new solution will provide a substantial return on investment once the installation is complete, further improving our ability to consolidate data and significantly improve our disaster recovery and IT service capabilities."

Peter O'Connor, Area Vice President for NetApp Australia and New Zealand said, "NSW DECCW is a great example of a customer who needed a simple, effective solution to generate significant improvements from its legacy storage environment. NetApp is pleased to be able to work with NSW DECCW and help the organisation leverage value, speed and efficiency from its existing infrastructure."

The NetApp solution will be rolled out in phases and is expected to be completed in two to three years, with 60 x FAS systems being implemented across NSW by the end of 2010.

Qld State Library opts for RecFind 6 EDRMS

The Knowledgeone content management solution RecFind 6 has been chosen by the State Library of Queensland to manage its physical and electronic records.

The State Library is the primary custodian of Queensland's documentary heritage. It is also a significant partner with local government to provide library services for over 340 public libraries and Indigenous Knowledge Centres.

According to State Library Project Officer Gayle Walters, "The State Library of Queensland has decided to implement RecFind 6 as the product that best meets the business requirements of the organisation at this time. Staff members are looking forward to an exciting implementation and improved records and document management across our organisation."

CEO Frank McKenna said "We are excited and extremely pleased to have an esteemed organisation like the State Library of Queensland as a customer. As befits the county's top library organisation, it has stringent and exacting requirements that we were able to meet with our RecFind 6 product suite and service offerings."

Open Text acquires StreamServe

Open Text has acquired a platform for document assembly and delivery that is tightly integrated with SAP, after purchasing StreamServe for \$US71 million.

StreamServe's software provides for automated creation of documents through rules-based dynamic assembly able to be presented on paper or electronically.

It integrates with ERP and supply-chain systems and applications, including SAP. Open Text and SAP have a 20-year partner relationship, and SAP resells a wide range of Open Text ECM solutions. Like Open Text, StreamServe has an established reseller partnership with SAP.

Paperless push pays off for ODPP (WA)

Police briefs that could run up to 10,000 pages were causing headaches for the Office of the Director of Public Prosecutions (ODPP) for Western Australia, which has found relief in a paperless workflow utilising Kodak scanners and EzeScan software.

The ODPP is responsible for the prosecution of all accused people charged with indictable state offences in WA's higher courts. State Prosecutors employed by the ODPP undertake high profile criminal prosecutions, in jurisdictions from the Magistrates Court, and Children's Court up to the High Court of Australia.

The ODPP must deal with a huge number of documents of varying types. This can include letters, court documents, police briefs and other associated evidentiary material. By far the largest volume of documents are the police briefs which contain witness statements, transcripts, exhibits, certificates, forensic reports, incident reports, bail papers and other types of police material.

Depending on the complexity of a prosecution case, these vary in size from 250 pages to 10,000 pages.

When you factor in that the ODPP receives over 3000 police briefs per annum, the challenges of managing paper-based records become apparent. On the frontline dealing with this mass of paper documents are six records management staff that now create files, index, scan and catalogue documents into the ODPP's electronic records system.

The ODPP began a move to electronic records in 2009 with the acquisition of HP TRIM CONTEXT 6.2.4. Scanning of Police briefs and associated documents began in February 2010 using three Kodak i1440 scanners

"While our Kodak scanning equipment could scan the associated documents into a single PDF document, this would not provide flow-on benefits to our paralegals and prosecutors," said Valter Guarino, Manager Records at the ODPP.

"We wanted ODPP staff to have faster and convenient access to records, without the need to rely upon the paper based files."

Other priorities included improved accountability, transparency, timeliness and security of records. To this end, the ODPP initially began using EzeScan software to assist with the scanning of various documents, using barcoding, zone recognition and purpose designed job templates. This provided improvements in efficiency, accuracy and timeliness.

Guarino then approached Outback Imaging to discuss a solution for dealing with police briefs. A solution was developed based upon predesigned barcode sheets that divide the Police Brief by the various different document types.

These sheets also provide the information used to title the

individual documents in HP TRIM.

The sheets also trigger different indexing questions for the specific document type, with all default metadata automatically applied by EzeScan by undertaking a database reference to the ODPP's form information database.

"We proceeded to test the EzeScan application on various briefs and we quickly found that the solution was workable and would provide the organisation information in the required structure and formatting," said Guarino.

"Using the barcode sheets and zone recognition through EzeScan, we reduced keystrokes and improved accuracy. The EzeScan solution from Outback Imaging perfectly suited our needs.

"It was a simple deployment with out-of-the-box connectivity with our Kodak scanners and HP TRIM."

"The use of barcode cover sheets which contain the TRIM folder number and the document type in the brief has now been expanded to scanning other documents. At present we are using 25 of these sheets. This solution has increased our productivity and improved timeliness, and we are now looking at enabling other divisions of ODPP to use the technology to help our business in the battle against paper.

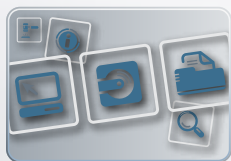
"The Support from Outback Imaging has been excellent, whenever we have needed a hand to create a new workflow or transfer a license they have been very professional with quick responses and quality of service."



Large police briefs, such as these being conveyed by e.law, are still trundled to and from court on trolleys. The Office of the Director of Public Prosecutions (WA) is liaising with the WA Police and Courts on transfer of information electronically.

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Fair slice of the salami

How do Australian courts deal with the duty of corporate record-keeping in practice? David McGrath finds that “it depends”, as two recent cases showed very different outcomes.

