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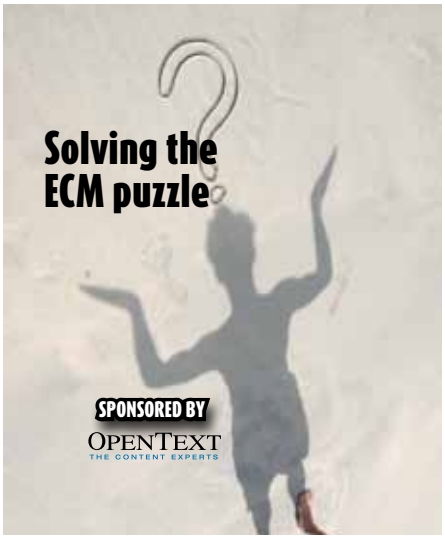

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ISSN 1320-176X
PRINT POST APPROVED PP255003/09418

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Kofax marked down for 2011 results

Australia has made a strong contribution to record 17% Asia-Pacific revenue growth for Kofax, but a weak set of numbers for global software sales in the second half of 2011 caused a sharp drop in the company's share price after it announced its annual results.

The supplier of document scanning and business process automation software announced $US128M annual revenue for the year up to June 301 2011, with Asia Pacific contributing $US18.2M - split evenly between software licenses and maintenance and professional services. Overall Kofax revenues grow 12 per cent, however its warning that that revenue growth had slowed in the second half of the year caused the share price to drop.

Kofax is currently listed on the London stock exchange, however headquarters have moved to the US where it plans to dual list. It says US investors have a better understanding of software companies.

Reynolds C. Bish, Kofax Chief Executive Officer, said: "We experienced strong revenue growth during the first half of the past year but less during the second half. As stated in our July trading update, we believe this slowdown was caused by longer sales cycles and decision making that emerged as a result of increasing uncertainty and volatility in the global economic environment. We expect these challenges to continue until more confidence and stability return to markets."

Kofax says it is now closing more six and seven figure sales, including two of the largest in the history of the company: a $US4.5 million sale to a global business process outsourcing (BPO) company with a presence in Australia; and $US3.0 million sale to a US federal government agency.

Kofax has a long term ambition to target the ad hoc content capture market, presently dominated by Nuance with 48.9% market share, according to industry analysts Harvey Spencer Associates.

The same report found that Kofax market share of the entire capture market had grown to 15.2%, placing it second after Nuance at 15.6%. Kofax has claimed top position in batch image capture (34.7%, EMC/Captiva in second place with 15%); as well as batch content capture (16.7%, Readsoft comes in second with 10.6%).

QSuper takes a digital leap

The boardroom tool of the future has arrived at QSuper where a SharePoint platform is now delivering sensitive company information each month on iPads. The Trustee Office Solution for Superannuation Boards, a dedicated platform launched by the IQ Business Group (IQBG), has been successfully implemented for the first time at QSuper. QSuper is one of the largest superannuation funds in Australia, with more than 545,000 members and over $A30 billion in funds under management.

The implementation provides each QSuper Board member with immediate access to an electronic Board pack and company information each month in a highly usable and secure environment. Rolled out over a two month timeframe, the Trustee Office Solution now has replaced traditional paper-based Board documentation for its members. It has replaced monthly distribution of dozens of D-ring binders to the Board and Committee members, saving considerable paper stock, assembly time for support staff and transport charges in hard copy deliveries.

According to Chief Officer Systems and Change, Baden Sharples, "The QSuper Board recognises that advanced technologies can now enhance the administration functions of its Charter and the effectiveness of the Board performance.

"With the ever increasing volume of work demanding Board attention there was a drive to migrate the Board to an electronic Board paper offering, however, the provision of a secure access point for Board papers was no more than half a solution for everyone concerned. The elegance of this implementation is that it provides immediate remote and mobile iPad access to not only the necessary Board pack materials, but can connect Board members with broader Fund information should they need it."

SAP delivers Business ByDesign

Australia has joined the global rollout of SAP's SaaS business software, with prices starting at $A11 a month for a platform that can extend to embrace financials, customer relationship management, human resources, supply chain, and project management.

SAP Business ByDesign can be accessed via a web-browser with all data hosted in a German data centre. It is being pitched at small to medium enterprise from 20-500 employees, a market SAP estimates is worth $27B globally.

The solution incorporates a level of integrated document management, as invoices and contracts, etc. can be uploaded or scanned direct to a watch folder for processing. Pricing depends on configuration and ranges up to $A197 per user/month for full access to the complete, integrated on-demand suite.

"SAP Business ByDesign brings the sophistication of an SAP-built solution to Australian businesses interested in cloud and software-as-a-service to help take their business to the next step in growth," said Tim Wilkes, ANZ Partner Manager, SAP Business ByDesign.

"The ByDesign solution offers an unprecedented level of usability with more efficient operations, better service, streamlined accounting and compliance in an offering that is fast to deploy. The CRM module can be in place and functional in a single day while an integrated end-to-end solution in as little as 12 weeks.

"Organisations that are keen to explore this solution have already done some SaaS, whether its salesforce automation or payroll outsourcing. They might be using Google Apps or Microsoft 365 for Backoffice, which is enough for what many people want from document management.

"You can make documentary attachments anywhere you like in ByDesign, whether its a photograph, contract or purchasing invoice, or you can point to where it sits somewhere else whether that's Google Docs or DropBox."

A workflow to scan supplier invoices is included in Business ByDesign, delivering them to folder and initiating a work list for processing. The platform does not include OCR or automated workflow.

Speedscan wins NSW Govt scanning tender

Independent bureau Speedscan has won a contract with the NSW Department of Transport to handle docket scanning and payment processing for the state's Taxi Transport Subsidy Scheme.

The three year contract worth around $1.8million is for Docket Scanning and Payment Processing for the Taxi Transport Subsidy Scheme and Wheelchair Accessible Taxi Driver Incentive Scheme.

Speedscan will apply its document processing technologies to 2.2 million+ taxi dockets per year – significantly improving the Department's ability to process and complete the documentation and payments associated with subsidised taxi travel for NSW residents with a severe and permanent disability. The scheme benefits 77,000 NSW residents, with over 20,000 eligible people assisted every month.

Speedscan also built an online 'Taxi Company TTSS Portal' and a HelpDesk service to assist taxi companies with exception management, reporting and communications.

The services under the contract include docket receipting, scanning, data capture/entry, validation, processing and payment to taxi companies.

The Department of Transport administers the Taxi Transport Subsidy Scheme to assist NSW residents who are unable to use public transport due to a severe and permanent disability. Scheme participants are given a subsidy of half the fare, up to a maximum of $30, for taxi trips and are provided with dockets for the part payment. These dockets must be processed and reconciled to enable monthly payments to be made to taxi companies.

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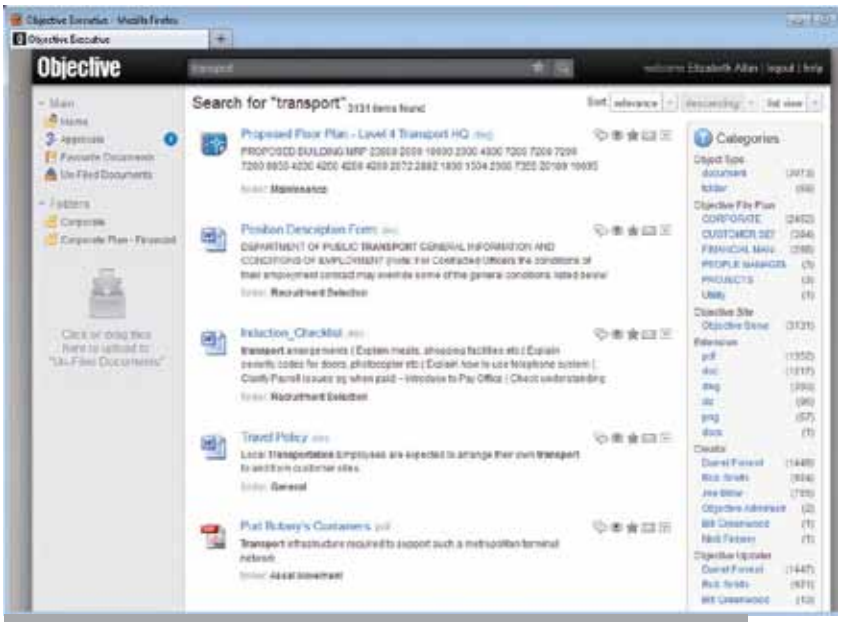
Objective unveils ECM 8

Objective Corporation is seeking to democratise enterprise content management, with its latest release 'ECM 8' providing everyday users with the tools to search, read and contribute content via an Internet browser. ECM 8 has also been beefed up to a full 64 bit architecture, and firmly embeds enterprise search capability from French company Exalead.

"From extensive field testing we believe we've set the benchmark in our quest to deliver a zero-training ECM user experience and importantly, one which is also engaging to use," said Tony Walls, CEO Objective Corporation.

Objective Executive is a new browser based interface that is designed to broaden the use of ECM beyond content specialists to standard users who just want intermittent access to information.

It is able to be used on a variety of mobile devices and provides access to documents and folders; a simple "one-field" search facility, and drag and drop addition of documents to the ECM repository. It also allows local editing and publishing and keeps track of changes.



Objective Executive, delivered through a browser, provides a zero-training user experience, simple one-field search and the ability to add, approve and publish documents.

The traditional thick client is still required by those needing access to complex functions, e.g. information managers and document administrators.

"Objective Executive will enable substantially faster user adoption of ECM throughout an organisation, which in our experience is the key success factor for enterprise information and content management," said Walls.

A browser client introduced with previous versions of Objective ECM, known as Objective Portal, included a full set of ECM functionality. This presented an interface that was considered too daunting for everyday users.

The Exalead CloudView platform for data-extraction, indexation, and text-analytics is now delivered as a core part of ECM 8, replacing the Verity search technology used previously by Objective.

Objective has added a new search option with ECM 8, known as Objective Discover, This is an additional product that introduces faceted search; the ability for users to conduct a familiar, Internet-style search, then further refine the search by applying filters for categories, content type or many other criteria based on the metadata and contents of the search results.

It can return results based on document title, metadata and document content. It can expose information that has always resided in the repository but may have been buried; highlighting for example search text frequency and use patterns or uncovering subject matter experts within an organisation.

Objective believes the accuracy and relevance of search results can be improved by uncovering these relationships, leading to better decision-making.

It promises faceted search will deliver results at speeds users expect from an Internet search experience.

Search results are also able to be subject to security, privacy and compliance restrictions that are required by government, defence and intelligence organisations.

ECM 8 provides support for 32-bit & 64-bit clients, and is backward compatible with the ECM 7.5 client

$250K grant for 3D search

Australian 3D Search technology that transforms the online shopping experience by making it easier to sift through large amounts of visual data, has won a major Commercialisation Australia Proof of Concept Grant.

Developed at Flinders University over a period of 10 years, the patented search technology was spun out into startup Thereitis.com 12 months ago by CEO Guy Sewell. It has since been developed to enable a range of web-based applications, from searching for photographs on your own hard-drive to browsing online dating or social media sites, to online retail. Sewell says Thereitis.com will use the $A250,000 Proof of Concept funding for product development and market validation with beta customers. Additionally, the funds will be used to build a social media platform, shopping portal and hard-drive management application for the consumer market.

You can trial Thereitis.com by visiting www.Thereitis.com. Demonstrators on the site include social networking site LinkedIn, search engine Bing, and an online shoes and clothing store.

Federal agencies face digital checkup

Government CIOs were set a September 30 deadline to report to the National Archives of Australia on their transition to digital records management, the first of three annual reports due before 2014 when the Minister for Privacy and Freedom of Information may step in to hurry the process along.

All agencies have been asked to respond to a 16 part questionnaire, examining issues such as to what extent they discourage the creation and use of paper records, and how comprehensive is its information and records management framework.

Following the first round of submissions, the National Archives is planning to release a 'digital continuity plan' in December 2011 "providing practical guidance to agencies on the management of digital information for as long as it is needed."

Stephen Ellis, Acting Director-General, National Archives of Australia, said, "The Government's new Digital Transition Policy requires all Commonwealth agencies to be more technologically savvy in managing their information and records to achieve the significant business benefits and efficiencies that this offers.

"Today, nearly all Australian Government business is done digitally, but in many agencies records management has lagged behind.

"The reliance on paper records is no longer sustainable as it is disconnected from business processes and technologies ranging from email and spreadsheets through to geospatial data, dynamic websites and SMS feeds.

"Also, effective digital information management is a critical enabler for broader government reforms such as FOI, the information publication scheme, pro-disclosure and open government."

The Australian Government Information Management Office will collect details of agencies' current and proposed records management systems, to ensure compliance with its prohibition against customised or bespoke systems introduced from July 2011.

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Gartner gives Gmail enterprise tick

After being in the market for five years, Google's enterprise Gmail is building momentum with commercial organisations with more than 5000 seats worldwide, and it now presents a viable alternative to Microsoft Exchange Online and other cloud email services, according to analysts Gartner, Inc.

"The road to its enterprise enlightenment has been long and bumpy, but Gmail should now be considered a mainstream cloud email supplier," said Matthew Cain, research vice president at Gartner.

"While Gmail's enterprise email market share currently hovers around 1 percent, it has close to half of the market for enterprise cloud email. While cloud email is still in its infancy, at 3 percent to 4 percent of the overall enterprise email market, we expect it to be a growth industry, reaching 20 percent of the market by year-end 2016, and 55 percent by year-end 2020."

Cain said that, other than Microsoft Exchange, Google Gmail is the only email system that has prospered in the enterprise market over the past several years. Other enterprise email providers - Novell GroupWise and IBM Lotus Notes/Domino - have lost market momentum, Cisco closed its cloud email effort and VMware's Zimbra is only now refocusing on the enterprise space.

Google's journey to enterprise enlightenment, however, is not complete. Google focuses on capabilities that will have the broadest market uptake. Large organisations with complex email requirements, such as financial institutions, report that Google is resistant to feature requests that would be applicable to only a small segment of its customers. Banks, for example, may require surveillance capabilities that Google is unlikely to build into Gmail given the limited appeal. While Google is good at taking direction and input on front-end features, it is more resistant to the back-end feature requests that are important to larger enterprises. Large system integrators and enterprises report that Google's lack of transparency in areas such as continuity, security and compliance can thwart deeper relationships.

"Email is not a commodity, and cloud email is still maturing," Cain said. "We believe that, for most organisations, performing one more on-premises upgrade, which will take an organisation through 2014, is the most prudent approach.

A less-risky approach to cloud email is via a hybrid deployment, where some mailboxes live in the cloud and some are located on premises. This hybrid model plays to Microsoft's strengths given its vast dominance of the on-premises email market."

"The intense competition between Microsoft and Google will make both vendors stronger and enable them to apply cloud expertise to other enterprise cloud endeavors," Cain said.

"The rivalry will make it difficult for other suppliers to compete directly in the cloud email and collaboration space."

2012 launch for digital e-conveyancing in Australia

The paper chase for law firms handling property sales in Australia could be over by 2012, according to the timeline announced for development of a national E-Conveyance platform. Accenture has been appointed to design and build the long-awaited initiative.

Disparate efforts from state governments have been discontinued, with existing IP handed over to a new company – National E-Conveyancing Development Ltd (NECDL) - which is majority owned by Victoria, New South Wales, Queensland and WA state governments.

The system, known as "PEXA" (Property Exchange Australia), is intended to remove the requirement to use paper-based systems for completing property conveyancing transactions, including the transfers of title and mortgage-related aspects, and the various payments which are involved.

Despite significant effort over the past 10 years to develop a national conveyance platform, there has previously been no agreement on a single national system. Instead, parallel work has been going on in a number of states, including Electronic Conveyancing Victoria, the National Electronic Conveyancing Office and others. These streams of development have now converged under NECDL.

Alan Cameron AO, Chairman of NECDL, said the agreement with Accenture constituted a major step forward for e-conveyancing in Australia.

"NECDL has purposely sought to align the key stakeholders behind e-conveyancing and to bring a strong commercial focus to delivering a national system. We now have in place all the necessary elements to begin developing the system. All parties will now see some concrete development steps in delivering an e-conveyancing system for Australia.

"We are looking forward to continuing our dialogue with the key stakeholders in this project: property lawyers, conveyancers, banks, other financial institutions, information brokers, and all State and Territory revenue offices and land titles offices. These parties will be central to the successful implementation of a national system," Mr. Cameron said.

PEXA is expected to move into an initial operational stage in late 2012 with the first property transactions occurring after that date. Further details of the e-conveyancing platform were outlined in a discussion paper released by The Australian Registrars' National Electronic Conveyancing Council (ARNECC).

It notes, this "will essentially be a web-based "hub" for parties to a conveyancing transaction to electronically prepare and settle the transaction and to electronically lodge the documents for registration at the appropriate land registry.

"The NECDL platform will not directly alter or update the data held by a land registry, nor create a national land registry. It is a gateway or channel for documents to be presented for lodgment with the existing land registries."

Access to the system will be restricted to lawyers, conveyancers and lenders, and it will not be open to the general public.

Legislation will need to be passed by each state government before the e-conveyancing platform can be implemented, and a strong, reliable and trusted structure for Digital Signatures developed.