The first of those matters was the successful prosecution by the NSW Food Authority of Primo Smallgoods which resulted in fines of \$34,500 and headlines around the country. The failures of Primo's record keeping systems were a key component of the regulator's case against Primo.

The Primo group is the largest producer of smallgoods in Australia. Primo sources its meats both locally and from overseas.

Acting on an anonymous complaint that Primo was mislabelling imported meats in as “Product of Australia”, two officers from the Authority conducted an unannounced inspection of the plant.

They found that imported pig meat was being placed into packaging labelled either “Product of Australia”, “Meat Content 100% Australian” or “100% Australian Made” or a combination of these claims. When they raised this matter with Primo's management, they were advised that it must be a mistake and that corrective action would be taken.

The investigators also conducted a tracing exercise to ascertain the origin of selected products. They selected packaged products (two from Primo's production plant and three from a retail outlet) and asked Primo to supply documents that would identify the source meat used in their production. Primo was unable to do this.

Though it initially vowed to vigorously defend all charges, Primo ultimately pleaded guilty to all “misleading conduct” (i.e. mislabeling of food products) and records management offences.

Although Primo had pleaded guilty to the charges, the court still had to decide on an appropriate penalty. Primo's workflow and records management practices came under close scrutiny.

Primo did in fact maintain a system of documentation from receipt of pork meat through to dispatch of packaged product. Under that system, all meat received by Primo received a meat code. In the case of imported meat, this was an order code provided by the supplier. For local meat, it was a combination of supplier name abbreviation and delivery date information.

The meat code could be used to differentiate imported from locally sourced meat, and was reproduced on all documentation generated to track the meat through processing and packaging.

After the sides of pork are cooked, the meat is sliced and packed. During this process, imported and local meat is further distinguished by coloured labels or tags.

Following machine slicing, the meat moves onto a packing line for manual sorting and assembly into lots by weight and type.

The lots are then transferred to another machine for packing. Each pack contains a “use by” or “best by” date and barcode which is scanned before the product is dispatched.

Each packing line produces a daily Form 71 which records details of what was packed during the day. The Form 71 recorded meat codes of imported meats (although curiously it omitted this information for local meats).

Problem was, Primo could not provide this document to the Authority when it requested business records in relation to the tracing exercise. The court noted this was a key tracing document.

There was no suggestion here that Primo produced unsafe meat for consumption. In the judge's view, however the purpose of the Food Act extended beyond ensuring that food was fit to eat. It required that purchaser's be given accurate information about food purchased. He pointed out that mislabelling could compromise consumer safety, where it becomes known that meat from a source



country is contaminated, but a purchaser was misled into thinking that the meat was local and therefore uncontaminated.

The mislabelling was compounded by the failure to keep adequate records. The judge noted that “the Act provides for a scheme whereby records are sufficient to institute a recall of products.” In the instances charged, Primo could produce no records that would enable a recall of the product where a problem arose with the source of the meat.”

The judge was satisfied that the offences were the result of systematic failure by Primo to properly implement quality control procedures. He noted that certain procedures made that failure more likely such as the “Form 71 provision that local meat be represented by omission and the apparently casual storage of the records”.

In sentencing, the judge noted Primo's guilty plea and genuine remorse. He also took into account the significant overhaul that Primo instituted of its systems which included: expansion of the quality assurance (QA) team; updating procedures manuals particularly in regard to identification, traceability, document/records control and procedure, and the requirement for a meat code to be entered on Form 71 for all meat.

Fines were imposed in relation to each count involving the failure to maintain records.

The Matrix

The sentencing of Primo for its failure to keep adequate records can be contrasted with the treatment by the Federal Court in July, 2010 of an allegation that a company had failed to retain hundreds of thousands of documents evidencing financial transactions.

The matter was Matrix Film Investment One Pty Limited & Ors v Alameda Films LLC. At stake in these proceedings was the payment of licence fees for the highly successful Warner Brother's (Alameda) 1999 film, “The Matrix” which grossed \$171M.

Alameda was the distributor of The Matrix. It acquired its distribution rights under a distribution agreement with the films owners, Matrix Film Investment One Pty Limited (“Matrix One”). For those rights, Alameda was obliged to pay Matrix One a licence fee calculated in accordance with a Licence Fee Formula in the agreement. Alameda was required to issue earnings statements to Matrix One. Those earnings statements were duly issued by Alameda between August 2001 and August 2005. Matrix One then had a time limit within which it could challenge figures provided

by Alameda. Matrix One challenged the earnings statements and audited the defendant's books between 2003 and 2005. Following the audit, certain specific objections, concerning overstatement and understatement of certain revenues and expenses, were formally raised. These objections ultimately became the subject matter of the legal proceedings.

Extensive discovery and other pre-trial steps duly took their course and the matter was set down for hearing. That hearing was well underway in July, 2010 when Matrix One sought to add a fresh allegation to its case, namely that the Earnings Statements provide by Alameda "erroneously included deductible expenses for which no supporting documentation has been retained."

Effectively, at the last minute, Matrix One demanded that Alameda justify all \$100m of the expenses in their earnings statements by producing the original supporting documentation such as contracts, purchase orders, invoices, payment vouchers and receipts. The judge rejected the amendment, saying that it was 'particularly prejudicial' to Alameda because of the scope of the additional claim (\$100M), the extent of the discovery obligations it raised and the fact that it had not been raised during discovery. If it had been, he could have more fairly balanced the interests of the parties by fashioning appropriate discovery orders whereby the defendant's primary documents could have been sampled.

Different conclusions

In these two cases, allegations were made about failures to retain primary documents however the two outcomes were very different.

In the Primo case, by the time the matter came to court, the Food Authority had already proved its case in that the company was unable to produce its records. It was also able to show that the failures were systemic and that the breaches had the potential to jeopardise public health and safety.