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Kofax flaunts $US1.9M Indonesian capture win

Indonesian government statistical bureau Badan Pusat Statistik (BPS Indonesia) has selected a Kofax enterprise capture solution to scan and process approximately 700 million documents.

The Kofax solution will be used for statistical data collection from over 460 cities each year in the world's fourth most populous country. The value of the contract to Kofax exceeds $US1.9 million.

BPS Indonesia is the government entity responsible for providing a variety of statistics related to economic growth, social development, unemployment, population and agricultural data.

BPS Indonesia will implement Kofax Capture, Kofax VirtualReScan (VRS) Elite and Kofax Transformation Modules (KTM) to scan and capture data from surveys, census forms and other statistics related documents and then export the images and data to an SAP system to be used as a repository and for access by its employees.

The Kofax software will enable BPS Indonesia to significantly reduce manual, labour-intensive processes, therefore improving the accuracy of its statistical reporting and making vital information more readily available.

"Kofax solutions provide governments with visibility into critical statistics, thereby improving the quality of information used to make decisions and enact change," said Alan Kerr, Executive Vice President of Field Operations at Kofax.

"Reduced costs and errors, coupled with faster, more informed decision making allows governments to better serve their constituents and quickly realise a measurable ROI."

Cisco acquires Versly Office suite

Cisco has acquired privately-held US startup Versly, developer of collaboration plug-ins for Microsoft Office applications, including documents, spreadsheets, presentations and email.

"Collaboration is a top priority at Cisco. With this acquisition we're enhancing our collaboration offerings and improving the user experience by integrating social technologies within the business applications individuals and teams use at work," said Murali Sitaram, vice president and general manager, Collaboration Software Group (CSG), Cisco.

"Furthermore, the integration with Versly will drive productivity improvements for organisations and their knowledge workers, many of whom are among the 600 million Microsoft Office users."

Cisco claims that there is a $US45 billion potential market for collaboration software, which the company sees as one of its top five priorities. Versly's software will be integrated into a variety of Cisco's collaboration offerings including Cisco Quad, Cisco Jabber and Cisco WebEx. For example, users will be able to receive automatic notifications within Cisco Quad when the content of a document has changed, escalate from simply reviewing a document to an instant messaging session through Cisco Jabber, or initiate a web conferencing session from a presentation through Cisco WebEx.

Cloud beckons for industrial strength SharePoint

Two industrial giants with deep links to Australia's oil exploration industry have signed up for Cadac Organice SharePoint-based engineering document management and control in the cloud.

FMC Technologies supplies subsea systems for Woodside Energy's Perseus-over- Goodwyn Project taking place offshore Western Australia. The company has approximately 12,500 employees and operates 27 production facilities in 16 countries.

Thomas Tazewell Atkins V, Manager Document Control at FMC Technologies, said "While evaluating solutions for a new project's document control system, FMC Technologies, Inc. needed a powerful solution that could be implemented in a timely manner. Cadac Organice allowed us to implement a flexible platform on an aggressive schedule that fully met our requirements. Their expert team worked diligently to insure our project's success."

Cadac Organice offers SharePoint-based solutions for engineering document management and control. It helps project-driven organisations like FMC Technologies manage (project) documents, including CAD, Office and Email, and it automates document control and tracking using transmittals and workflows.

Cadac Organice recently introduced the Cloud Solution, offering its functionality on a hosted SharePoint platform. The hosted solution can instantly be used and provides companies the flexibility to configure the environment according to their needs.

Another global provider of products and services to the oil and gas industry with extensive operations in Australia and New Zealand, Weatherford International, has implemented the cloud solution. Danielle Gardner, Document Controller, Weatherford, said, "Cadac Organice have provided Weatherford with a tailored document management system and have delivered this swiftly and as per our requirements. The Cadac Organice team have been extremely helpful throughout the implementation stages and have listened to our needs and provided the solutions we need to provide our client with an easy-to-use system interface and the ability to review Weatherford documents efficiently.

"The Cadac Organice Cloud Solution has provided Weatherford with the functionality to track documents, transmit them, use the inherent SharePoint functionality and gain insightful project management reports for our projects.

OpenText scores with NZ govt

New Zealand's Ministry of Economic Development (MED), currently busy coordinating the 2011 Rugby World Cup, is set to deploy an OpenText Enterprise Content Management (ECM) solution. It will deploy OpenText Content Server, paving the way for improved links with the general public and across all government agencies. The ministry provides advice to the NZ government and deals with a diverse portfolio that includes company registrations and insolvencies, issuing patents and trade marks, managing superannuation and the radiofrequency spectrum. It established the Rugby World Cup Office to help manage the 2011 event.

Once fully implemented, the OpenText Enterprise Content Management (ECM) solution will provide the MED with full content lifecycle management for any type of electronic document. It offers a single, central, authoritative repository for storing, managing and organising documents ensuring a greater degree of collaboration and compliance between agencies.

"We're excited about this opportunity to lead the way with a cutting edge solution. This will facilitate far better management of information and knowledge across the Ministry, and will pull together a number of fragmented and costly systems, saving us money over the long term," said Simon Lawrence, spokesman for the Ministry of Economic Development.

Browser-based PDF portal

activePDF has announced an update to its server-based PDF .NET web control tool that allows users to edit PDF files from any source, using any browser. Hosted on a user's server, Portal 2011 provides browser-based PDF viewing and editing capabilities without requiring third party software on individual systems or devices. Enterprise users can selectively disable the end user's PDF editing, printing and saving capabilities to allow full protection against unauthorised distribution or tampering with any documents.

Portal 2011 also provides a complete set of tools for uploading and inserting images, making annotations, drawing objects, creating form fields, inserting hyperlinks and more without the overhead of desktop software . The interface to Portal 2011 is able to be customised with custom JavaScript actions, custom callback arguments and alerts, and access built-in functions such as progress indicator, plus save and download.

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Solving the ECM puzzle

How are Australia/NZ organisations dealing with the complex challenges of enterprise content management (ECM) today? As part of our regular series of reader surveys, Image & Data Manager asks for your input to give some insights into contemporary information management.

Enterprise Content Management (ECM) is a broad term. A simple definition of Enterprise Content Management could describe it as Document Management "Plus." What are the elements that make up the "Plus?" What does ECM actually include?

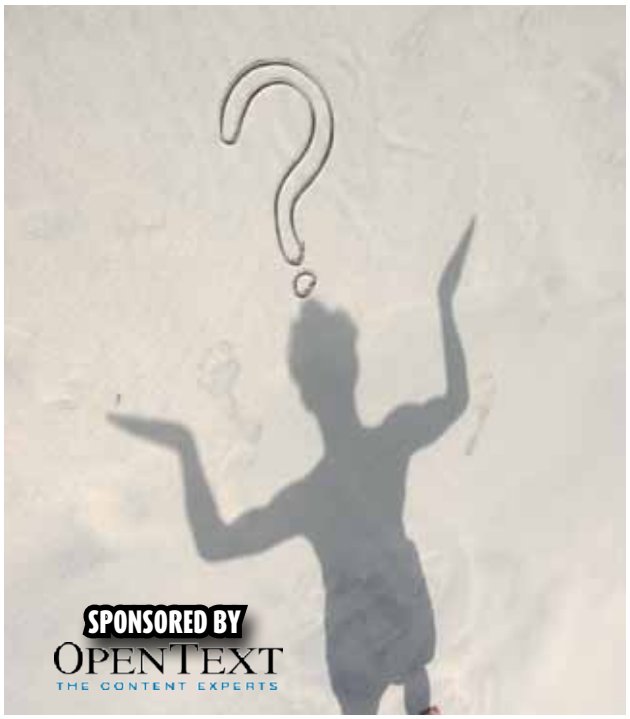
There was broad agreement that a true ECM solution must incorporate Web content management, while enterprise search and collaboration also figured high in the list of shared responses (see chart below).

One Australian government CIO currently underway with a SharePoint ECM implementation believes the ability for staff to easily find stuff is the main expected benefit.

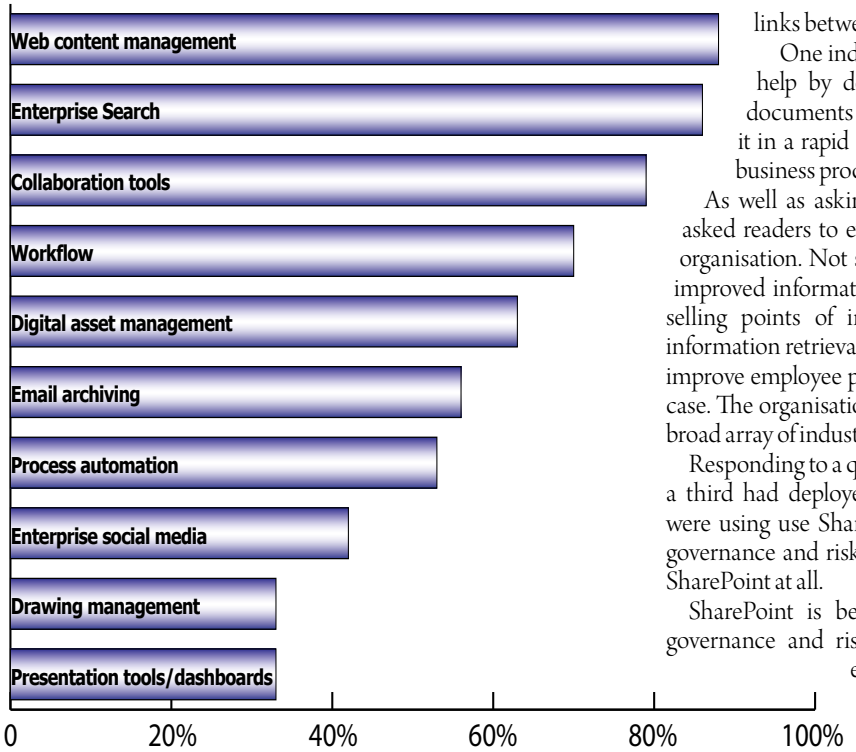
"ECM is the management of all records, regardless of medium - digital, hard-copy, electronic, video, audio etc.. ECM can deliver great benefits to the organisation - not least of which is ability to find records. It also helps cut down on paper use, particularly through implementation of good workflows and digital signatures."

Dr Pauline Joseph teaches at Perth's Curtin University and researches in the areas of design and implementation of electronic document and records management systems (EDRMS). Dr Joseph was an Information and Records Manager at Shell Development Australia Pty, prior to her career move to Curtin University.

Joseph believes that ECM should incorporate all line of business applications, i.e. SAP and any core business applications that manage staff leave, town council properties, student information databases, etc.



What are the elements that make up Enterprise Content Management (ECM), in addition to document and records management?



In addition to the accepted components of ECM, Joseph also lists knowledge management as an important element, as well as automated content recognition and links between various systems.

One industry consultant puts it succinctly, "ECM can help by delivering business information contained in documents to business decision-makers when they need it in a rapid and efficient manner that is integrated in the business processes, without any superfluous information"

As well as asking them to define what ECM does, we also asked readers to evaluate how ECM was actually helping their organisation. Not surprisingly, the top response held that ECM improved information access, followed closely by the key ECM selling points of improved regulatory compliance and faster information retrieval. Almost three quarters replied that ECM did improve employee productivity, an essential point in any business case. The organisations that responded to the survey came from a broad array of industry sectors.

Responding to a question about SharePoint deployment, around a third had deployed SharePoint as an ECM platform, a third were using use SharePoint alongside another ECM platform for governance and risk, and the remaining third have not deployed SharePoint at all.

SharePoint is being used alongside an ECM platform for governance and risk at one of Australia's largest mining and exploration companies, with more than 2500 IT users. According to the ECM Functional Lead, SharePoint cannot do it all.

"You need a matrix solution - SharePoint for collaborative information and for company records a traditional document management solution with archiving/publishing workflows.

"There are storage limitations for large organisations with the number of SQL Servers you require and also potential to have duplicated information across multiple libraries, you need a strict document management tool to manage retention and disposition of business records."

Urbis

Andrew Mitchell, National Manager, Technology and Knowledge at property consultancy Urbis, recognises the benefits of ECM, but does not see the economics of a major deployment adding up for his organisation.

ALMOST THREE QUARTERS REPLIED THAT ECM DID IMPROVE EMPLOYEE PRODUCTIVITY, AND ESSENTIAL POINT IN ANY BUSINESS CASE.

"We don't have substantial record-keeping requirements, or the legislative imperative that some organisations work under, so we haven't seen a major driver to get beyond fileshares. We do have an archiving issue and a storage demand keeps growing but that's not an ECM issue, it's more the impact on backup and recovery."

The content that must be archived at the end of an Urbis project comes from a wide range of sources and is stored in a variety of different formats, e.g. contract documentation, email, graphics, 3D flythroughs, GIS data.

Until the point at which it is collected and archived, content stays within the main office fileshares.

Urbis has developed its own .Net intranet platform that Mitchell is looking to migrate to SharePoint.

"This will give us a native platform to support information sharing and collaboration as well as some basic workflow for well-defined processes such as staff on-boarding," said Mitchell.

"But it's not primarily about the technology; it's about supporting changes in behaviour. People are willing to share but need a better platform to do it on."

Brookfield Rail

Collaboration has been the driving force for the deployment of ECM at WA's Brookfield Rail, according to IT manager Graeme Strickland.

Brookfield has been using the OpenText ECM Suite since 2009 and has 250 licensed users.

"Collaboration is the big key for us, as we suffered badly from management by email, with inboxes overflowing and getting up to 4GB in some cases, people losing information in email and unable to share within teams," said Strickland.

"We are also using OpenText to open up sharing of key engineering information that has been locked up in spreadsheets.

Previously known as WestNet Rail, Brookfield Rail is a rail infrastructure owner and access provider with a long-term arrangement to lease its network from the WA Government since privatisation in 2000. It operates over 5000km of rail lines in the southern half of Western Australia carrying ever growing volumes of minerals and grain to the region's six government-owned ports

The organisation had begun rolling out a document control and document management solution using SharePoint, but was not satisfied with the results. It is now using SharePoint as an intranet platform.

"We adopted OpenText ECM because of the version management and the ability to capture the document flow within the organisation," said Strickland.

"It's not just used for filing and general administration but all the other issues in relation to information management. In the old paper filing days, if a new person came along and you wanted to share information about a topic or a subject you would give them the file and tell them to read everything. When everything lives in email you can't share that information as easily and replicating the information through the business really becomes a problem.

"We wanted OpenText ECM to handle version management and make information available for sharing through workgroups. Our regional offices can be 600km away and they have a need to access the same information.

"We are using it to distribute links to documents internally and we have now implemented the Transmittals module to send controlled documents to contractors out in the field.

"It has changed people's behaviour in the way they handle information."

As well as general document management Brookfield has recently extended OpenText ECM with the Document Lifecycle Management for Engineering and Resources (DLM4ER) solution

"IT'S NOT PRIMARILY ABOUT THE TECHNOLOGY; IT'S ABOUT SUPPORTING CHANGES IN BEHAVIOUR."

from Australian consultants Fastman.

The Fastman DLM4ER package will be used to manage documents, drawings and associated business processes to support the Midwest Rail Infrastructure Upgrade, a $A500M investment in rail infrastructure around the Geraldton region of WA.

DLM4ER is a rapid deployment bundled solution that includes a mixture of OpenText and Fastman product and which provides functionality supporting key business processes such as Transmittals and bulk data management for Document Controllers. Brookfield Rail is also moving towards adoption of the Microsoft LYNC platform for instant messaging, VOIP telephony and videoconferencing.

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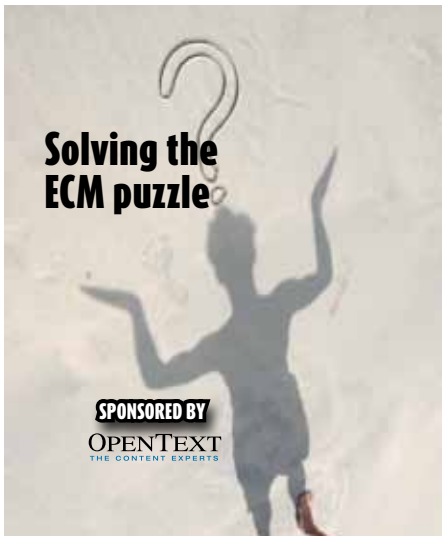


For one council records manager, reducing paper usage is one benefit of their ECM implementation, but not the sole justification.

"We never intended to be 'paperless'. If required, staff can print out as many copies of things as they like - we are more interested in business improvement / efficiencies and 'one source of the truth' where possible, rather than silos of information & duplication of records and effort.

"We are looking to implement SharePoint to use as a collaboration and intranet management tool. The ECM deployment is helping to reduce duplication & authenticity issues (version controlling); while providing records lifecycle management (destruction/ archiving etc).

"We are still working on integration with other business systems, and trying to reduce the inherent duplications (workflows, configuration idiosyncrasies, etc). There is still a long way to go to reduce user reliance on networks, email .pst files, and other alternative technologies."

Aecom

Up to 5000 Australian staff at engineering and design giant AECOM use SharePoint for project collaboration.

The Australian arm of the global multinational is using multiple instances of SharePoint for a range of different collaborative applications.

SharePoint is also being deployed as a repository behind the global Vignette Web content management system used by more than 45000 AECOM staff worldwide.

However Business Systems Manager Mike Harris does not see SharePoint becoming a single repository for all document types and email across the organisation.