In the Matrix case, the decision not to allow Matrix One to pursue its allegation that Alameda had failed to retain its primary documents that supported its financial systems, was classic example of the use of the court's case management powers.

The authenticity and reliability of any reports, statements, or other output from a computer system, is of course subject to challenge by the other party. One way to validate the data is to inspect the primary documents from which the data was extracted.

Just because an issue can be raised, doesn't mean that the court will entertain it. The overarching principle of the court in civil litigation is the just resolution of disputes according to law, as quickly, inexpensively and efficiently as possible.

In the words of the defendant in The Matrix case, "why would an allegation of this magnitude be permitted so late, when it so magnifies the issues and discovery burden, when the fault lies with the plaintiffs for the timing of its raising?" The court agreed.

Records managers should take some comfort from the words of the judge who summed up the court's position in relation to this type of discovery application, in this way:

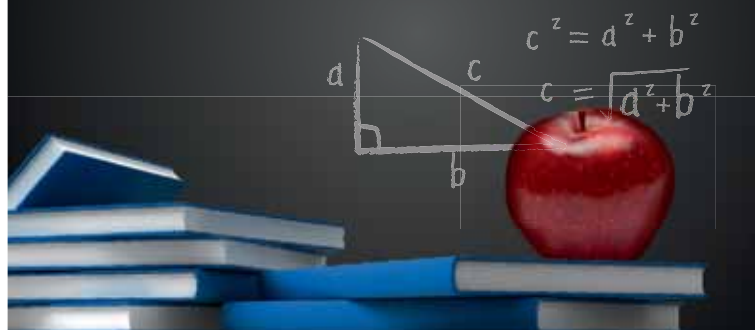
"Other than in exceptional circumstances (where, for example, document destruction or fraud is alleged), it would indeed be surprising for a court to impose or enforce discovery of such a vast number of historical documents, that in many cases are now difficult to retrieve, and all the more so when many business records in the form of general ledger print-outs and the like, have already been discovered"

Some may be tempted to call this a victory for common sense!



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

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Australian Microfilm Services/AMS Imaging, established in 1971, is an ISO accredited service bureau that specialises in active and archive imaging. Our services incorporate everything from the high speed scanning of business records to handling sensitive and heritage materials. Our services also include the conversion of all microforms back to digital as well as the creation of microfilm from traditional and modern methods. At AMS we can handle all sized documents and plans in colour or black and white.

Branca Micrographics

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Wetherill Park NSW 2164

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Fax: +61 2 9756 4246

Email: info@branca.com.au

Web: www.branca.com.au

Branca Micrographics complete suite of integrated document management services to streamline business processes, reduce costs and increase operational efficiencies. Combining over 30 years of experience an established methodology to deliver robust dynamic solutions and the latest in data capture and image management systems, Branca Micrographics offers complete end to end services extending from pre implementation planning through to delivery support and management services to a diverse portfolio of organisations. Branca Micrographics

comprehensive document management and support services include: Scanning and Data Capture: Microfilm/Fiche/ Aperture Card Conversion: Book and Bound Material Scanning: Hosted/On-site AP Automation: Web Based Workflow and Retrieval systems.

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Email: info@bcolour.com.au

Web: <http://bcolour.com.au/>

Chandler

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Email: melbourne@chandler.com.au

Web: chandler.com.au

Sydney, Brisbane

Chandler provides scaleable document scanning and work flow solutions for your organisation. Chandler manages document creation, distribution scanning hosting and storage on line and off-line.

Converga

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Email: hello@converga.com.au

Web: www.converga.com.au

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Decipha offers high speed, high volume imaging services to meet the requirements of your business. A business of Australia Post, Decipha offers nationwide imaging services, backed by a broad range of capabilities in document auto categorisation; data capture; secure electronic; transmission; workflow and electronic archival and retrieval of documents. These capabilities enable images to be appropriately indexed and stored or distributed depending on your business needs.

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e-file

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Fuji Xerox's Imaging and Document Management Services provides scalable, flexible and secure options to meet your daily business needs. Streamline your document workflow for optimal cost efficiency and response time. Our team provides comprehensive capabilities, from document scanning and conversion through electronic document management and storage. No more time spent searching for information and no more money spent storing paper. Achieve instant access to information that gives your firm a competitive edge. At Fuji Xerox, we also understand that submitting business critical documents for imaging and document management requires a high level of trust. We earn it by ensuring our services meet all of your company's specific security needs, from employee controls to advanced disaster recovery.

Gosford Micrographics

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Gosford Micrographics brings 27+ years of microfilm and scanning experience to the table. With the ability to scan and/or microfilm any paper documents plans/drawings and bound books. The facility includes a microfilm processing and testing laboratory to International Standards. The service can extract data from any document match existing data to scanned documents and create a searchable database for users to access the scanned information. There is a book-binder on-site to bind the originals into a hard-cover with an embossed title. This is a "one-stop shop" for all those scanning and microfilm needs.

Grace Information Management

Grace Information Management
Unit 49/45 Powers Road
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Microsystems offer our clients a choice of outsourced bureau services or in-house solutions. Some of our services are: Scanning of Documents/Drawings, Web/CD/DVD based document retrieval solutions, Data Entry, OCR/OMR/IMR, forms recognition, In-house solutions, consultancy services, hardware requirements, and all types of microfilming services. Established in 1975, Microsystems is certified as a Quality Assured Company under the ISO 9001 standard.

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Salmat Business Force

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Salmat's digitisation and content management service assists organisations and their staff in the management, processing, distribution and storage of all types of business communication and associated business processes. The service also provides valuable customer information for internal use, or for provision to customer self-service portals. The service eliminates the movement of paper around an organisation by employing automated image and data capture and routing. Digitisation takes place in secure environments in Australia and Asia, delivering images and data to recipients directly, or into workflows for downstream processing.



Scan Conversion Services

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Scan Conversion Services (SCS) is an Australasian leader in information innovation, providing scanning and data capture services since 1996. The software and process solutions offered by SCS have been developed and perfected to streamline document conversion, process automation and data validation and SCS is an iAwards merit award winner for break through technology for the finance industry. Solutions can be provided to be used in-house complementing your own business systems and processes, or SCS offers a full external bureau service which includes accounts processing, workflow solutions and secure hosted image archiving, through to mail processing, microfilm scanning, and forms processing and scanning.

Scan2Archive

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Parramatta NSW 2150
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Email: info@scan2archive.com.au
Web: www.scan2archive.com.au

Scan2Archive operate a full service scanning facility with the ability to scan up to 44" width plans/drawings/maps in full high-resolution colour. The ability to

extract data from any document/plan at extremely high accuracy. The scanning service includes any paper document, bound books, microfiche, microfilm and aperture cards.

Speedscan

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Web: www.speedscan.com.au

Speedscan brings together a combination of experience, leading edge technologies and robust processing services to deliver world class outsourcing solutions for document intensive business processes. These Document Process Outsourcing (DPO) solutions are delivered from multiple locations across Australia, New Zealand and The Philippines, driving efficiency, productivity and profitability for more than 500 companies and managing more than one billion pages. Our experience across the region is derived from over 10 years of proven success in creating powerful and effective solutions for business.

West-Net Imaging

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West-Net Imaging is an Image & Document Management Specialist company. West-Net is fully versed in all facets of Records Management having spent the past twenty years at the forefront of this field. West-Net offers a wide range of services ranging from Document Scanning Microfilm Conversion and Archival Microfilming to CD Mastering and Duplication.



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MediaRich opens new window on SharePoint

Equilibrium is freeing up the ability to view any type of media inside SharePoint with the release of a new "Instant-On" capability for its MediaRich ECM software.

This creates thumbnail and multiple views of any image, video and audio file while ingesting metadata in any document library web part with a click of a button.

It provides the ability to instantly view office documents, all Adobe CS files and images, watch videos and hear audio files from over 400+ file types inside any SharePoint document library web part.

Static documents and images can be viewed in detail with Unizoom, Equilibrium's proprietary universal zoom and pan technology requiring no special plug-ins.

For video and audio, Equilibrium's new Silverlight streaming player is utilised in combination with MediaRich to provide audio/video proxy creation and management enabling a small proxy, or the entire video to be shown in one of four pre-set resolutions.

All of the visualisation functionality is now available seamlessly in SharePoint search, including video playback, audio review and Unizoom for all documents and other media types.

"These new capabilities are a rules changer for the SharePoint community," said Sean Barger, CEO of Equilibrium, "Companies seeking to increase SharePoint adoption, accelerate collaboration and workflow approvals or need to simply find, view and prepare content, can now have a great experience in any SharePoint workspace and from any smart device with MediaRich ECM for SharePoint."

MediaRich ECM for SharePoint connects to the SharePoint Server and automatically handles the derivative cache management, reducing the constant strain of pulling files from within databases

and simultaneously providing just-in-time content preparation, eliminating the need to pre-process multiple versions of files in advance.

In 4.2 the media asset management capabilities have been expanded to enable batch metadata enhancement during any upload into SharePoint, providing the ability to append or replace metadata into any field in large groups of files during the upload process. New features include, forms based authentication support and the addition of the MediaRich content type, centralising extracted IPTC, EXIF and Adobe XMP metadata which is saved into the SQL Server.

MediaRich ECM for SharePoint version 4.2 is available for Windows SharePoint Services, SharePoint Foundation, SharePoint 2007 and SharePoint 2010.

Quantum leap for archiving

A new archive conversion feature for Quantum's StorNext data management software simplifies migration from legacy archive platforms. StorNext's new Archive Conversion Utility (ACU) is designed to reduce the expense and time it takes to move files from existing legacy archives to a StorNext solution. The first release of this conversion tool will support the conversion of data from Oracle/Sun's SAM-FS and QFS software platform.

With the ACU, terabytes (TBs) or petabytes (PBs) of archived data located on tape media can be accessed within hours – instead of months – of initiating a data migration to StorNext.

Quantum's approach enables storage administrators to transfer only file system structure and metadata information about the associated data files to the StorNext Storage Manager file server.

Once the transfer completes (normally within a matter of hours) all non-StorNext files on original media can be accessed and modified from the StorNext File System. Administrators can control data movement over time, from the legacy media to StorNext Storage Manager native media, without disruption to

Document Redaction delivered for SharePoint 2010

Informative Graphics Corporation (IGC) has announced new document redacting, collaboration and viewing capabilities for its Brava Enterprise 7 and Redact-It Enterprise 7 products, providing deeper integration with SharePoint 2010.

The Brava 7 interface has been redesigned and a new text compare feature helps users find differences in document version.

To facilitate review and approval processes, Brava's unique Changemarks feature now boasts threaded discussions. Users can not only reply to each other, they can add a status to the discussion, such as "Question" or "Accepted." The list of status options is easily customizable.

Document reviewers can leverage Brava's new text compare feature, which allows them to quickly identify where changes occurred between versions and step through them one by one.

For architecture, engineering and manufacturing firms, Brava now can do takeoff counts and aggregate area and length measurements, all of which can be easily exported to a document or spreadsheet.