Depending on the project, AECOM uses a range of content management platforms for managing delivery of projects. These can include the externally hosted Aconex product or an internal solution developed with Proliance project lifecycle software from Meridian.

AECOM is also deploying SharePoint to provide a collaborative space for other teams or business units inside the organisation that are not involved in a specific client project.

Built on SharePoint 2007, the project collaboration tool in AECOM Australia New Zealand, known internally as the Virtual Project Office, will be reviewed as it makes the migration to SharePoint 2010.

ENGINEERING AND DESIGN GIANT AECOM USE SHAREPOINT FOR PROJECT COLLABORATION

"The VPO has a lot of customised code behind it, and features custom developed dashboards that take in data from other systems such as our Oracle financials. Some of the features of 2010 may mean the code is redundant so we will take the opportunity to review the code."

"Wherever possible we will use an automated workflow."

CAD drawings and other specific content that originates in the many and varied creative applications used across the company continue to live inside these applications.

"Aconex and SharePoint aren't good for large CAD drawing files. The CAD tools have all the layering and referencing built in, once you take the drawings from their native package those references become broken."

Finalised drawings are exported as PDF and uploaded to SharePoint.

"If staff have to go to a few places to get files, that's not a huge risk as long as we have processes in place to ensure they are getting the right file. CAD programs have good document control features that are probably better than if they are migrated to live in SharePoint," said Harris.

The VPO then becomes a portal for the project storing documents used or developed by the project team and links to external tools.

"The VPO was really built for holding word processing documents, not massive CAD files."

Managing email is another challenge that Harris is looking to address once the migration to SharePoint 2010 is completed. At present all email lives in Outlook folders.

CFSGM

Roger Jin is ECM specialist at Colonial First State Global Asset Management (CFSGM), a subsidiary of the Commonwealth Bank of Australia. It has $A160 billion of funds under management, including many large shopping centres, and like its parent company is an EMC Documentum user underway with an implementation of SharePoint. More than 700 staff at CFSGM have been using Documentum for the past 6-7 years as a document repository. In recent times it has moved to add business process automation and collaboration capabilities.

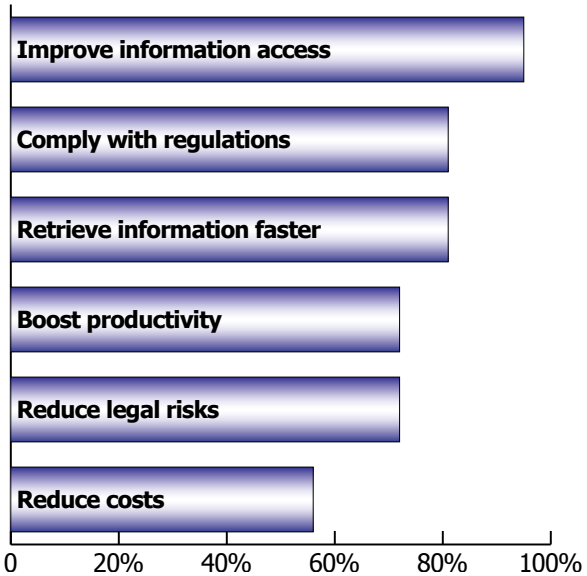
"For the past few years have been building a number of business critical processes on top of Documentum," said Jin. "We are now integrating Documentum and SharePoint to provide a full ECM solution."

CFSGM is also using SharePoint for its intranet and Web content management.

"Both platforms have their strengths. Documentum is a still a better business process solution and is stronger in records management but SharePoint's tight integration with Microsoft Office makes it more readily adopted for project collaboration".

Jin works as part of the Knowledge Systems team at CFGSAM that is working to implement SharePoint 2010 as a friendly face

If ECM is a solution, what problems does it solve?



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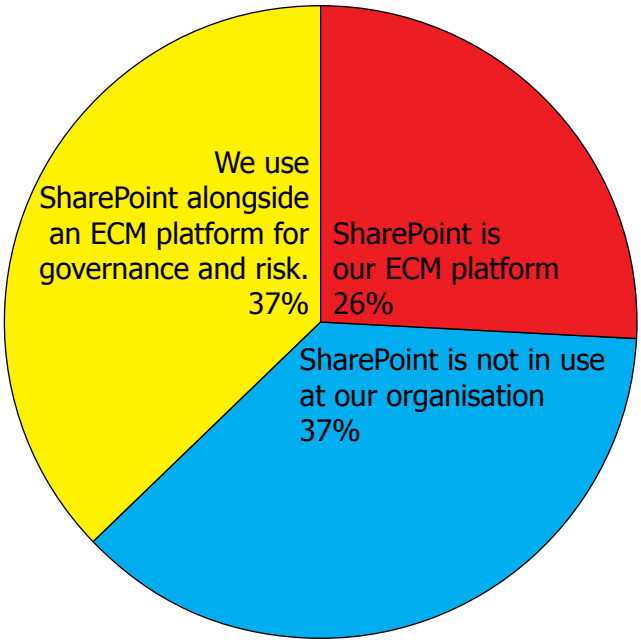
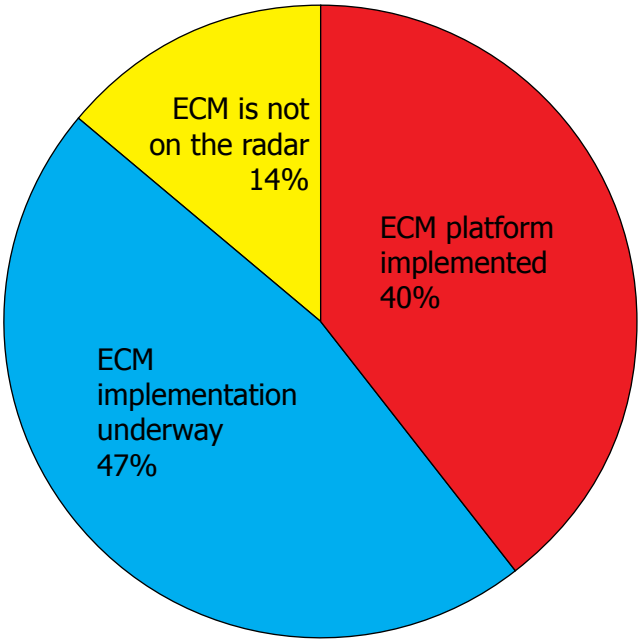
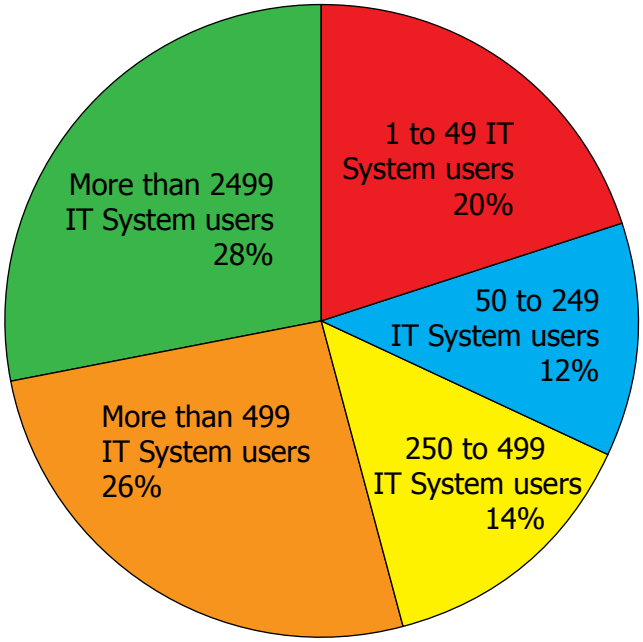
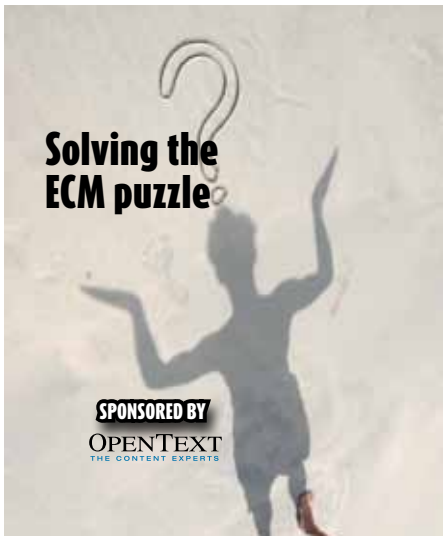








to users and ensure information lives where it should.

"We have a big job to define the information management structure, so they can know the right category to place a document into."

The Knowledge Systems team works with individual business units to define the rules for classification of information, so that staff can place information within the correct category in Documentum, whether it is email, word, pdf or images.

However any system based on individual judgement leaves open the potential for error and once documents are placed where they shouldn't, they be can be difficult to find.

"As automated processes are developed based on a certain document, it must be placed in the right category or the process is broken."

CFSGAM is currently migrating from SharePoint 2007 to 2010 which will add the potential to use features such as MySites and enable the platform' enterprise social media capabilities.

The widespread attractiveness and adoption of SharePoint for collaboration comes with some challenges, according to Dave Martin, director, Microsoft Solutions Group at OpenText.

"Organisations are beginning to realise that the very same reasons they like SharePoint — easy and self-serve site creation, straightforward content creation, improved collaborative work processes, productivity gains and the like — can also contribute to the challenge of sound information governance, storage growth, management and cost, and encumbered site deployment and provisioning.

"Information governance, the unification of multiple disciplines such as records management, archiving, and ediscovery, as well as the policies, procedures, processes and controls for managing the lifecycle of business information, is a growing challenge for organisations and a consideration for many when deploying Microsoft SharePoint.

"The ability to ensure that Microsoft SharePoint falls within the organisation's information governance strategy is rapidly becoming a key driver of successful deployments.

"Many organisations have already invested heavily in Enterprise Content Management (ECM) infrastructure and are actively seeking ways to include Microsoft SharePoint within a holistic ECM strategy.

"Additionally, they are exploring solutions to execute a comprehensive information governance strategy for Microsoft SharePoint that enables them to balance the familiarity, intuitiveness, and "speed-to-collaboration" aspects of SharePoint with those of ensuring consistent corporate policies are observed.

"Operational costs, database growth, and storage matters aside, the unfettered propagation of SharePoint sites and content presents significant challenges for legal departments, CIOs, and IT professionals charged with delivering on sound information governance strategies and organisational compliance programs.

"With mounting litigation across virtually every industry, an ever-changing regulatory landscape, and increased demands on IT resources and budgets, allowing SharePoint site growth to go unchecked is no longer a sustainable strategy," said Martin.

Context is key for ECM vendors

Many users of enterprise systems today, including enterprise content management, do not maximise their value, primarily because these systems are generally too hard to use even for the primary use cases they were meant to solve. Why? Because the context of the user, if once understood, can be lost over time with the changing of business needs, technology and industry demands.

Personas, processes, application integration and content types describe the context that we as ECM professionals need to design into our solutions in order for real value to be derived. As vendors, we know software can get diluted and that nothing is static, so continued focus on the customer is paramount.

Delivering a solution that is "easy to use" requires a very deep understanding of the business process, the types of content relevant to the process, and deep familiarity with the other applications involved. But most importantly, keeping in mind the skills, role and frequency of interaction of both the users and administrators of the system will determine if the solution is genuinely easy to use. This understanding helps greatly with knowing what not to put in front of a user as much as determining what they should see.

The variety of today's available platforms--from desktop, where you still get the richest interface, to browser and now to mobile--further muddies the waters on how to keep things easy from a usability standpoint. What ECM vendors need to remember is that context drives people to a particular access point, so we need to deliver an experience that is appropriate for the user via each of those access points.

As ECM vendors we need focus, but what we can't do is only see the trees and not the forest--allowing silos of content to fragment the user experience, such that a person is now expected to traverse numerous systems to complete their daily work.

In healthcare, for example, you have different types of content being managed by myriad of systems--EMRs, radiology, physician media and even medical equipment manufacturers--are providing specific formats and storage within the device itself. In this case, (and I am biased) ECM providers need to step up to the challenge and manage all manner of content, because only we have the full content lifecycle tools and the innate flexibility to do so.

Clearly, to make the solutions easy to use and manage, it's critical to partner with our customers who have the frontline expertise to ensure both the back-end and front-end integrations are such that the total user experience accurately supports the context at work. This is where we need to continue to focus on the deep understanding of real business context-personas, business processes, application integration and content types. With this knowledge and the determination to keep it simple on the surface for end-users, we can provide compelling value for organisational investment in ECM.

Darren Knipp is chief technology officer at Perceptive Software

OBS survey finds strong SharePoint uptake

A national survey sponsored by solutions provider OBS has found increasing investment in Microsoft SharePoint throughout Australian organisations. The survey was conducted during June 2011 resulting in over 300 respondents representing a cross section of public and private sector organisations.

This year's survey revealed a rapid uptake in SharePoint 2010 with the number of organisations deployed at 36%, up from 4% for the same time last year. Office 2010 deployment has reached a respectable 46% within the surveyed organisations, which suggests a strong link between SharePoint and Office deployment.

While most organisations initially deploy SharePoint for collaboration (87% of respondents), the survey indicated a strong appetite for organisations to deliver more using SharePoint. Areas targeted for investment over the next three years include; the use of SharePoint for Internet Web Sites (45%), Business Process automation (47%). and as a Business Intelligence platform (21%).

Another indicator of the growing importance of SharePoint within organisations is the growth in significantly sized installations. This year's survey saw a rise in the number of organisations with five SharePoint Servers or more to over 20%, up from 13% last year.

Laserfiche ECM maps the way for super fund

When Australian health industry superannuation fund, MAP Funds Management (MAP), went to market for a new document management solution, they found the answer to their legislative compliance and online document storage requirements in a Ricoh Laserfiche solution. For several years, MAP had recognised the value of an online document storage and retrieval solution and in 2005 had moved forward with the implementation of one such system.

Unfortunately, while the system's vendor sold it as a complete document solution, MAP soon discovered it was little more than a centralised storage point for digital documents.

MAP Network Manager Evan Paynter explained, "We ended up with a big bucket of documents with no OCR [Optical Character Recognition], workflow or strong document management capabilities," he says. "Pretty soon it was often a case of people saying: 'I don't know where to store this document, so I'll just push it somewhere into the document management system.'"

Having made the decision to evaluate other document management systems, MAP set out with the goal of identifying a solution that would afford it a flexible business tool that could be used to support all areas of the business.

"When Ricoh presented a Laserfiche-based solution, it had everything we were looking for," Paynter said.

"It had the open standards that would allow easy data exporting and integration with other systems, as well as OCR and workflow features that were sorely missing in our old system."

According to Paynter, the use of Laserfiche workflow is particularly important to ensure legislative compliance with regard to financial documents.

"Ricoh has worked with us on establishing a foundation for workflows that help us meet our compliance requirements," he said.

Secrets to enterprise success

ECM consultant Marie Felsbourg finds some common threads in the challenges facing organisations deploying ECM solutions

"It can't be that difficult" I hear you say and I would agree, but there are a number of lessons that can be learned from the experience of other organisations who have implemented ECM solutions into their business.

A recent global AIIM study reported that the top challenges businesses face when implementing an ECM solution are:

- Underestimated process and organisational issues
- Uneven usage due to poor procedures and lack of enforcement
- Lack of knowledge or training among internal staff
- Project derailed by internal politics
- Underestimated effort to distil and migrate content
- Excessive "scope creep"
- Failure to address taxonomy and metadata concepts
- Low user acceptance due to poor design or clumsy implementation.

THE STRENGTH OF THE TECHNICAL SOLUTION IS INCONSEQUENTIAL IF THE AVERAGE END USER IS NOT PREPARED TO ACCEPT THE NEW SYSTEM.

From our experience in both implementing and undertaking strategic reviews of ECM implementations in Australia, the findings of this global study are reflected in the Australian experience. One of the additional challenges for Australian companies is the geographical distribution and remoteness of some users, particularly in the mining and engineering sector.

By developing a strategy that addresses the identified implementation challenges, organisations can achieve significant business benefits through the implementation of an ECM solution. Regardless of the project size, implementing an ECM requires much more than a technical solution. The nature of content-based solutions means that the business processes and policies that govern how content is managed must be brought up to date to reflect the new approach.

The strength of the technical solution is inconsequential if the average end user is not prepared to accept the new system. When this happens, the system is bypassed or used sparingly, and the expected business benefits are not achieved. Technology is just one component essential for a successful ECM implementation. Of equal importance is the focus on the people aspects, changes to business processes and organisational structures to support the new system.

Development of an ECM strategy and roadmap must include business requirements, solution scope, anticipated business outcomes and a breakdown of how to deliver the expected business benefits. Each phase of the roadmap needs to be aligned to a business benefit.

There are a number of essential components to implementing an information management framework. These include policies (clearly defining who owns the information), management (defining who is accountable) and organisation, i.e. appointing a person who is fully accountable to the Information Governance Board or Executive Board, and responsible for delivering the expected benefits of the implementation project or program.

Business Engagement should be driven by a Change Management leadership team which consists of nominated business representatives. These include representatives from the organisational operational management team and end user representatives to ensure business engagement and open communication with all stakeholders in the project.

It is best to limit any customisation by leveraging product functionality "out of the box" and aligning existing process with the solution, adapting the process if required. The recommended strategy for delivering relevant, successful, and achievable enterprise content management is based upon adopting appropriate Best Practice (*see chart below*). Many of these initiatives can be delivered as discrete solution components, some as 'quick wins'.

Change management, focused on the process changes, is vital at all stages of the implementation ensuring people are ready, willing and able to embrace a solution that fundamentally changes the mindset of an Enterprise.

Dealing with the process challenges requires a defined and consistent workflow, with a framework for naming conventions, metadata and repository structure & use, at an enterprise level, that is automated as much as possible at the user level.

Challenges span all parts of the enterprise, but a successful ECM solution will allow disparate groups, including off-site groups, to have the benefit of knowledge, technology and process that exist in other parts of the organisation.

Marie Felsbourg is the CEO of Astral Consulting Services, with a 30-year career as a business consultant in the Information Management industry.

ECM Implementation Best Practice

Metadata	Have defined models for different business uses	Use controlled values (Automation)	Ensure at least a minimum set of metadata is applied to all content (Automation)
Repository Structure	Structure the repository by organisational structure or by process/function	Use a single source for data storage	
Process	Define and enforce processes for content creation, content types, metadata definition and use (minimum document types and minimal metadata input). Keep the process simple	Implement controlled (restricted) processes around the implementation of the repository	Base processes and controls around document life cycle and higher level business activities
Usability	Use automation & workflow to guide users through tasks	Implement legible and intuitive system interfaces	Interface with existing desktop tools

Mining at the ECM coalface

Rio Tinto shares some of the lessons learnt in developing a holistic approach to Information Management.

Collaboration and document management is a challenge for any organisation, but when you have a staff of more than 65,000 people operating globally in over 50 countries, it is elevated to another level entirely.

"Safety is our number one priority and the right information is a critical supporting requirement," said Rob Ritchie, Global Information and Collaboration Application Manager, Rio Tinto.

"In this current period of rapid business growth we need to support a growing organisation through knowledge capture and easy retrieval.

The Rio Tinto information management platform utilises a series of EMC tools for document and records management, workflow and project collaboration. These are managed globally as a single toolset that also includes portal and intranet technologies, forum-based communities of practice (COPs), wikis and blogs, enterprise search and team collaboration.

Documentum is the primary Document Control solution with over 10,000 active users per month. SharePoint is also deployed. There is also extensive use of Documentum eRoom for project based collaboration, with 8500 active users per month.

"We believe Documentum's architecture provides a very strong architecture with the rest of our production systems," said Ritchie.

Rio Tinto has over 100 Information Management initiatives in its global program presently, with a similar number of initiatives having been completed over the last five years.

"There is a huge amount of activity and a recognition of the value that information management can bring to the business.," said Ritchie.

"We have reviewed our IM activities over the past five or so years and there have been some common findings; firstly, that these initiatives are notoriously hard to execute. Only 30 to 50% ever succeed. Secondly we found that this failure is often because the scope of projects is not well managed and requirements are poorly defined. Often times people didn't know why they were doing what.

"People would think they were getting a document management system and instead a portal is implemented. There are lots of cases of mistaken identity.

"Significant behavioural change is required with this technology and there is a limited availability of the appropriate skills."

Rio Tinto has developed a mantra for use when assessing IM projects at the outset, namely Find, Manage and Share. These are the three key use cases when implementing an IM system.

"Your are trying to help people find information," said Ritchie. "You want it to be available, and easy to access and manage, while ensuring appropriate integrity and using it for the right process. Finally you need to create collaborative ownership and improve the quality of that information through the power of the group.'

"Success is in finding the interrelationship between these three."

"Fragmentation is the enemy of Find, where people have to look in too many systems. If you have hundreds of web pages, SharePoint repositories and Documentum Docrooms, the poor user doesn't know what to do. The question must be answered holistically"

"POORLY DESIGNED/IMPLEMENTED TECHNOLOGY WILL BE A SIGNIFICANT HURDLE FOR CHANGE ACCEPTANCE." ROB RITCHIE, GLOBAL INFORMATION AND COLLABORATION APPLICATION MANAGER, RIO TINTO

For Rio Tinto this is not just a matter of looking at a better document store, as often the solution requires access to data from production systems, for instance where engineers need this data to manage equipment maintenance.

"One of the major success factors is to understanding what you are trying to achieve. This sounds basic but it can prevent you failing at the first hurdle.

"Finding information has been our challenge for a long time, putting information in a single repository does not work. Successful IM solutions try to find who is looking for what."

One of the changes that Ritchie can see evolving in the world of information management is the shift of responsibilities to a departmental level, as IM becomes more deeply embedded in an organisation.

"I believe the information manager of the future will sit in the departments. In the past we called them document controllers or content maintainers, they went by a myriad of names. Enterprises today need to have someone in business area who understands how information is used and controlled, to make sure that specialised part of the business is gaining benefit from their information management."

"Different business areas create their own priorities for managing their information at a localised level. We need to understand how portals and enterprise search all work together for holistic information management."

Transparent records management with ECM

When it comes to electronic records management, too many Australian and New Zealand organisations are forced to make a choice between designing a repository layout that allows users to find records quickly and designing a layout that logically satisfies the retention schedule. It's the risk versus productivity issue, and it makes it hard for records managers to do their job without interfering with departments' line-of-business activities.

By Kimberly Samuelson director of Government Strategy for Laserfiche

An enterprise content management (ECM) suite that includes both records management and workflow automation modules can help.

The information needs of records managers and general users are very different. Records managers are typically more concerned with the rules of retention than the importance of records from a business perspective.

In many cases, the layout of a formal records management file plan is related to the fact that different retention schedules apply to different types of documents (e.g., insurance records, tax documents and employment applications). For example, a records manager might be required to organise human resource (HR) documents by type.

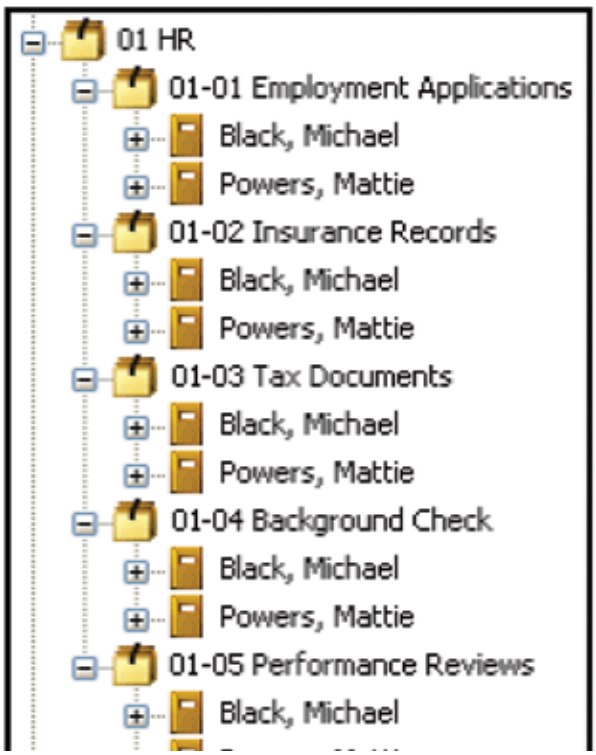
Unfortunately, this type of layout is cumbersome for general users. For example, an HR representative who wants to print all documents for a specific employee would have to open more than a dozen different folders in different locations to search for that employee's documents in a layout that's organised by document type.

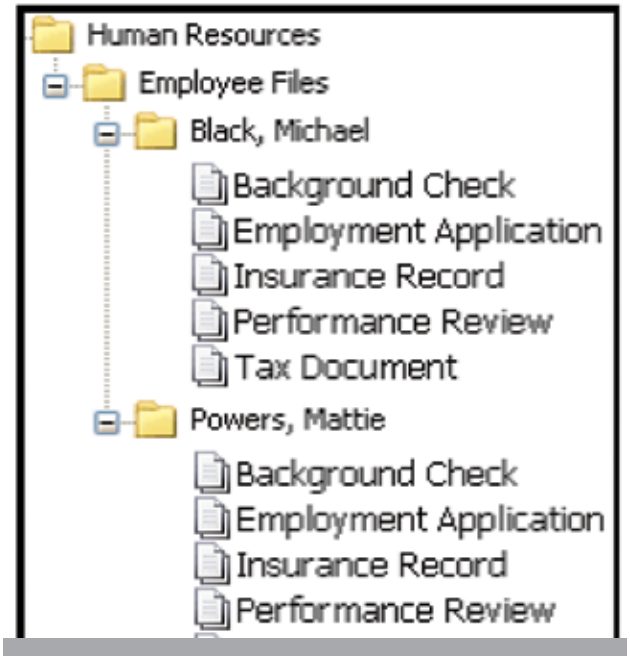
General users typically prefer to organise documents based on content. An HR rep, for example, might ask to organise employee documents inside folders with names corresponding to the employee in question.

Because it's difficult to balance the needs of records managers with general users, some organisations resist moving to an electronic records management solution altogether. In fact, a recent IDM survey of records and information managers found that the major perceived challenge in implementing electronic records management comes from end users resistant to change. According to a 2008 survey conducted by The Economist Intelligence Unit, one of the major causes of resistance to change in the workplace is that new processes don't map to the way employees think their jobs should be done.

So while moving to an electronic records management system might make perfect sense to records managers, if the system makes it more difficult for end users to access important information and efficiently perform their job duties, executive support will be lacking.

A best-in-class ECM system that includes both records management and workflow automation modules can provide the functionality to enable transparent records management (TRM), an approach that allows records managers to create a file





Different views of the repository for the Records Manager (left) and the standard user (above).

plan and manage retention schedules without interfering with any department's line of business. TRM is "transparent" because it enables general users to see through the cumbersome records management layout to the layout of their choice. TRM allows organisations to configure multiple views of the repository to satisfy records management requirements while insulating general users from file plan complexities. This way, records managers retain control over the way information is categorised and filed, while general users access a folder structure organised more logically for their needs.

How TRM Works

Separate folder structures are created in the repository: one for records managers and one for general users. Record series are created inside the records management folder structure.

Using the entry access rights afforded by the workflow automation module, the records management layout is only visible to records managers and the document management layout is only visible to general users. Administrators can see both. The workflow automation module automates the setup of these multiple views, including filing new records into the appropriate record series. This automation ensures security, since general users are working with shortcuts—not actual records.

With TRM, an organisation can meet all of its records management mandates without compromising the ability of its staff to access the information they need to make fast, informed decisions.

"Transparency," however, isn't the only benefit associated with TRM. Decreased costs and increased productivity are two additional advantages of this approach.

Due to the amount of time it takes, the process of classifying and filing records is typically the most expensive component of records management. In many organisations, this issue stems from the following problems:

The records management group is understaffed and unable to manually classify all the content created by the organisation.

Users responsible for creating content are not concerned with records retention policies and are not interested in or able to learn a non-intuitive classification scheme.

TRM solves this problem by automatically classifying documents as they are created. Users responsible for creating content define the document's type using a required field. The workflow automation module uses this information to automatically classify the document (i.e., to determine which records management settings should apply) and move it to the appropriate record series or record folder. As a result, cutoff and disposition eligibility dates are automatically calculated and assigned.

The workflow module automates the process of classifying and filing records and providing document access to different types of users by:

- Capturing a document into a folder named "incoming documents."
- Assigning metadata to the document to determine its type (e.g., insurance record, tax document, employment application). This information is leveraged to create a record folder in the appropriate record series and move the document into the new record folder. This step provides document access to records managers.
- Creating a shortcut to the document and routing it to the content management section of the repository. Users who are not records managers can access the document using the shortcut without being exposed to the records management layout.

It is the automation afforded by the ECM suite's workflow automation module that makes TRM such a cost-effective way to boost productivity. TRM makes compliance with the records management plan easier on an enterprise level, and it also simplifies and automates record creation, classification and filing, so records managers can spend time on other tasks.

Digital push at WA Regional Health

WA Country Health Service is rolling out a TRM Context electronic records and document management system (eDRMS) to more than 1000 users across the state in a major paperless initiative. The set-up of digitisation hardware and software includes a new 'Digital Mailroom' employing a Canon DR-5010C A3 scanner with i2 Scan software.

WA Country Health Service is also using i2 Conversion Server to convert historical non-searchable TIF and PDF electronic documents into compliant and searchable PDF/As. This has ensured all electronic documents saved into the eDRMS are content searchable and assisted in better retrieval and flexibility.

"We are selling our solution as a document management solution, as when you start to talk about records management and compliance people tend to go to sleep." Mark Roberts, Manager Records Management

According to Mark Roberts, Manager Records Management WA Country Health Service "The Conversion Server and i2 Scan applications are really easy to use and are very flexible. Support for both products has been excellent we are really pleased with the performance of both applications"

The Records Management team of WA Country Health Service is responsible for managing all non-patient records outside the boundaries of Perth, and is underway with a deployment of the TRIM Context EDRMS. As part of its deployment it is also using a range of specialist products from Australia's Kapish Software. Kapish TRIM Explorer takes the functionality of HP TRIM and delivers it within Windows Explorer interface, while Kapish TRIM Easy Link provides simple hyperlinks to TRIM records and documents.

"We are encouraging staff to use TRIM as a single repository for all non-patient records," said Roberts.

More than 15 Canon DR-2010 desktop scanners are being provided to office across the state to assist with the paperless transition.

"We are rolling out 100% electronic environment, so all paper-based records are getting scanned and will be disposed of after minimum of six months," said Roberts.

"Its a big change, as staff currently have a fair reliance on shared drives and email inboxes, and there is a lot of unstructured data in these repositories. We have a migration and cleanup strategy for shared drives, and we need to get staff to think about placing email into structured folders within Outlook so when they do get TRIM they can map those directly to a folder. Once they make the migration those emails will be removed from their inbox and placed in TRIM as a record."

WA Country Health has been scanning documents for some years in addition to filing them on paper. The i2Conversion Server takes those historic images and converts them to 300dpi searchable PDF/As. It also converts TIF images that are sent and received via a fax gateway to searchable PDFs and stores them in TRIM.

"i2 have had a good think about what the market needs with their Conversion Server product," said Roberts.

Streamlining the grain market

One of Australia's leading grains commodity managers, the Emerald Group, has transformed the way it communicates with its customers via an outsourced document generation and content management solution from Computershare Communication Services.

Headquartered in Melbourne and with 80 employees, Emerald Group is a key player in Australia's export of wheat, barley and other grains. Represented in all grain regions with 15 offices in regional Australia, it is a wheat exporter and also provides financial products for growers and buyers of grain.

It has a massive job in creating transactional documents for its clients that include Payment Advices, Harvest Loan Statements, Tax Invoices and Delivery Statements. There are over 32,000 mail packs sent out annually, that's approximately 2,600 per month involving 150,000 images. Traditionally these have all been produced and mailed in-house.

Due to increasing time and resource demands, Emerald Group needed to improve the way it communicated with its customer base.

Preparing 1,000 of these mail packs alone could take up to a week and was heavily dependent on staff to manually coordinate all printing, insertion and mailing.

"The process was not streamlined and therefore a waste of time, money and resources in producing the required volumes," said Ayhan Oguzhan, Commodity Administration Coordinator, Emerald Group.

Computershare re-designed the way the information is presented on documents, and is able to provide faster processing turnaround through its high capacity document generation platform. Before the reformatting (above), invoices had to be folded in half and mailed in a very unconventional 'pocket' envelope (completed by handline) which was a lot more time consuming and costly. Below is an example of a redesigned invoice.

"The print quality and paper differences from using multiple suppliers were also starting to impact our brand."

In addition, Emerald Group felt the overall presentation of the grower communications did not reflect the professionalism of the company. To reinforce this feeling, Emerald Group's Call Centre operators had been receiving numerous calls from the growers explaining their dissatisfaction with the correspondence document layout in that it was difficult to read and understand.

It was also important for the Call Centre staff to have improved access to grower information to respond to queries efficiently. On the flip side, the growers themselves needed to have access to their own information held by Emerald Group - if they did, the number of queries coming into the Call Centre would diminish.

As a result, Emerald Group identified that they needed to: improve the professional look and feel of their grower communications for clarity and greatest impact to reduce Call Centre enquiries and grower dissatisfaction; streamline print and mail costs for efficiency and cost savings that can be better spent elsewhere; and improve the way grower information was provided to Call Centre staff and to the growers to ensure both parties were equipped to win in a competitive marketplace.

Mark MacLeod, Computershare Communication Services' National Solutions Manager, said "The way they were doing it previously was a manual process that was taking a lot of time and was onerous on people. We provided an automated process where we receive a data file from their core back office system; compose a more functional and engaging document that is easy for customers to understand, and then deliver the documents in print and online through our hosted enterprise content management (ECM) system."

Computershare Communication Services has its origins in providing shareholder communications for companies on the Australian stock market, but now has over 1,000 commercial clients using its hosted ECM solutions, including major insurers, banks, superannuation providers, and utilities..

All of the documents generated for the Emerald Group are placed in a hosted ECM so they can be accessed online by the buyers and growers as well as Emerald Group's call centre staff.

"Emerald Group customers have a complete electronic archive of all their documents, and will soon be able to download transactional data directly into their systems, such as Agrimaster and manage log-ins for their advisors, such as accountants. The platform we have provided to the Emerald Group not only streamlines their operations, but also the operations of their growers," said MacLeod.

Now, when growers contact the Call Centre, the operators can easily retrieve the exact document the grower is calling about to effectively respond to queries. On the other hand, the growers can retrieve documentation relevant for them at any time from the ECM without having to contact the Call Centre. Prior to this capability, Call Centre operators had to work across numerous systems and databases to retrieve information about any given grower.