Brava can be skinned to match any web site or content management system. Toolbars appear only as needed, reducing screen clutter and streamlining document processing. Brava also allows integrators to re-label or remove features, providing a tailored and familiar user experience.

Included with Brava Enterprise is the Brava Flash Viewer, which now includes the ability to create markups, including threaded discussions. Searching in Brava Flash brings a context view where users can quickly scan for the right hit.

Also accompanying Brava 7 are new releases of companion products Net-It Enterprise and Redact-It Enterprise. Net-It offers automated publishing of virtually any file format to TIFF, PDF, DWF and secure CSF. Redact-It offers automated redaction of sensitive information from documents. Both products now have an enhanced directory monitoring mode that requires no integration or scripting. Administrators simply establish the criteria for each folder (can have multiple folders with different criteria), and Net-It does the rest.

Brava for SharePoint allows interaction with documents via a web browser. Brava adds key document-centric workflow actions including the ability to add stamps, create threaded discussions and other markups, publish documents to TIFF or PDF, and redact sensitive content and privacy information.

It provides the ability to view virtually any file format within SharePoint and search more effectively using Brava's zero-client viewer that provide thumbnails and full document previews in the search results page.

Redact-It Enterprise for SharePoint offers automated redaction of documents in SharePoint libraries. Redact-It will create redacted TIFF or PDF versions of the original document and completely remove all content selected for redaction. The redacted document can be saved back into SharePoint or the file system.

the organisation's business workflow operations. This approach provides complete flexibility on how quickly physical data migrates to the StorNext supported system.

Janae Lee, Quantum senior vice president, Disk and Software Products Group, said, "For enterprises that may feel locked into a limited file and archiving system, our new Archive Conversion Utility makes the migration process straightforward and fast, minimising the impact on ongoing operations."

Building enterprise links to Salesforce Chatter

Information Builders has introduced a new version of its iWay enterprise information management (EIM) software, with full support for Salesforce Chatter, the real-time enterprise collaboration and social media platform.

Rob Mills, VP Sales, Asia Pacific, iWay Software, says that in recent years Australia has experienced an explosion in the use of social networking and real-time collaboration technologies such as Facebook and Twitter, and this extends deep into the business sphere as well.

"Now enterprise users are looking for ways to tap these type of platforms to interact not just with one another, but with applications, systems, transactions and data as well, giving rise to solutions like Salesforce.com Chatter," says Mills.

"With this new functionality of iWay CEP Enable, we're extending the benefits of this collaboration to users' entire enterprise applications, significantly enriching the value of Salesforce.com Chatter."

Salesforce Chatter enables instant communication and information sharing within the enterprise. Although the service supports salesforce.com and related native applications, all other systems traditionally were unable to participate in the Chatter framework. The latest iWay platform makes this participation possible by extending the benefits of Chatter to every system throughout the enterprise, regardless of source or location.

Isys takes deep dive into documents

ISYS Search Software has announced the release of Document Filters 2010, the new version of the company's solution for text extraction, printing and high-definition viewing.

ISYS Document Filters is an end-to-end filter solution, providing OEMs, ISVs and enterprises with a key component for driving text analytics, e-discovery, email archiving, data loss prevention and other content processing systems.

"Enterprises and their software partners are increasingly tasked with conducting deep inspection of their unstructured content stores, either as a discovery exercise or for compliance or analytics purposes," said Scott Coles, CEO, ISYS Search Software.

"ISYS is the only vendor directly engaging with customers and innovating according to current market demand for text extraction, printing and high-definition viewing, and ISYS Document Filters 2010 is the result of these efforts."

OEM search deployments of ISYS Document Filters include EMC, HP, Autodesk, Reveal, Data Global and Bridgeline Digital. These companies have selected ISYS, in part, for its ability to go deeper than the base connector level, and extract and render file contents for deep inspection, analysis and surveillance of information.

"When the push for federated search became evident some years ago, market demand was focused on connectors, which enabled a company's search engine to 'talk' to its various enterprise applications," said Derek Murphy, CTO, ISYS Search Software.

"Document Filters go deeper than the application layer that connectors support, and actually pull through the text and metadata that drive analytics. In this sense, filters serve as the very tool that

Simpana 9 adds governance

Commvault is looking to solve the challenges of exponential data growth by broadening its support for divergent storage snapshot platforms with the latest version of its Simpana software. Simpana 9 also features a new take on deduplication and the widespread challenge of managing rapid growth in virtual machines.

"It's all about modernisation of data protection and we spent a lot of time talking to our customers about the challenges they face," said Gerry Sillars, Commvault Vice President Asia-Pacific and Japan.

"We have got customers who are moving 350TB of incremental data every night. Data continues to grow at 50-100 percent a year and the traditional ways just aren't going to cut it any more in our opinion."

Simpana 9 responds by merging storage array vendor's snapshot technology (74 different arrays are now supported) with Commvault's data management capabilities.

"Once we have the snapshot, it's off the source, the production server, so the speed of recovery is greatly increased and there is no impact on production systems. It really frees up the virtual environment from the challenges of backup," said Sillars.

The Simpana platform also leverages CommVault's SnapProtect snapshot technology to provide rapid protection and recovery of VMs, with automated discovery and more granular restore capabilities. Sillars says the constant spawning of virtual server farms is growing to be a major issue.

"One of our customers FaHCSIA has gone from having no VMs 2 years ago to 300 VMs in test and 200 in production."

New source-side deduplication promises to reduce the amount of data being transferred across corporate networks from remote servers by up to 90 percent, while slashing backup windows by more than 30 percent.

power all content processing systems, and ISYS Document Filters 2010 have been architected specifically with today's customer in mind."