Since the solution was implemented, the time to process 1,000 pieces of communication has shrunk from a week to a day, and there has been a 30% reduction in printing and stock costs.

Managing an information offensive

Australia's Department of Defence faces a unique set of challenges in dealing with current-day demands for information, explains Tony Corcoran, Assistant Secretary FOI and Information Management.

Ever tried getting information out of government departments or big companies? Well, you might strike lucky but more often than not you'll feel a sense of frustration. Not because the people you're dealing with are deliberately trying to be difficult, but more likely because they have a hard time finding the information you're after. If you believe that large organisations, both public and private, have cohesive and integrated information management systems, then think again.

All large organisations are slowly realising and coming to grips with the demands of 21st century information flows. The change from paper-based systems, which were time consuming but methodical, to electronic systems, which have developed in piecemeal fashion over the last decade or two, has been chaotic to say the least. One of the biggest problems has been that changes in human behaviour (or cultural change) has not been at the forefront of the switch to automated systems. Technological change has tended to lead behavioural change, with the result that many employees do not understand the systems they are supposed to control – nor, in many cases, are the systems designed to accommodate that understanding.

Defence is no different to any other large organisation. In fact, its systems have been described as "the broken backbone" of the organisation. A concerted effort has been undertaken over the last two years to change that. But big changes in ICT require big changes in behaviour – and that's where Defence's information management strategic framework comes in.

The Strategic Framework, endorsed last year by Defence's top-level board, puts in place the principles for information management in Defence – spanning its three domains of corporate, intelligence and warfighting. It's a start and not at end in itself.

Now the hard work begins to translate rhetoric into practical real steps to address current inefficient, unaligned and unilateral processes. The vision is 'to get the right information to the right person at the right time to enable the right decision to be made'.

It's not going to happen overnight, more likely it will take five years to get to the end of the beginning of the process, so to speak. And, probably, a decade or so to be in a mature position. In the meantime, the world won't sit still. Defence will have to respond to the dramatic changes occurring constantly in the political, legislative and technological spheres.

The Government's freedom of information (FOI) reforms and Web 2.0 thrust are providing some specific obligations. Defence must also meet the Government's latest digital transition strategy for records management. All of which present challenges across the public sector.

"The corporate information management challenges being faced by Defence are common to many other organisations. These challenges are significant, but slow, inexorable progress is being made across the information management spectrum." - Tony Corcoran

Defence doesn't have all the answers – indeed, I am not certain that anyone currently does – but we all need vigorous debate about common issues faced in all public and private sectors.

Tony Corcoran will elaborate on the Defence Dpartment's information challenge at The 3rd Annual National Records and Information Officers' Forum 2012 to be held from 27th February to 1st March 2012 in Melbourne. See brochure in this edition of IDM or visit www.liquidlearning.com.au.

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ACMA tunes into a new digital channel

Appropriately for a body that regulates the vast array of digital content delivered to Australians via broadcasting and broadband, the Australian Communications and Media Authority (ACMA) is stepping up to the challenge of managing its own exploding data use. IDM asked Deputy CIO Stephen Bounds to reflect on a migration to SharePoint 2010 and RecordPoint electronic record-keeping.

The ACMA is a statutory authority within the federal government portfolio of Broadband, Communications and the Digital Economy. It has principal offices in Canberra, Melbourne and Sydney and employs approximately 690 people.

SharePoint 2010 was implemented July 2010 and the organisation uses hp TRIM 6.25 to manage electronic and physical recordkeeping. In March 2011 the ACMA commenced a migration to RecordPoint for electronic record-keeping.

"There's been a strategic shift in direction at the ACMA over the last couple of years to standardise our software platforms and to move towards a more Microsoft-oriented stack," said Bounds.

On the way it has adopted Microsoft Dynamics CRM and SharePoint and a number of other tools, including the use of .NET for software development.

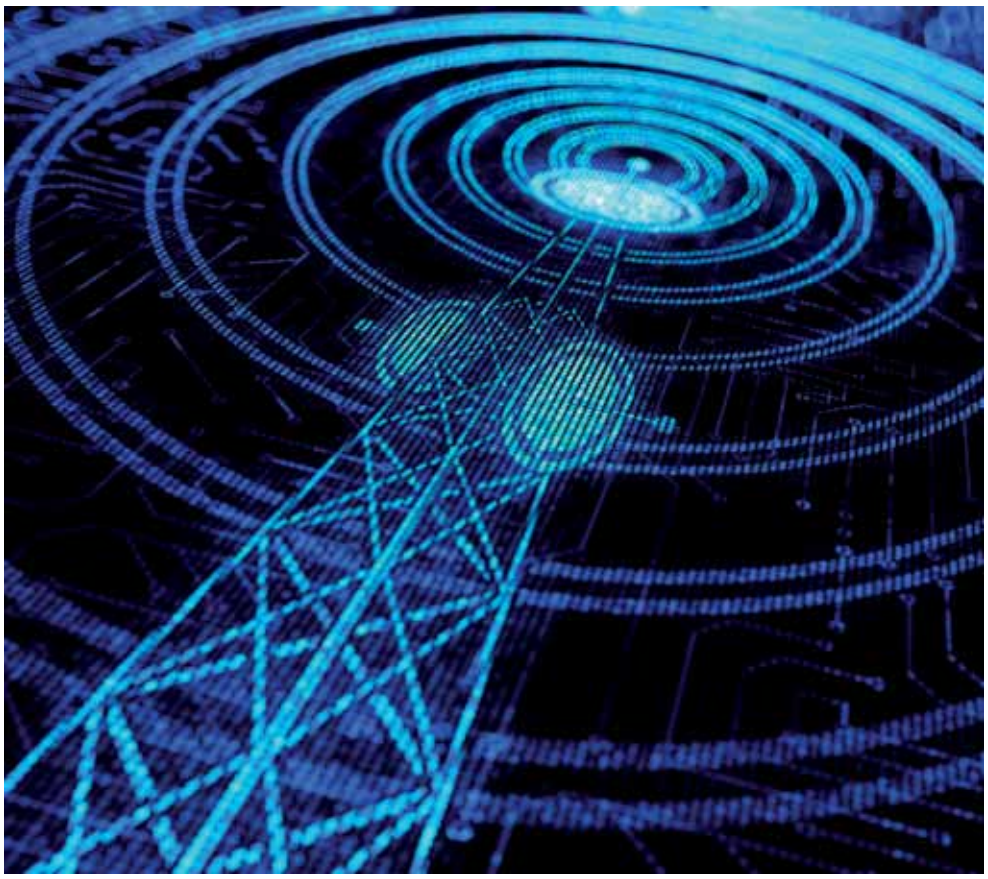
"We wanted to look at the logic in also maintaining hp TRIM as separate platform for record-keeping, because obviously SharePoint has been pushing record-keeping as a feature of their own.

"We made the choice that it would be a strategically appropriate to adopt RecordPoint as a third party enhancement to SharePoint which provides ISO 15489 record-keeping compliance."

"In 2010 we migrated to SharePoint 2010, Windows 7 and 64-bit servers running SQL 2008 R2. TRIM's software wasn't compatible with the latest Microsoft technology at that point and it forced us to hold back on an Exchange 2010 upgrade.

"When TRIM released an update with SharePoint 2010 compatibility, unfortunately you could either have 2010 compatibility or Windows 7 compatibility, not both. That forced us to stay with TRIM 6.25 instead of 7 until those issues were fixed.

"That was a frustrating period of around 6 months, and during that time we decided, well, we're not confident that TRIM's going to continue developing at a pace that we're comfortable with. Since it's not strategically aligned with the rest of our platform, let's look at what we can do to reduce that dependency."



RecordPoint has now been deployed in production, although the ACMA chose not to do a mass migration to minimise the immediate impact on internal business processes that are still tied up in the TRIM model.

"While we want to eventually migrate everyone to RecordPoint, more immediately we want to capture records that aren't being captured or properly managed. Our staff still have a lot of shared drives and use email as a de facto document store. Initially we think we can improve our overall record-keeping situation and reduce non-compliance with RecordPoint as an additional tool.

"The other strategic reason for choosing RecordPoint was to make SharePoint a suitable document management platform for other business applications. We have an

"WE HAVE AN AMBITIOUS PROGRAM TO REPLACE MANY OF OUR CURRENT APPLICATIONS ... IN THE NEXT 2-3 YEARS." - DEPUTY CIO STEPHEN BOUNDS

ambitious program to replace many of our current applications using various combinations of bespoke and off the shelf software in the next 2-3 years.

"All of these projects now have a mandated standard that if you are doing document management and record-keeping of any kind, you must integrate with SharePoint and use RecordPoint as the back-end.

"Having a stack we can easily re-use is a big advantage. For example, we've now enabled RecordPoint on our Enterprise Project Server which means that any time someone uploads a project plan, it automatically gets catalogued and stored on RecordPoint.

"Similarly, we have a project that needs to accept signed statements from our stakeholders endorsing their annual statements of income for licensing fee purposes. These will also be stored and captured in the RecordPoint system."

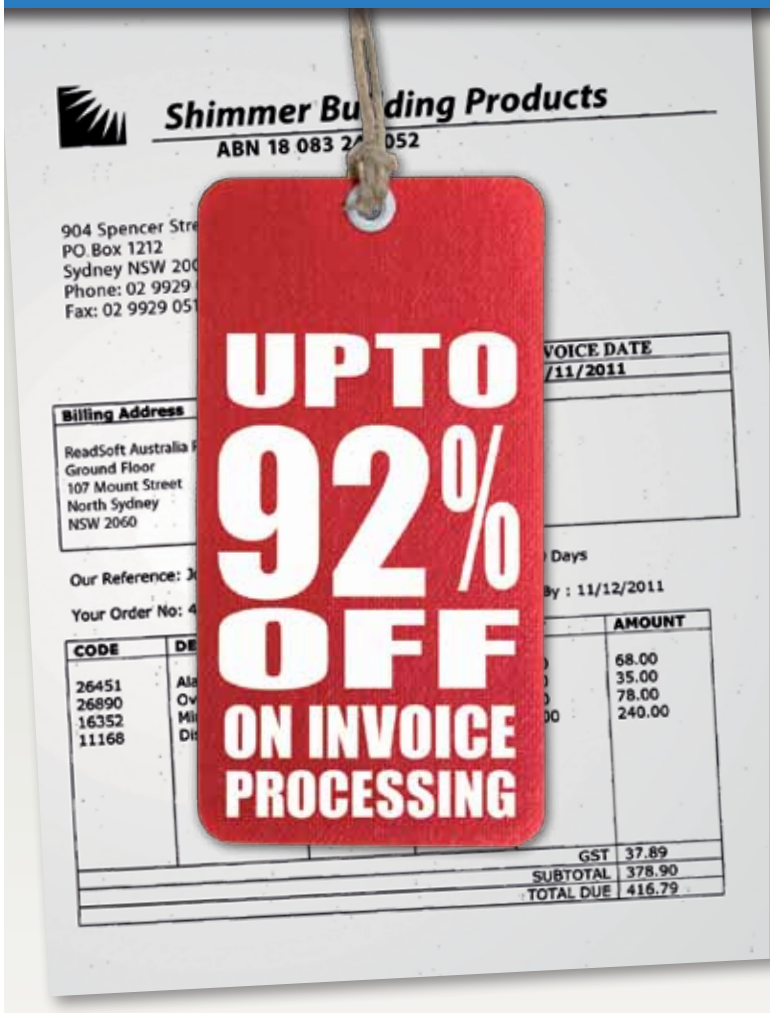
Integration roadmap

With the initial deployment competed in August, the next 12 months will focus on getting RecordPoint bedded down and operationally understood so that new processes can be easily integrated into the overall system.

"We will be working individually with each section of the organisation to identify how they can best use the strengths of SharePoint for their business needs, while still having sites with compliant recordkeeping thanks to RecordPoint," said Bounds.

"Longer term, we expect TRIM to become a pure archive for physical and electronic records. At this point only our core records team and team that manage their own paper records will have access to TRIM, no more than 30 to 40 people. Everyone else will use SharePoint and RecordPoint for their recordkeeping.

"In March 2012, we will re-evaluate whether we have progressed enough to move away from TRIM as a primary corporate recordkeeping tool. However, it is a complex piece of change management, so I expect this to be a 12-24 month process."



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TRIM'S foreign affair

Rolling out an electronic document and records management system (EDRMS) at Australia's Department of Foreign Affairs and Trade (DFAT) was no walk in the park, as consultant Richard Legge explains. HP TRIM is now providing DFAT with a centrally managed repository for more than 4800 users spread over 110 different locations around the globe.

Cultural change is hard enough in any large organisation, but when you add in the diversity of geographies, languages and time zones that DFAT must embrace, the implementation becomes even tougher.

"One of the things that we recognised early is that EDRMS projects are less than 20% technology and over 80% change management. Implementing backend infrastructure is quite easy compared to implementing a complete change to the way people do things in their day-to-day business at their desktop or mobile device," said Legge.

"So we actually spent a lot of time on marketing and communications. We employed two professional communications and marketing people from the private sector. They were heavily involved in the initial development of material and continue to be involved throughout the project.

"The other thing we did was recognise that we are selling something. We're not just implementing a new way of doing things, we're selling it to them. We have to have users who want to come on the journey with us."

To assist the selling, DFAT implemented marketing program for the EDRMS project, one which has its own logo, a brand name that users can recognise, training, and support for users as they commenced working with system.

"One of the things we learned early on is that the rollout of an EDRMS is not the highest priority event that a foreign affairs and trade department will ever have. A classic example of that came while we were in Port Moresby rolling out a pilot. There was a plane crash on the Kokoda Trail, which immediately became priority number one for the entire staff at the High Commission.

THE DEPARTMENT IS NOW WORKING TO TO CAPTURE ALL RECORDS ELECTRONICALLY

"That led us to change our implementation model to take into account that those business units were usually going to have higher priorities and we were not one of them." said Legge

Over the past two years, DFAT has moved from using TRIM to manage paper-based records to implementing it as an EDRMS. The department is now working to capture all records electronically, although there is no intention to scan the large archive of paper information. Some of the geographies that DFAT operates in still have a paper requirement. For example some African countries will not accept electronic documents as a formal document. They must retain the paper documents.

"There is an increased occurrence of things arriving electronically, but DFAT is at the early stages of implementing business workflow," said Legge.

"The two years to implement this project has been very aggressive but we are currently on schedule and a little under budget in 2011. That has been as a direct result of the implementation model that we've chosen.

"The model is such that, if we're implementing in Washington, and the foreign minister decides to visit, or a crisis develops then we can down tools and get out of the way. The way we've structured our implementation allows us to do this, because we've broken up the sites into zones. Therefore the account manager handling Washington, is also managing up to 12 other posts. When they can't be working with a particular post, they have others. The provided for increased efficiencies."

"A key factor in the success of the implementation for an EDRMS is to remove the alternative for storing documents. Prior to the EDRMS, users would have had access to what's called the G-drive or the corporate network drive. Often the way that data stored on a network shared drive is very personal; users organise their folders in a way that typically only they know how to navigate and find information.

"DFAT has a mobile workforce that can be in one location for two years and then they move on. When the next person comes in to replace them, if they don't understand the way their predecessor organised their folders, they can't find information nor can they store their own – therefore they create a completely new structure. The EDRMS incorporates a Business Classification Scheme, including naming standards, rich metadata descriptors, word and document content indexes; to provide a structured way of filing and searching for information."

No matter where staff go in the Department, there is now the same structure for filing information. This means that staff can be mobile and are able to recognise the structure when they get to a new location, no matter where they go in the department.

DFAT had considerable legacy information store on the network shared drive. All the information that was on this "G-drive" had to be either migrated into EDRMS or removed.

"We typically found 10+% were duplicates and 40% was not required to be filed, so typically less than half was migrated.. So far we've recovered over 3 terabytes of storage space to be reused," said Legge.

"Another key factor in the success of the implementation is that no users are allowed use the EDRMS and hence save documents until they have completed basic user training. What we've learnt is that the users who complain the most about a product are the users who don't know how to use it. And so if you can't use it, you don't get access to it, simple as that. The basic training is also a method to make them aware of their record management responsibilities hence the reason why an EDRMS is being implemented."

This requirement for training presented some unique challenges for DFAT, considering the nature of some of its locations. For a user in Canberra it is easy enough to attend classroom training, but local staff in Baghdad, for example, must turn to self-paced study or logon to the DFAT intranet and watch videos.

The network architecture presented its own challenges. DFAT has a large proportion of satellite links to ensure a high level of availability in countries with either poor terrestrial communication links or politically unstable environments

Satellite links are high latency and not suited to interactive document management products. So the challenge arose to provide a facility which allows for an efficient and responsive document management and collaboration system that could be centrally managed over the network.

THE NETWORK ARCHITECTURE PRESENTED ITS OWN CHALLENGES. DFAT HAS A LARGE PROPORTION OF SATELLITE LINKS

"We were able to deal with this by implementing a design which has a distributed architecture for records with centralised management from Canberra, and centralised backup of the system for business continuity," said Legge.

"During the time of the project, one of our overseas sites lost their local IT infrastructure through a fire. Within an hour of being notified of this disaster, we were able to provide users at that site access to all their information we had stored in Canberra through a temporary resumption site."

The job of deploying the EDRMS has required that the DFAT implementation team develop a number of specific applications and support tools, such as automated analysis of storage and integration for 3rd party products. DFAT has some specific business rules, in particular about the handling of email and the removal of draft documents from its system, which have been incorporated in to the EDRMS through extensions to the TRIM product using the extensible software development kit (SDK).

For environments where using applications based on the SDK is not practical (or possible e.g. mobile devices), and to provide an interface in to DFAT EDRMS which automatically applies those DFAT's business rules, DFAT built a web service. This provides a programming interface with which to retrieve information and declare or update records. DFAT has incorporated products in to the TRIM EDRMS to handle image metadata.

"Implementing an EDRMS into any organisation is never going to be easy. Implementing an EDRMS into DFAT had quite a few unique challenges; and although this was a complex and difficult journey it has been very be successful," said Legge.

Other challenges moving forward are social media. How do we capture social media in a record-keeping system? And which parts of social media are actually records of the department?

"It's not all about technology, although technology does have a role to play. The leadership from above and the support it has offered has contributed extensively to the ongoing success of the EDRMS implementation into the department. Equally, ensuring that users experience the benefits of the product through policies, and importantly the lockdown of the network drive, ensures that the Department can expect the return from its significant investment now and into the future."

Richard Legge was previously EDRMS Project Director for DFAT.

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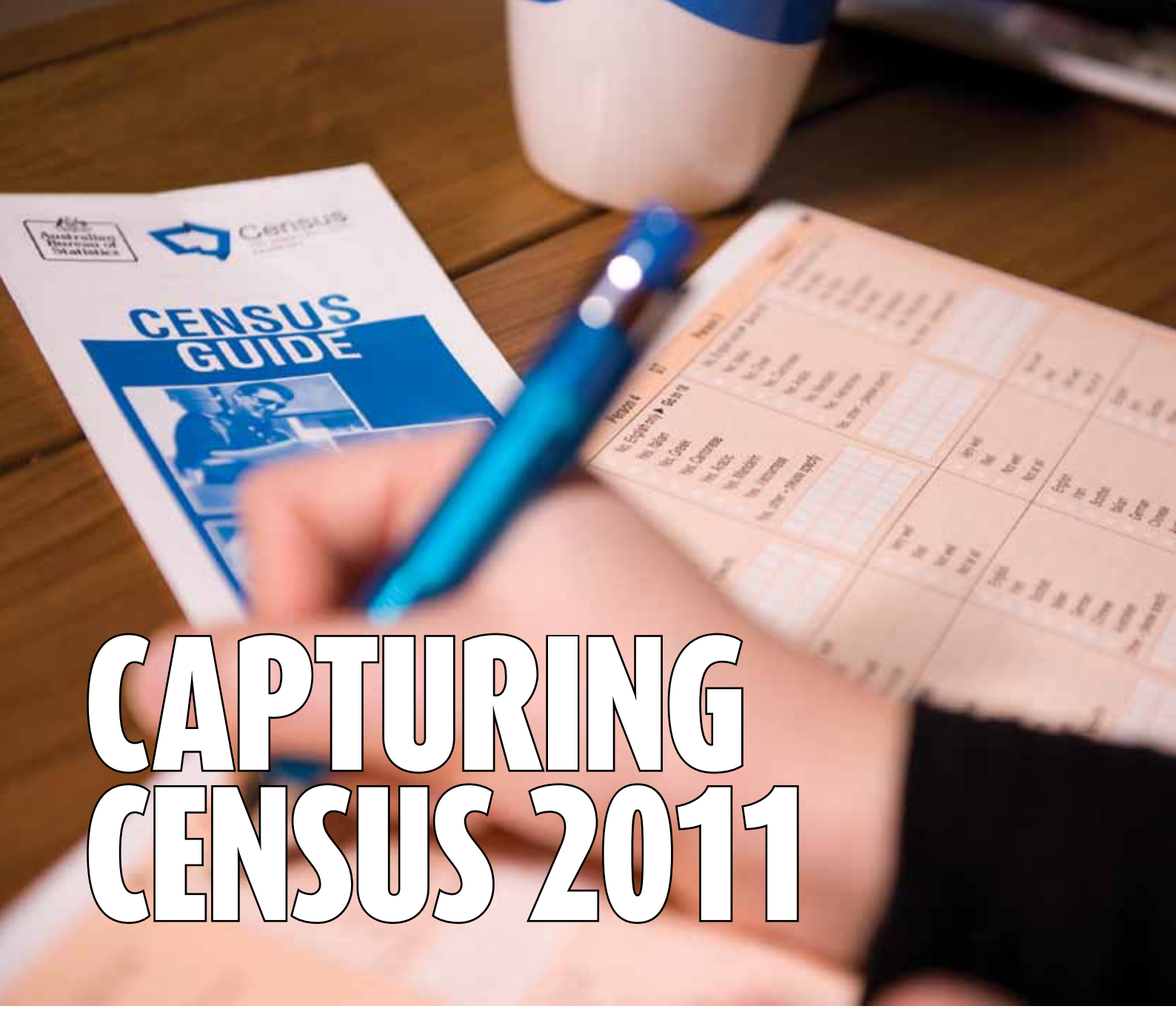

CAPTURING CENSUS 2011

With census forms flooding in to the Australian Bureau of Statistics' Melbourne Data Processing Centre at the rate of up to three container loads a day, IDM spoke with the Executive Director Andrew Henderson to learn how the massive job of capturing and analysing Australia's census data has evolved since the last census in 2006.

Any profile of the job of conducting a census must begin and end with statistics, and the figures for Australia's Census 2011 are mind boggling.

The job of undertaking Census 2011 was budgeted to cost $440 million, or around $19 for each and every Australian, with around a third of that figure required to pay an army of 43,000 field workers who distributed and collected census forms.

In the end this added up to around 8 million census forms, which must be shipped to Melbourne for capture and processing. The containers will keep arriving until January 4, 2012 when the last shipment of census forms from WA is due in.

From then on the ABS will be on a tight schedule to collate the first release of demographic data that must be used by the Commonwealth Government in June 2012 to allocate GST revenue to the states. More complex analysis of more nuanced data will be released later in 2012.

The job of capturing the data submitted on paper census forms is being accomplished by over 750 staff utilising a fleet of 11 new Kodak i1860 high volume scanners acquired for the 2011 Census.

Australia's 2011 Census was a landmark event, marking 100 years of national Census taking in Australia. It also represents the third census undertaken with IBM's Intelligent Forms Processing (IFP) software, first adopted for Australia's census in 2001.

The workload for the ABS Data Processing team this time around was eased somewhat by the strong uptake for online submission of census forms by Australians.

"We are very happy with the success of the eCensus," said Henderson.

"We got a response rate of 28% which is well up from 9% in 2006."

The ABS outsourced the job of capturing eCensus submissions to IBM Australia, while guaranteeing privacy by ensuring that data was encrypted from the time it is submitted online to the point at which IBM handed over the data to the Melbourne Data Processing Centre.

There were a huge number of variables that hinged on a strong eCensus takeup rate, as every percentage point either way had a direct impact on the size of the task of managing the paper-based submissions in Melbourne.

THE JOB OF CAPTURING THE DATA SUBMITTED ON PAPER CENSUS FORMS IS BEING ACCOMPLISHED BY OVER 750 STAFF UTILISING A FLEET OF 11 NEW KODAK I1860 HIGH VOLUME SCANNERS

The ABS budgeted for 750 staff to handle the job of processing the forms, which will number around 8 million. This is comprised of around 52 million double sided pages, scanned as 104 million individual images (down from 65.5 million pages/131 million images in 2006).

"We banked on at least 20-25% being submitted online, but we are very happy with 28-30% we ended up with. IBM was tooled up to deal with a fair bit more than that and would have been comfortable with a 40% eCensus takeup rate," said Henderson

On Census night on Tuesday, August 9, IBM was processing over 100 online submissions per second at its peak.

To accommodate the huge growth in online submissions, IBM implemented a significant change in the architecture of its eCensus solution in 2011.

This involved a move to a client-side browser application from the server side application deployed in 2006. This significantly reduced the necessary server capacity from IBM, which handled the load in 2011 with three dedicated P-Series servers.

2011 AUSTRALIAN CENSUS
Australia's Population 22,493,120
9.8 million individual households
14.2 million printed Census forms
Census cost $440 million.
Census collectors 43,000

Once the data is captured from census forms by the Kodak scanners, IBM's Intelligent Forms Processing (IFP) software is used for optical character recognition ((OCR) and Intelligent Character Recognition (ICR).

One major new introduction for 2011 was the scanning of coloured maps from Census forms filled out by collectors.

These were mainly required for rural and regional areas where the collectors would mark the location of a property on a map of their collection district. Once the maps were scanned, the ABS computers could compute the latitude and longitude of the mark and cross-reference it to the listed address.

"Capture rates are make or break for us. If they don't meet expectation then we have to go out and employ more people." - Australian Bureau of Statistics' Executive Director Andrew Henderson.

"Maps became much more important in 2011," said Henderson.

"We needed to be able to geographically capture colour maps very accurately, and that's worked very well."

There are two main elements to the processing of the paper Census forms: capturing handwritten addresses and additional answers to questions that relate to birthplace, religion, occupation, etc.

The ABS is finding recognition rates are 10% up on where they were in 2006.

"We are getting autocode rates of better than 90% for capturing addresses," said Henderson, who believes there a number of factors causing the improved recognition rates.

"Its a combination of technology and the way we are using it," he said.

"Our own server capacity has moved on so far in five years, and the there have been great improvements in the quality of scanning with the new Kodak scanners, and the quality of IBM's recognition technology.

"But there are also improvements in the way we are able to modify our own procedures. We can adjust very rapidly as we get a better understanding of how certain tasks are being processed."

The ABS undertook a dress rehearsal in 2010, but this only involved a test run of 20,000 households, which does not really give a true indication of what it would be dealing with when it comes time to process 8 million forms.

(Continued over)

The ABS outsourced the job of capturing eCensus submissions to IBM Australia.

"All our testing has shown that autocoding, when its working well, gives us better quality outcomes than human processing. If you have 600 people looking at 9 million forms a degree of variance and inconsistency comes into it," said Henderson.

"Using OCR and ICR gives us much better confidence in the quality of the data and buys us time to spend analysing the data, so if we recognise a need to fine tune our indexes and classification schemes we can roll back and reprocess very rapidly."

Data analysis

As in 2006, data stored in Oracle databases will be analysed using SuperCROSS, a high-end analytical package from Melbourne company Space-Time Research (STR).

The ABS will also be using an additional package from Space-Time Research called TableBuilder. This will allow visitors to the ABS web site to specify their own queries.

"In the past, because we didn't have a tool like TableBuilder, we had to manage confidentiality at a micro level. So there were tens of thousands of predefined outputs and you had to select the nearest to what you wanted, whereas now high end users will now be able to specify very detailed tables.

"The tool also ensures we can overlay the appropriate level of confidentiality so we can protect individual information."

In 2006, Web-based visitors could not gain access to the complete set of raw Census data, the ABS instead loaded the database with the million or so tables (approximately 30 per collection district, each highlighting demographic factors such as age, sex, race, and language spoken) produced by SuperCROSS. Full access and real-time queries would have imposed a significant processing burden on the ABS servers.

"The tools we now have for analysis, like the latest version of SuperCROSS, and our increased server capacity, mean we will have better understanding and be able to provide high end users with better intelligence on the quality of the census data," said Henderson.

While the job of tacking the 2011 Census data is accelerating in pace, the ABS is well advanced in planning for the next census in 2016. In fact those decisions on the platforms and architecture changes will need to be bedded down in late 2012.

Handheld devices for Census data collectors are one thing definitely on the horizon, and the experiences of Brazil have been a great influence here. For its 2010 Census, Brazil equipped its data collectors with 225,000 PDAs and notebooks equipped with GPS receivers that could pinpoint the exact location of a household.

The ABS looked at introducing ePen technology for the 2011 Census. This would involve the collectors using specialised paper and a pen which contains imaging technology along with standard pen and paper (ink) functionality. Data is still recorded in the paper record book, but as it is also imaged, and can be uploaded to the ABS near to the time of it's capture. The ABS decided it was not ready for introduction for the 2011 Census, but will look at it again for 2016.

The GPS data was cross-referenced with satellite images to ensure that responses are correctly geo-tagged, and meant that mapping was considerably more accurate. Handheld devices are on the agenda for Australia's next census in 2016.

"When you are deploying 40,000 units in field you need confidence in their robustness and the ability to support them," said Henderson.

"One of the things that has become clear in the past few censuses is we need to gain a lot more real time intelligence from our 40,000 collectors in the field .In 2011 we used SMS to tell collectors that we have received an eform from a particular house so they don't need to go back there.

"For the next census, we need to bring the householder into the loop, so when someone rings our inquiry centre we can tell them why the collector has not visited yet and when they will.

"We need to close the loop and have better understanding of what is going on in the field and a move to handled devices will help here," said Henderson.

Social media: break in case of emergency

The summer of 2010/11 saw a rash of natural disasters across Australia. The floods and cyclones that devastated the lives and property of so many have left lasting impacts on not only the landscape and our memories but also on the expectations of government.

By David Schulz

The information needs in emergency situations has done much to validate an emerging use of Web 2.0 tools including social media. In response many government agencies are establishing, formalising or expanding a social media presence. This is inevitable and in many ways admirable. However, engaging with social media without a clear plan and understanding how this fits within a broader engagement strategy is not without risk.

Effective emergency management requires a rapid flow of accurate information to allow people to plan and respond to events that are unfolding quickly. What became clear last summer was that Twitter and Facebook were satisfying the information needs of many people more effectively than the official communication channels of Council and State Government emergency management teams.

Advice of warnings and evacuations were reaching the public ahead of the official notifications. People seeking information from agencies' websites and formal channels of information were poorly served. Council reputations in particular suffered at this perceived failure to communicate with the speed their communities expected.

On the other hand, those agencies that had an established social media presence were able to rapidly and authoritatively respond and reaped massive reputation gains. The anti-authoritarian streak that runs deep in Australian culture makes it all the more extraordinary that hundreds of thousands of people 'Like" the Queensland Police Facebook page!

In response we are seeing many agencies plunging into social media and establishing presences in a range of these new media channels. The problem with many of these initiatives is that there is no clear reason driving the push to social media.

At best the social media initiative, in isolation, doesn't build genuine engagement or a sense of community and withers on the vine. At worst, a social media presence that is not part of a broader, well conceived community engagement program jeopardises the organisation's reputation and credibility and exposes it to the risks that arise from poor information management.

If messages in social media channels are not consistent with each other and traditional communications, the organisation's credibility will suffer. If responses received via social media are not acknowledged and actioned, people will be frustrated, feel rejected and the reputation of the organisation will be damaged.

If your organisation cannot demonstrate what information was provided over social media it risks not being able to defend itself from claims of loss arising from reliance on information that was allegedly provided, or not provided through those channels.

The experience of the Gov 2.0 Taskforce and their approach to information governance is instructive. The Taskforce sought to 'own' the environment in which collaboration and discussion took place. Sure they had a Facebook page and a Twitter stream but those channels were used purely as a means to publicise.

Information already held in other locations was pushed to these channels. When people sought to respond, they were directed to sites they managed directly. This is important from a management and information governance perspective.

Nothing novel was placed on social media. That made these channels records management neutral. Incoming communication was directed to their own online engagement platforms. These

It is fitting that what was learned about the use of Web 2.0 tools such as social media in the context of emergency management is being documented using those same tools. The Emergency Management 2.0 Wiki (http://emergency20wiki.org/), launched on the 23 August, is gathering what has been learned and defining the vision for how communities and agencies prepare for emergencies and respond when they happen. This valuable information source will also document the records management implications of rapid communications in emergency situations.

were selected to provide the moderation and structure that allowed meaningful use of this information and reduced the risk of non-constructive discussion. These tools were also selected based on the ease in which information could be extracted and folded into existing record management processes and systems.

Government agencies need a holistic engagement program that recognises new expectations in their communities. Social media is useful as the outgoing communications channel for the engagement program. The information pushed to social media will ideally originate from an online engagement system that provides the destination for people when they respond.

An online engagement system will allow you to readily get a better measure of community sentiment across a more representative sample of the community at much less cost and effort than a public meeting or traditional surveys. A robust online engagement platform will also give your agency a holistic view of all the responses from any individual so you can over time build a complete picture of each person and the issues that are important to them.

The lessons from the summer of 2010/11 are clear. Our communities expect more agile response and rapid communication from all levels of government, particularly in times of crisis. Social media is a useful tool in responding to this expectation. Social media must form part of a broader engagement program that utilises the power of online engagement and minimises risk, effort and cost.

David Schulz is Industry Solutions Manager at Objective Corporation

Insuring a digital future

An EMC Captiva solution is providing digital capture and workflow for rt health fund, a provider of health insurance for workers in the transport and electricity industries for more than 120 years.

One of 37 private health funds in Australia, rt is currently providing services to around 51,000 members. There are close to 60 staff based across three different locations, managing more than 1,300 pages of transactions a day, including hospital, medical and ancillary claims, as well as new membership applications and a wide variety of change requests from current members.

The processing load was up to 2000 claims and applications per week when the decision was made to assess the possibility of moving to a digital platform.

High levels of membership growth between 2008 and 2010 added to pressure on management who were looking to maintain high levels of member service and turnaround times, without adding significantly to the staffing pool.