Acrobat 10 makes its mark

Over two years since the release of Acrobat 9, Adobe has delivered its Version 10 update, incorporating enhanced integration with SharePoint and a simplified user interface.

Known as Acrobat X, the new edition offers guided Actions that simplify multi-step document preparation and publishing tasks previously accomplished in batch processing.

Adobe is also promising re-use of content across the enterprise will be easier with higher quality export to Microsoft Word and Excel formats.

PDF Portfolios now include new layouts, visual themes and colour palettes.

The SharePoint integration provides for check-in and check-out of PDF files for reviewing and editing shared documents.

Adobe Reader has also had a refresh, with the X version adding commenting tools such as Sticky Notes and Highlighter tools and Protected Mode security capabilities.

Adobe SendNow is a new document exchange service at Acrobat.com that enables users to send and receive large files and track them with proof of receipt, avoiding email gateway issues, complicated FTP servers, or the costs of expensive overnight mail.

Acrobat X pricing is expected to be as follows: Standard \$A489/\$A227 upgrade; Pro \$A728/\$A324 upgrade; and Acrobat X Suite \$A2007/\$A1333 upgrade (all prices inc. GST).

Content boxed for SMBs

Fuji Xerox Australia has announced the release of DocuShare Connect, an electronic content management system (CMS) designed for small business. Packaged with one of the Fuji Xerox ApeosPort multi-function devices (MFDs), DocuShare Connect is an "out of the box" content management solution that can be operated from both PCs and Fuji Xerox ApeosPort MFDs.

DocuShare Connect enables up to 10 users and 10 guests to scan and save valuable documents directly into the CMS from the MFD. Search and retrieval of documents in the CMS can take place at the MFD, using file names or key words within the document.

Documents can be archived securely, with full version control and history. Email notifications are sent to staff when a new document is placed in the CMS while check-in/check-out ensures users are working on the most up-to-date documents.

Scott Jackson, National Manager, Office Solutions Business, Fuji Xerox Australia said, "DocuShare Connect is a simple but sophisticated solution to an age old problem for busy small offices. It takes document management out of the too-hard basket and puts it back in the hands of staff enabling greater workflow efficiencies, time savings and ensuring that all documents are securely archived yet easy to find when required."

Canto sings on smartphones

Canto Cumulus mobile apps for iOS (iPhone/iPad), Android and BlackBerry are shipping now, thanks to the efforts of Canto partner Vitras. The suite of apps, named SuduS, offers on-the-go Cumulus users quick access to catalogs and files, production status updates and more, from virtually anywhere.

"An increasing number of users want anywhere, anytime access to Cumulus," explained Canto CEO Ulrich Knocke.

"SuduS offers convenient access to Cumulus, and it demonstrates the enormous value to Canto and our customers of having such a capable partner network."

SuduS offers native apps for the supported platforms, not just Web browser interfaces that can be cumbersome to use on smaller mobile screens.

"The moment you connect to Cumulus via SuduS, you know you've bridged professional DAM with an interface perfectly designed for mobile access," said Knocke.

Canon gives voice to the MFP

The multifunction printer (MFP) is now a VOIP fax terminal following a partnership between Canon and MESSAGEmanager Solutions in Australia. Canon MFP users are now able to send and receive VOIP faxes via email, desktop, MFPs and CRM and ERP applications. MESSAGEmanager Fax IP fax software complies with the T.38 standard enabling facsimiles to be sent and received reliably over IP networks.

Luke Maddison, Senior Product Manager - Business Solutions, Canon Australia said: "Professions such as finance, government and legal, still rely heavily on fax as a legally binding and essential means of communication. Businesses are converting to IP Fax software at an increasing rate to take advantage of the associated cost savings and efficiencies.

"MESSAGEmanager provides businesses with a centralised enterprise fax solution which is effortlessly managed at a remote site, resulting in lower operating costs and increased efficiencies."

Integrating with Canon's imageRUNNER ADVANCE platform and its software products such as uniFLOW Output Manager and eCopy, MESSAGEmanager automates document workflows and streamline labour-intensive and document-heavy processes.

It includes tracking, logging and archiving of inbound and outbound faxes, integrating them into a Document and Content Management Solution. This aids in business compliance as the fax solution allows IT departments to electronically tailor how faxes are accepted, routed, audited and archived.

M-Files 7.0 enhances e-mail management in Outlook

The latest release of the M-Files document management software, M-Files 7.0, provides enhancements to e-mail and workflow management as well as improved search capabilities

With the volume of documents rapidly increasing in many companies, M-Files 7.0 adds support for large document vaults that contain millions of documents.

M-Files 7.0 adds 'M-Files aware' folders and support for standard Outlook rules for automatic e-mail processing. When an e-mail is moved to one of these folders, either manually, by dragging and dropping, or automatically via an Outlook rule, it is automatically stored in the M-Files vault and classified with user-defined tags. This direct connection to the corporate document vault via Outlook folders requires no special technical skill and enables automated archival and workflow processing based on who sent the e-mail, to whom it was sent, or what it is about.

When e-mails are stored in the vault, in addition to tagging them with user-defined properties, or metadata, all threads are maintained, along with relationships to companies or customers, and contacts. This allows an e-mail to be quickly and easily located and sorted based on the customer or contacts to which it is related, or by any property, such as the subject, the date received or sent, the project to which it is related, and so on. In addition, M-Files eliminates duplicates by checking to determine if an identical e-mail has already been saved. Other new features in M-Files 7.0 include:

- * New grouping options within search results that speed up the location of documents and other objects;
- * Predefined search criteria, such as searching only for documents or customers;
- * Improved workflow assignments and shortcuts for changing workflow states; and
- * The ability to save to the vault as a PDF without opening the document in an application;
- * Improved handling of larger document vaults that include millions of documents.