Tony Delahaye, Manager Information Systems at rt health fund, said the major surge in membership could not have been managed with existing resources, without the paperless solution.

rt has adopted the EMC Captiva platform for capture and processing of paper-based claim form data. Claims that arrive by post, fax or email are captured and automatically classified for processing, reducing the need for manual intervention.

Scanning is accomplished using two Kodak i260 series scanners that had been in limited use by the fund since 2004. ARM arranged for Kodak to extend the warranties due to the low volume of scans on the machines. The scanners are directly integrated to EMC Captiva and no middleware software is required.

The system is currently able to automatically classify around 50% of documents received by the fund, and the aim is to eventually see this figure increase to 100%.

Captiva automatically extracts the membership number from all forms and confirms its validity. In 95% of cases, the header page and invoice are all that is required. For the remaining 5%, any additional supporting documents are classified as attachments.

A new template is only required for major providers, while those that only send in a small volume can utilise a generic template called freeform. Captiva is able to automatically extract machine-printed and hand-printed text from each document.

The solution automatically validates captured data against data sources, business rules and applications. Manual validation is also performed to inspect errors or to enable data correction and maximise data accuracy before delivery to the fund's P21 core operating system.

Workflows within P21 then distribute the scanned images to claims assessors with the relevant screens pre-populated for

"Customer service is crucial for us in this market which is crowded with alternatives." - Tony Delahaye, Manager Information Systems

processing.

CEO Matthew Moore said, "Businesses like ours receive a constant high volume of paperwork that requires manual handling and processing. Anything we can do to make those processes more reliable, consistent, accurate and efficient is vital to delivering excellent service for our members and the healthcare providers we interact with.

"The move to scanning technology has made those business processes more reliable, replicable, consistent and more easily auditable.

"Importantly, the business is also more readily scalable – we have effectively disengaged the growth of the business from the need to match that growth in staff numbers. For a lean, mid-sized organisation such as ours, this has been essential for the management of growth and to enable future expansion."

rt invested $450,000 for the software, hardware and implementation, with Advanced Records Management chosen as the implementation partner for the project. Completed over a full year in 2010, the rollout was staggered in three phases, occupying 3,200 person-hours and directly involving 20 staff.

For a small organisation, the project involved a major commitment of time and expenditure.

Tony Delahaye said, "We needed to implement the project using many of the same people who were integral to the day-to-day running of the business. We didn't have the luxury of a dedicated project team that could focus 100% on the implementation, which would have been ideal."

However, the payoff has been spectacular. In spite of a 40% increase in the volume of hospital claims received in 2010, rt has been able to cope with just a small increase in staff while achieving significantly reduced backlogs.

"We have also observed a reduction in Access Gap claim rejections from Medicare Australia, which has saved us time spent investigating claims. In addition, we have reduced our archiving costs by being able to destroy paperwork after six months, and the fact that we are not distributing paperwork has led to a reduction in postage costs. A secondary benefit has been that we are able to quickly retrieve scanned documents rather than having to recall them from archiving on the odd occasion when we need to investigate an error or dispute."

Surviving the flood

Customer service gains have been delivered by enabling frontline staff to view the progress of transactions immediately. Yet another benefit arose when the 2011 Brisbane floods affected the fund's Queensland office. Staff were able to work from home until the office was relocated.

The project was not without its challenges, as moving away from paper workflows presented major change management issues, and required patience from all involved.

"We chose the Captiva platform for our claims workflow because of the additional products and services EMC offers," said Delahaye.

"EMC provided great support and an excellent project methodology, and it fit all our requirements for corporate governance. They have a lot of health insurance customers in the US which gave them some familiarity with this industry, even though there are significant differences between the health insurance systems in each country.

"The high recognition rates for handwriting have been a bonus, as we have many older members who have been with us for decades, and they prefer to send everything in handwritten. We are looking to increase the level of straight-through processing as we move forward with the project."

"One of the things that we learned late in the day was that it makes a significant difference to processing speeds if you capture documents laid out landscape instead of portrait.

"As this saves three seconds per page, with our pages at 1,300 pages per day this saved around an hour a day."

Healthy solution for high volume invoice capture

One of the first healthcare providers in regional Victoria, South West Health Care (SWH) has implemented a Kofax-based invoice capture solution.

The solution from Sydney's Xcellerate IT was required after the number of invoices had doubled to 4000 per month with the implementation of an Oracle based finance system and centralised PO solution for four warehouses.

"Staff at outlying warehouses needed to access invoice information stored at the central location and time delays in handling and resolving queries were impacting on supplier delivery. We did not have a method in place to track invoices sent from suppliers" said Liz Bramich, Assistant Finance Director.

SWH was looking for a straightforward solution that could allow a scanned image of supplier invoices to be attached to the invoice entry/query form in Oracle and then be tracked and reviewed easily by all staff involved in the process.

"We had to overcome a few obstacles due to our own IT team's priorities", said Bramich. "Understandably, we had to ensure compatibility with the Oracle FMIS and Healthsmart corporate requirements."

The project was approved in mid-December 2010, commencing in March 2011 and live in early April 2011. With the scanning system SWH is able to enter invoices immediately into the Finance system and then holds occur automatically if goods are not received or price variances occur. Supply staff then review hold reports and can access the invoice details from the attachment(s) so invoices do not need to be distributed and can then be tracked and reviewed easily by all staff involved in the process.

Limited storage space resulted in a time consuming process to access hardcopy of invoices so this has been immediately eliminated. Copies requested by staff can now be quickly emailed from the attachment already scanned in Oracle or high volume areas can be given direct access to Oracle inquiry to query invoices independently of our Accounts Payable staff.

"It is still early to identify dollar savings. However, certainly the business goals of achieving a simple solution to resolve invoice queries promptly was obvious from the first day, due to the ease of accessing detailed information from the source documents electronically," said Bramich.

The Kofax-based system deployed by Xcellerate IT provides an enterprise platform that in the future can be enhanced to enable automated capture of invoice header fields, with validation of transaction and supplier details into Oracle Financials.

"As staff have now been able to see firsthand the ease of attachment and retrieval of details of supplier purchases, it is intended to roll this solution out to at least three large agencies and three small agencies in the region," said Bramich.

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Postcards from a real-world AP automation journey

Two years on from its initial implementation of a ReadSoft AP automation solution, Orica reflects on the impact it has had on company operations.

Orica is a multinational company with regional Accounts Payable departments spread across the globe. The business has installed solutions linked into two global SAP systems based in Australia/NZ, Singapore and North America. Orica is currently processing 340,000 invoices globally per year with further expansion on the horizon. All invoices that arrive in Australia, Singapore and North America are passed through Readsoft's software for verification before being transferred into their "invoice control centre" which resides inside SAP.

From here, further automation by way of invoice and purchase order matching, discrepancy handling, and workflow for approval tasks are deployed, providing total visibility of each stage of the process for stakeholders. In some cases, the process can take as little as eight minutes from arrival to being processed inside SAP if invoices are received as PDFs by email.

"The system is flexible enough that AP resources can be shared globally if necessary," said Mara.

"For instance, an invoice that arrives in Canada can be actioned by an AP person in Australia, or, can be electronically forwarded to any SAP user around the world for authorisation."

"We now have minimal paper on desks, and mail sorting and document archiving and storage has been heavily reduced."

The percentage of invoices that arrive electronically versus conventional post differs in different global locations. Over half of the 19,000 invoices that arrive in Australia each month are delivered by email, whereas in Singapore, the percentage is much higher at around 95%.

This divergence reflects the fact that the Singapore operation is a new business for Orica, where email delivery of invoices was driven from the start, whereas the process of transforming the way it interacts with over 22,000 suppliers in Australia is still evolving.

Orica is just now beginning the job of converting those supplying paper invoices in Australia to emailing PDFs, no small task given the thousands of individual suppliers involved and the length of time that Orica has been doing business this way. The company was originally a supplier of explosives to the Victorian goldfields in the 1850s, so it has some history behind it.

Orica's global AP automation rollout is winning fans in Canada, where local staff are no longer required to undertake trips to retrieve paper invoices from an unheated storage shed located 500m from the main office through sub-arctic blizzards, reports Process Solutions Manager, Ciaran Mara.

However, the take up take up rate for supplying invoices via email has been significant, peaking at 60% in August 2011.

Orica Australia is still conducting around 60% of its business with suppliers via Electronic Data Interchange (EDI) rather than traditional invoicing. The high success rate of capture and delivery via ReadSoft's solution is compelling and actually convincing some businesses to migrate away from EDI.

This is occurring where data files from external suppliers, carriers, and internal business processes consistently deliver high error rates on upload to SAP. ReadSoft provides faster input to SAP with clarity of errors on invoices and direct action through the ReadSoft solution by those responsible for fixing issues, be it cost, delivery number matching, or stock queries.

"The return for Orica has been significant in terms of human resources. Training and change management has always been a concern for companies introducing new technology. To complement the ReadSoft solution, we have included links on all workflow communications providing new, frequent and infrequent users with full screen video training. This ensures fast adaptation by the business and provides 24/7 training at hand for all employees", added Mara.

"ROI on the ReadSoft Project was met in just 15 months, ahead of our target of 18 months. Two systems (Singapore and North America) followed with installations completed in half the time of Australia. Some of our biggest suppliers are now writing to us with congratulations on payment times, accuracy and speed of resolution to queries."

"Invoice data recovery is reduced to seconds with images displayed on screen and audits and investigation times are greatly reduced. Time is money and AP Automation saves people in our business a lot of time."

Orica is now considering adopting the ReadSoft solution, PROCESS DIRECTOR, to manage other paper-based processes in HR, manufacturing and their corporate library.

With the huge successes achieved in current sites, Orica is looking to deploy the ReadSoft solution in companies in Europe and Latin America, with the asistance of expert staff such as AP Spanish Translator Sandra Villavicencio.

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Email slips as ediscovery target says Symantec survey

What is the first thing that your opposing party will target in an ediscovery request? If you answered email, that is wrong according respondents to a new survey from Symantec who selected files and documents (67 percent), and database or application data (61 percent) ahead of email (58 percent).

Symantec's 2011 Information Retention and eDiscovery Survey contacted 2000 Enterprises from 28 countries with over 1000 employees. It examined how they manage their ever-growing volumes of electronically stored information and prepare for the eventuality of an eDiscovery request.

"The fact that email is no longer the primary source of information for an eDiscovery request is a significant change from what has been the norm over the past several years," said Dean Gonsowski, eDiscovery Counsel at Symantec.

"With the wide variety of sources in play, including loose documents, structured data, SharePoint content and even social media, it is not enough for legal and IT to simply focus upon email alone.

"It's critical for the two departments to work together to develop and implement an effective information retention policy."

More than half indicated SharePoint files (51 percent), and nearly half cited instant messages and text messages (44 percent) and social media (41 percent).

The survey found wide variations in information retention practices among enterprises. Companies that employ best practices, such as automating the placement of legal holds and leveraging an archiving tool instead of relying on backups, fare dramatically better when it comes to responding to an eDiscovery request.

These top- tier companies are 81 percent more likely to have a formal retention plan in place; 63 percent more likely to automate legal holds; and 50 percent more likely to use a formal archiving tool.

Despite the risks, the survey found nearly half of respondents do not have an information retention plan in place. Thirty percent are only discussing how to do so, and 14 percent have no plan to do so. When asked why, respondents indicated lack of need (41 percent); too costly (38 percent); nobody has been chartered with that responsibility (27 percent); don't have time (26 percent); and lack of expertise (21 percent).

The sound of ediscovery

Nexidia has developed a plug-in designed to help users of the kCura Relativity ediscovery platform review and analyse digital audio files more easily as part of litigation discovery and regulatory compliance matters.

With the plug-in, users will be able to automatically create records in Relativity for the audio and video files identified in Nexidia's Forensic Search software. From within Relativity, users are able to organise, code, and play back relevant recordings.

"Increasingly, complex litigation, investigations, and regulatory inquiries involve audio and even video content. Partnering with kCura means Relativity users will have audio and video content integrated in a single, centralised repository," said Jeff Schlueter, VP – Legal Market for Nexidia.

"We're excited to welcome Nexidia to the Relativity Ecosystem," said Andrew Sieja, president and CEO of kCura. "Nexidia's audio and video search analytics will bring a lot of efficiencies to our users, and will allow them to do more with their investment in Relativity."

Allens future with Recommind

Major Australian law firm Allens Arthur Robinson has chosen Recommind's Decisiv Search and Matters & Expertise Tools to overhaul its information management Infrastructure.

Based on Recommind's CORE (Context Optimised Relevancy Engine) platform, the deployment will provide sophisticated information management capabilities for 1800 employees in 14 offices throughout Australia and Asia.

Initially, Decisiv Search will be run over the firm's existing knowledge repository, followed by the addition of the Matters & Expertise module to assist employees to locate colleagues with the most relevant experience and knowledge to answer a specific query.

The implementation of Recommind's QwikFind toolbar will provide easy access to Decisiv Search from the desktop toolbar to Microsoft Office applications.

"During our evaluation, we were extremely impressed with the capabilities of Recommind's solutions," said Rachel O'Connor, director of knowledge services at Allens Arthur Robinson.

"It was clear that Recommind really understood our requirements, and the performance of the technology demonstrated that it was tailored to our needs as a law firm. The collaboration, the wealth of experience and the ease of implementation that were offered were very attractive."

Generation "Gmail" a weak link

A recent international study commissioned by Mimecast found that 79 per cent of people send work emails from their personal email accounts, with 1 in 5 saying they do this on a regular basis, creating email archiving issues for compliance.

The "Generation Gmail" study investigated how attitudes to work email use are evolving and how progressive employers are managing this core communication channel.

It found that while email management is made more difficult when users circumvent email archiving by using third party email providers, balancing the different generations is key. .

The study found that education has a big role to play; and that IT departments are failing to embrace the younger generations of employees for whom social media has affected the way they balance work and life together, and consequently the way they want to use corporate email to do their jobs in a productive and flexible way.

Millenniata M-DISC promises 1000-year archives

US company Millenniata has announced a new optical disc storage format that will not degrade over time and is compatible with standard DVD drives.

The company claims the discs created by its The M-DISC and M-READY drives, which will be on the market in September, will last "literally for a thousand years."

Standard DVD and Blu-ray discs break down after a time because of the organic dyes used in their production, whereas the Millenniata drives permanently etch data onto the write layer of the disc

Hitachi-LG Data Storage has signed up to manufacture the M-READY DVD drives and market and sell them. All M-DISC compatible aftermarket drives will include the M-DISC logo indicating compatibility to write to M-DISCs. Any DVD drive will read the M-DISC.

"Millenniata's technology has been tested and proven to provide long-lasting data storage," said - Sang Hun Kim, Deputy CMO, Sales and Marketing Division at Hitachi-LG Data Storage, Inc. "We are pleased to partner with Millenniata to provide true permanent storage DVD technology that can stand the test of time."

One M-DISC has a DVD disc capacity of 4.7GB of space with comparable performance. Millenniata is currently working on a Blu-Ray version of M-DISC that will be announced at a later date.

A model endeavour

Australian Wool Innovation (AWI) is taming the task of delivering content in multiple digital formats to any destination with a Cumulus digital asset management (DAM) platform.

AWI implemented centralised content management for its wool.com website using OpenText "RedDot" CMS in 2008, after integrating 18 websites into one website, and has since been migrating asset management from shared drives to a Cumulus DAM acquired from Australia's Databasics.

The Cumulus DAM is currently used by around 70 staff on AWI's internal network and another 10 located externally.

The current system includes: Cumulus Workgroup Server; OpenText Bridge and Cumulus Web Publisher Pro

Of particular importance to AWI is the bridge between Cumulus DAM and the Open Text CMS. This connects the user to the DAM library to choose appropriate media for the CMS.

The marketing team at AWI create material for a range of different websites, print campaigns and a new YouTube video channel launched in 2010 at www.youtube.com/WoolmarkOnline.

Web services Manager Elly Chang has championed the usage and expansion of Cumulus in co-ordination with the rest of the AWI marketing team and IT staff.

"We had a massive amount of material sitting on shared drives which we are slowly migrating to Cumulus," said Chang.

"Copyright is a big issue as we need to be able to manage the correct accreditation for images that are displayed on our public-facing websites and publications."

The OpenText CMS serves up content for wool.com and a new consumer-focused site Merino.com, managed by a small marketing team in Sydney.

"We have been able to implement a strict workflow for wool.com to ensure that copyright and credits are correctly managed. All images must be sourced from Cumulus and every page must go through a workflow for approval in OpenText," said Chang.

Adding the metadata to all the historical images as they are ingested from the shared drive into the DAM is a huge job being tackled in stages by dedicated part-time staff.

As well as formatting specifications, the metadata fields include information on the category, source and expiry date for copyright.

The task is not so hard going forward as all of AWI's contracts with photographers and video production companies now specify that the necessary metadata must be supplied with the image or video. This is also the case for material acquired from photo and video libraries, and then the metadata can be automatically ingested.

AWI is also planning to migrate the Web Publisher Pro web interface to the current Cumulus Sites interface later date year.

Attorney-Generals' e-records overhaul

After a year spent deploying a new SharePoint collaborative environment, the Commonwealth Attorney-General's Department (AGD) is asking whether it should look beyond its existing TRIM platform for records management. A major tender has been called to discover potential alternatives.

The tender documents show the A-G's Department is nailing its flag firmly to the SharePoint mast, however an upgrade from its existing TRIM 6 deployment to TRIM 7 has not been ruled out.