M-Files eliminates traditional Windows folders; instead, users open from, and save to, the M-Files Vault. Documents are simply classified as a common type, such as an invoice, proposal, e-mail, contract, etc, and a descriptive tag or two is added. Finding a file is as simple as typing in a tag or performing a full-text search right from the Open or Save dialogue box of any Windows application. This is possible due to M-Files' "Virtual-Local" drive technology that allows the vault to appear as a local hard drive (the M: drive), in any standard Windows Explorer dialogue box, whether online or offline.

WebCase 1.9 boosts capture

WebCase 1.9, the latest version of Vere Software's Internet evidence collection software, incorporates three new major features: Full page capture, HTML, or "source," code capture, and 64-bit compatibility.

Full page capture will accomplish this, in part, with automatic scrolling. In previous WebCase versions, investigators had to scroll manually to areas of a page that were not immediately visible on the screen. Lengthy pages such as those seen on MySpace could result in numerous screenshots. Now, WebCase captures an entire web page in a single JPEG graphic file.

A HTML capture option allows WebCase users to collect the underlying HTML, or source code, separately from the web page. The new feature allows the investigator to review the code much more easily.

Shipley added, "WebCase 1.9 reaches a broader spectrum of users who are now working with 64-bit systems." 64-bit compatibility is important as WebCase users move to the latest in desktop computing technology. 64-bit systems have the performance to process more demanding applications, such as audio and video encoding.

WebCase 1.9 now also supports Windows 7 along with Vista and XP, and adds Internet Explorer 8 to its list of supported browser versions. Built for legally defensible evidence collection from Web pages and social networking sites, WebCase digitally "fingerprints" its evidence using commonly accepted hash algorithms.

Quantum unveils high-end VTL

Quantum has launched a new backup and deduplication system for multi-tier, enterprise disaster recovery and data retention.

Acting as a virtual tape library (VTL), the DXi8500 can backup or recover at 6.4 TB/hr, and all necessary software licenses – including deduplication, replication, path-to-tape and support for OpenStorage API – are standard features bundled into the base price.

The DXi8500 incorporates 6-core Nehalem processors, RAID 6, 8Gbps Fibre Channel, and both 1Gbps and 10Gbps Ethernet connectivity. It employs a multi-tier strategy to assign different kinds of data, indexes, metadata and operations to optimal storage media. Scaling from 20TB to 200TB of usable capacity in a single unit, the DXi8500 is suitable for heterogeneous environments, including deduplication-enabled VTL, CIFS, NFS and OST, as well as native mode VTL and NAS shares.

To integrate short-term data protection and long-term retention, the DXi8500 provides an application-specific direct path-to-tape option for both VTL and OST interfaces. This automated function writes backup data directly from the DXi system to an attached tape library while bypassing the backup server. The operation is integrated with the backup software to provide automation, a single point of management, and a fully synchronised catalogue across disk and tape.

Included as a feature on all DXi8500 units, Quantum's DXi Advanced Reporting software presents a detailed view of internal appliance operations, including backup and replication data for flexible trend analyses, enabling smarter planning and lower long-term costs.

i2 frees up document batch processing

The latest version of i2 Conversion Server, an automated document batch separation and auto indexing application, now offers the ability to run the application as a service.

Document batch separation and file conversion jobs can be run as a service, independent of the PC running the application.

"This takes i2 Conversion Server to a whole new level", said sales director, Andrew Wade.

"You can now set up jobs across the organisation for document separation and file converting and with the run as a service feature set and forget the application from that point forward. You can watch source scanned folders from photocopiers across the network, and from this one point provide a very powerful automated document batch scanning solution."

The i2 Scan product has also been updated with Sharepoint 2010 connectivity and the ability to provide ODBC lookup validation on indexes during processing (providing two-way data comparison with external databases as part of processing a batch of documents).

Both applications are available for evaluation at the company's Web site.

Gatekeeper enforces CAD design standards

Cadac Organice has launched a solution to help companies define and enforce design standards on AutoCAD drawings and save time and effort in the design and control process, called Gatekeeper.

It allows for design standards to be defined and saved in a Gatekeeper Standards File (GSF). These files are then distributed to internal CAD Engineers and external design partners to be applied to design work.

As CAD Engineers finish designs, they use Cadac Organice Gatekeeper to check them against the standards. Similarly, Document Controllers use Gatekeeper to check incoming CAD files. When checking files, Gatekeeper generates a detailed report showing exactly which CAD files meet the standards and which do not.

Cadac Organice Gatekeeper works without AutoCAD and is a standalone application. It consists of a runtime version and a full version.

The full version is licensed and is used by Document Controllers to define and distribute design standards and to check CAD files against these standards. The free runtime version is used by CAD Engineers and partners to read the Gatekeeper Standards File and check CAD files against the design standards prior to submitting them.

Cadac Organice Gatekeeper is based on Autodesk's RealDWG and is capable of checking CAD files in Autodesk's DWG format against design standards.

Multi-file document viewer

Adeptol has released the next version of its document viewing platform. Adeptol Document Viewer is a high-speed high-fidelity platform allowing users to view more than 300 file formats with no downloads, plug-ins or active x controls.

The new version of Viewer introduces a range of new features for developers and business users, and offers better performance and loading times.

Some of the key new features include a built in text extraction engine to extract text from documents, renderer for conversion of documents to pdf, tiff, png and other imaging formats, support for additional file types, fidelity improvements for office documents, enhanced printing capabilities and improved APIs for developers.

For users it gets very frustrating when they have to wait for a document to load before having to start reading it. The new Viewer improves on its built-in self optimisation technology to get the pages directly from the server as they are being rendered and improves the load times by more than 50% over previous versions. What this means is, very high-speed load times for users. The viewer self optimises to load the documents faster, based on network connection speed, document size, server load, client browser and client machine memory.

Prateek Kathpal, CEO of Adeptol, said, "This new release has been much awaited and a lot of work has gone into this release. It is a result of close cooperation with leading partners and strong relationships with our customers, who have provided us with invaluable feedback. The new version of the product offers some unique features with an enhanced API for developers to embed the viewer within their applications easily."

People On The Move

Lee Bourke, FileBound Australia Director, has been named Chief Executive Officer and will continue on as Company Secretary. Luke Bartlett, a FileBound Australia Director, has been named Chief Operating Officer and Chairman of the Board.

"It is an honour to have been entrusted with the position of CEO of FileBound Australia," said Mr Bourke. "I look forward to working with the FileBound Australia team, its clients and stakeholders as we continue to grow the FileBound brand in Australia. We have a bright future in a growing and progressive industry and it is an exciting time to be involved in the company".

Lee has a strong pedigree in Business Management, Document and Records Management and Technology Management. Lee was formerly a Director at the SEMA Group.

Quantum Corp. has appointed **Adrian Sharkey** as Country Manager, Australia and New Zealand.

"Over the past year, Quantum has introduced a broad range of new disk-based backup and deduplication, software and tape products for customers of all sizes to help them store and protect an ever-increasing amount of data more efficiently and cost-effectively," said Sharkey. "In my new position, one of the key areas of focus will be providing additional support to channel partners as we work together in bringing these solutions to end users."

During his career, Sharkey has held positions in sales, service, and both channel and general management. At Hitachi Data Systems, he was responsible for the creation and execution of strategic channel sales plans. Prior to that, Sharkey was a virtualisation practice manager at S Central and also worked at Datacom Victoria, Optus Group/Alphawest, CSC Australia, BOC Gases and Syntegra.

Managed file transfer vendor **Accellion** has announced the promotion of **Kieran O'Shaughnessy** to Director of Sales, Asia Pacific.

"Growing security and compliance concerns are driving corporations and government agencies to implement a more secure, easy-to-use method for sharing confidential files. Kieran's deep knowledge of the file transfer space and proven track record of success in helping customers solve their file transfer needs make him an ideal fit for this new role," said Gary Rogers, senior vice president of sales for Accellion.

Prior to joining Accellion, O'Shaughnessy held the position of Asia Pacific channel sales director for multinational software vendor, the Neverfail Group, where he was responsible for establishing and building a high performance channel network across the region. O'Shaughnessy also has held sales and general management positions with global software vendors Sage and the SCO Group, Inc. with responsibilities for channel and direct sales strategy development and execution.

IFS, the global enterprise applications company, has announced the appointment of **Rob McCarthy** as General Manager and **Kevin West** as Solution Architect in Western Australia. The appointments coincide with IFS opening an office in Subiaco, Perth.

McCarthy is tasked with developing and implementing a new sales strategy in Western Australia, focusing on specific industry sectors such as mining, oil and gas and construction. West will provide sales support and technical expertise regarding the implementation of IFS Applications.

Prior to IFS, McCarthy was a Project Manager for Courtland Business Solutions, a SAP reseller which was acquired by ASG earlier this year. For the past 16 years Robert has worked in sales, pre-sales and project management roles for various companies providing business applications in Ireland, the UK and Australia.

West joins IFS from Evolution Future Solutions where he was Practice Manager for SAP Business One in Western Australia. Kevin has over 12 years experience working as an ERP consultant and has been involved in many large and complex implementations, across all management levels. He has a particularly strong technical background with experience in SAP, Epicor, Oracle and Microsoft ERP solutions.

IFS customers in Australia and New Zealand include Visy, AB Equipment, Babcock, Dairy Australia, Hawker Pacific, Execujet and Globus Group.

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www.kmasia.com

Share 2010

29 November-1 December 2010 Sofitel Sydney Wentworth

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www.share2010.com.au/share10

The National Records and Information Officers' Forum 2011

22-24 February 2011

Rendezvous Hotel, Melbourne

Explore the latest advancements in records management, digital preservation and information management. This event will provide essential strategies for implementing business aligned record keeping practices within your organisation.

<http://liquidlearning.com.au>

Stephen Few Business Intelligence Workshop

23-25 February 2011

Bayview on the Park Hotel, Melbourne

Stephen Few, leading educator and author in data visualisation techniques, is delivering a three-day workshop in Melbourne in February 2011 which prepares you for the many facets of presenting and analysing quantitative business data. Stephen's insights and material are based upon the research completed for his three books; Show Me the Numbers: Designing Tables and Graphs to Enlighten, Information Dashboard Design: The Effective Visual Communication of Data, and Now You See It: Simple Visualization Techniques for Quantitative Analysis.

For additional information, email training@altis.com.au or call 02 9211 1522.

Australian SharePoint Conference 2011

8-9 March 2011

Hilton Hotel, Sydney

Keynotes: Joel Oleson and Mark Miller from the USA.

Gain insightful knowledge from SharePoint experts, including SharePoint MVPs, well known and respected local and international SharePoint community representatives, Microsoft attendees and many others.

Additional training opportunities on Monday 7th March and Thursday 10th March, 2011, with intensive half day SharePoint workshops, including hands on labs.

www.sharepointconference.com.au

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