According to the tender documents, the AGD "has established a Microsoft SharePoint environment to support a wide range of business applications, including replatforming the corporate intranet and Internet sites and development of selected workflow applications.

"SharePoint has also provided the platform for a learning/demonstration environment, the Virtual Showroom, which has allowed business areas and staff to trial and experiment with team sites, My Sites, a knowledge base wiki, blogs and other SharePoint capabilities."

It says the AGD is moving progressively toward the minimisation and long-term elimination of paper files and documents in favour of fully managed electronic documents. AGD also wants a greater capacity to share information and to support collaboration, both internally and externally, through electronic channels.

"This is consistent with both Government policy (Government 2.0) and AGD strategic directions for information management."

The AGD has selected SharePoint 2010 as the systems platform for these changes.

"It is planned to eventually replace current shared and personal directories with SharePoint libraries and My Sites, and for SharePoint to become the primary user interface for document management functions. At the same time, the transition from paper files to electronic documents will be supported."

The transition to SharePoint implementation is scheduled to take place during 2011-12.

According to the tender documents, "AGD recognises that SharePoint 2010 does not natively support compliance with Commonwealth records management requirements. AGD records are currently managed with TRIM, through a discrete user interface which users must "drive" for records management functions.

"AGD plans to move to a SharePoint/records management environment in which: records management functions are transparently and seamlessly integrated with SharePoint 2010 functions; records management requirements impose a minimal overhead on or are invisible to business users; file plans or other frameworks necessary for records management purposes are configured as part of SharePoint site / application design; and staff are able to meet their records management obligations by simply using SharePoint sites as designed and implemented.

"To achieve this, AGD expects to increase the current level of automation of records management processes "behind the scenes", for example by using rules based processes or configuration to associate record containers with a business classification schema and AFDA and AGD-specific disposal classes; automating metadata capture; and/or setting up inheritance frameworks for default values. "

AGD currently has approximately 1700 staff, situated mainly in Barton, ACT. Additional staff are located in Canberra and sites at Mt Macedon, Victoria and in the Sydney CBD.

In 2003 AGD implemented TRIM as its records management system. The current TRIM version is 6.2.4. It provides both "front end" document management and "back end" records management functionality, including Federal Government - compliant security classification, tracking, retention and disposal for both electronic and paper records.

The TRIM system currently accommodates over 5 million electronic records, primarily in Microsoft Office formats and particularly Word. More than 500,000 electronic records are likely to be registered to TRIM in 2011. The current rate of creation and capture of electronic documents into the system is approximately 1.5 gigabytes per day. There are also more than 230,000 physical (paper) files managed through TRIM and a relatively high rate of physical file creation, particularly for national security rated material. A number of disparate record repositories, such as shared directories and specialised business systems, also exist in the current environment.

"There are user perceptions of difficulties in using the current records management system, in particular searching and retrieving documents with precision results. Current search engines do not search across a number of repositories simultaneously, but need to be accessed and utilised individually to source information.

"There are 32 websites in the AGD environment, mostly external facing. These websites create and capture content which is not currently managed in the records system. Retired websites are archived manually and are not easily 'rehydrated' for FOI or other legislative requirements."

SharePoint push for MFAT NZ

The New Zealand Ministry of Foreign Affairs and Trade (MFAT) is leaping into electronic records management, seeking a new platform to integrate with its SharePoint 2010 document management system.

A tender has been issued for an electronic records management solution to integrate into its Microsoft Windows and Office environment. The system will have to cater 1500 staff in New Zealand and overseas, including a far flung network of 53 overseas posts that employ around 620 local staff.

The electronic records solution must mesh with the Ministry's knowledge management priorities to enhance collaboration and cooperation, and make it easier to share and access tacit and explicit knowledge and information.

The IT environment is strictly Microsoft, with Windows Server and SQL Server as well as Windows XP, Office 2003 and SharePoint 2010 on the desktop. There are currently projects underway to upgrade to Windows 7 and Office 2010 and an interim document management solution on a SharePoint 2010 platform.

The Ministry currently uses Hummingbird's Document Management System and DOCS Open to provide document management facilities. As part of its records management solution, the Ministry will be looking to manage the digitisation of records and scanning incoming hardcopy information.

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FineReader 11 speeds OCR

ABBYY has announced FineReader 11, an intelligent OCR (Optical Character Recognition) software application featuring a new black-and-white mode claimed to increase document processing speed.

A dedicated new Black & White Processing Mode is able to be used using on common documents such as contracts, newspapers, books, or any other documents where colour is not needed. It is claimed to deliver highly accurate OCR results with up to 45 percent faster processing. An Enhanced Fast Processing Mode, that provides up to 70 percent faster recognition as compared to the default processing mode, is suited for projects where speed is critical, such as creating searchable PDF archives.

FineReader 11 allows users to convert paper documents and images of text to a variety of formats supported by e-book readers, tablet PCs and smartphones, including the newly added Electronic Publication (.ePub) and FictionBook (.fb2) formats. Additionally, texts converted with ABBYY FineReader 11 can be sent directly to an Amazon Kindle account.

In addition to Microsoft Word documents, ABBYY FineReader 11 now accurately re-creates headers, footers, page numbering and table of contents across all pages in resulting OpenOffice.org Writer (ODT) files. When saving to PDF, the application intelligently identifies and reproduces the document's content outline bookmarks with live links for better navigating and reading.

ABBYY FineReader 11 Corporate Edition, designed for medium-sized businesses, departments and workgroups in large enterprises, provides additional collaboration and productivity tools. Corporate Edition supports centralised installation from a server onto multiple workstations, distributed document processing with the capability to share workflows across the network, and offers a flexible licensing scheme designed specifically for corporate customers.

Archiving audio for easy search

NOA Audio Solution has announced the release of mediARC 1.6, an upgrade to its workflow, media, and metadata system for audio archiving. The upgrade enables faster indexing, faster searches when using imprecise input, and single sign-on and low-level access from non-NOA systems.

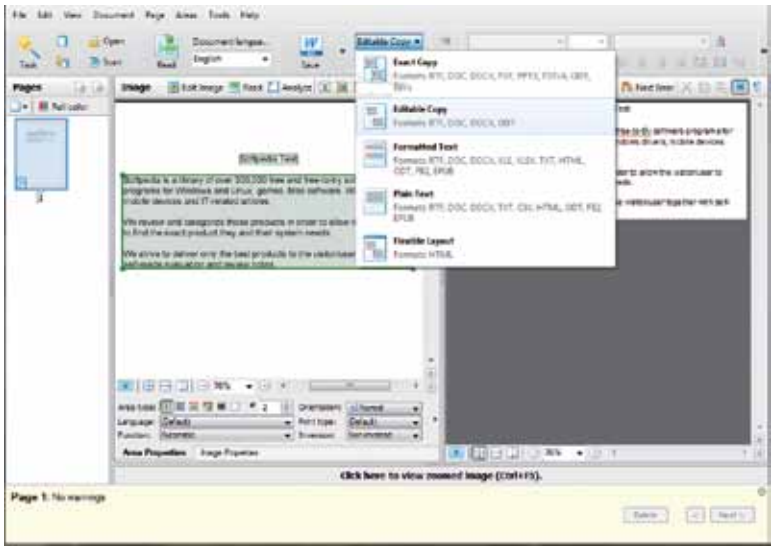
mediARC 1.6 contains several improvements, including phonetic search, which identifies and corrects incorrect spelling to match search terms with metadata more quickly and accurately; alternative spelling suggestions for search terms through different levels of fuzzy search; a new version of the RemoteFileAgent, which replicates multiple active directories to enable single sign-on to mediARC from outside systems; the new mediARC API, which allows non-NOA systems to access mediARC data without the need for a customised, low-level access model; and an overhaul of the MatLink engine for faster indexing.

"This version of mediARC makes searching and indexing faster and more efficient," said Jean-Christophe Kummer, NOA Managing partner. "It also offers other time-saving improvements - such as the ability to consolidate user log-in combinations from multiple replicated systems into a single set of credentials for each user - that can cut down on administrative costs and save facilities money."

Axway launches MailGate 5.0

Axway has launched its MailGate 5.0 solution which combines email network protection, policy-based content filtering and automated encryption with disaster recovery and high availability capabilities. The product is designed to protect the entire email network and reduce infrastructure costs and the liabilities associated with unsecured and unmanaged email communications.

Now including secure messaging functionality on a Linux appliance, the latest release of Axway MailGate includes features such as gateway-to-gateway encryption, regulatory compliance lexicons, enhanced digital rights management, archiving



capabilities and support for Internet Protocol Version 6 (IPv6).

"A corporate email security strategy is only as strong as its weakest link. With the near daily headlines around both accidental data loss and natural disasters, IT departments now are responsible to manage more sophisticated email protection and recovery strategies," said Joe Fisher, executive vice president of product strategy and solutions, Axway.

Widgets to ease process design

Bamboo Solutions has updated its business process automation tool for SharePoint, Workflow Conductor, with options designed to allow businesses to control the scope of workflows.

Workflow Conductor now includes more than 50 different "widgets" which act as modular building blocks, allowing users to automate almost any task. New widgets include expanded SharePoint and Active Directory group/user management capabilities, new site creation and management functions, more list and item controls, and even a widget that allows custom code to be executed. As with previous versions, Workflow Conductor continues to allow workflow actions to run on other sites and site collections, and to allow individual actions to run under separate credentials. Features like these ensure that businesses can easily automate their existing processes, rather than change their processes to fit the confines of a software solution.

BitDefender protects Twitter

A beta version of a free tool to scan social network users' accounts and detect spam, scams and other e-threats, has been launched by BitDefender, Safego for Twitter. Initially launched for Facebook users, Bitdefender Safego checks unknown Twitter profiles before you follow them, checks the accounts you are currently following and scans messages sent to you for spam, suspicious links or hijacking attempts.

Safego for Twitter also features a scan on-demand function for checking whether the account you wish to follow is safe, before you actually follow them. Potential threats lurking behind shortened URL links are also automatically scanned, and the use profile categorised according to the threat level.

Updating open source DAM

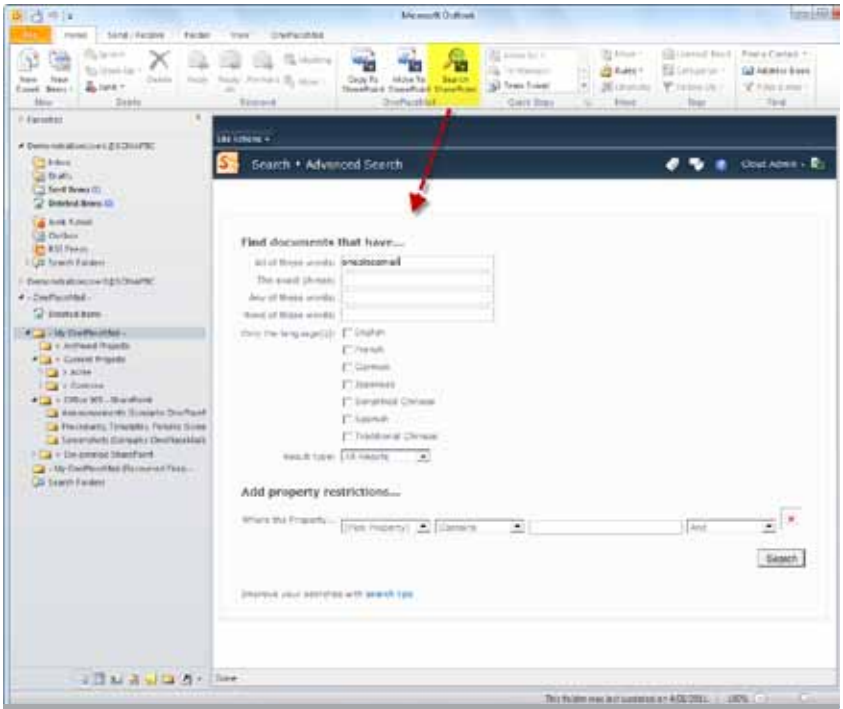
Daydream has announced an upgrade to its FocusOPEN Digital Asset Manager software, adding customisable metadata, new preview plug-in architecture and a dedicated JavaScript scripting engine. Users can assemble custom preview plug-ins for FocusOPEN in client-side technologies like Flash and JQuery as well as implement custom server-side functionality using the scripting engine. Developers can now leverage FocusOPEN's robust and powerful .NET application infrastructure, without having to modify the core code."

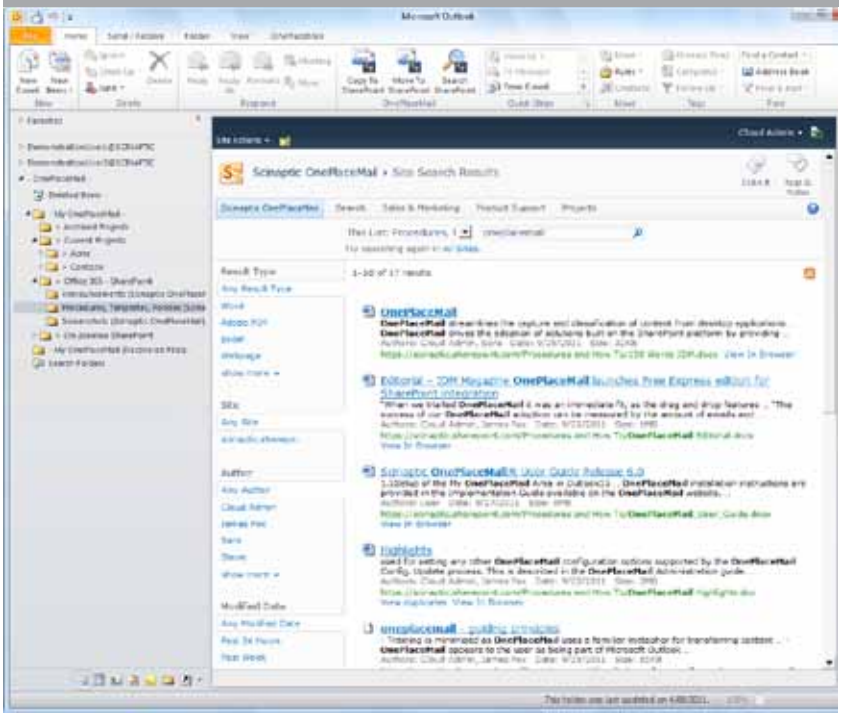
OnePlaceMail 6 embraces the cloud

Australian company Scinaptic is tackling the complex issue of hybrid cloud environments in the collaborative workplace, with the latest release of its flagship product, OnePlaceMail Release 6.

OnePlaceMail Release 6 is an Outlook/Office/File Explorer integration solution for SharePoint, Office 365 and other on-premise cloud environments. The solution lets users enjoy the complete SharePoint or Office 365 experience from within the Outlook interface, including the ability to access the full SharePoint search capabilities.

With the launch of Release 6, Scinaptic is also making available a free version of the software for the first time, OnePlaceMail Express Edition. OnePlaceMail R6 provides a natural extension to existing applications for accessing and saving content with metadata to SharePoint and Office 365 from within Outlook, Windows File Explorer and Microsoft Office. In addition to support for traditional on-premise SharePoint 2007 and 2010 environments, OnePlaceMail R6 adds new support for Office 365 and hybrid On-Premise/Cloud environments. Access to SharePoint 'Recent Locations' has been added to help streamline saving content, plus the ability to search SharePoint/Office 365 without leaving Outlook.





OnePlaceMail6 screnshots showing the abiity to search SharePoint from within Outlook (above) and display the results within Outlook (below).

OnePlaceMail R6 is now available as an easy, client-only installation (no server required) with a product tour wizard and refreshed user interface.

Golder Associates, a global company providing consulting, design, and construction services across 160 offices worldwide and approximately 7,800 employees, has turned to OnePlaceMail Enterprise Edition to encourage adoption of its SharePoint project workspace.

"When we trialled OnePlaceMail it was an immediate fit, as the drag and drop features embedded directly into Outlook and provides staff with an efficient and easy to use tool for the management and migration of project information into the specified SharePoint libraries," said program manager, Greg Stimson. "The success of our OnePlaceMail adoption can be measured by the amount of emails and attachments brought into the project workspace – and this is growing daily."

The ability to save critical email into the project workspace was identified as an essential element in terms of information management and collaboration; however, it was the need to make it easy for the user to save emails and automatically capture email related metadata direct from Outlook that led to OnePlaceMail.

Utilising their intranet, with SharePoint as the principal platform, Project Managers create 'project workspaces' for all project related documentation - enabling better collaboration and knowledge sharing across many projects worldwide.

"With two major releases in 18 months it is evident that Scinaptic have a highly concentrated development schedule for OnePlaceMail which delivers even more benefits to users."

OnePlaceMail Release 6 is provided in two editions, the new free Express Edition and the Enterprise Edition, where a 30 day trial is available. *www.scinaptic.com*

Kodak adds high volume scanner

Kodak has announced the Model i5800 Scanner, a production scanner for service bureaus and medium to large businesses with high-volume document workflows including digital mail rooms, census projects, insurance claims and invoice processing.

KODAK Dynamic Flow Technology, a primary component of the i5800 Scanner, helps businesses eliminate the need for additional image processing with built-in features that boost image accuracy and reduce overall total processing time to drive down operating costs. At up to 210 pages per minute (ppm), KODAK Dynamic Flow Technology activates a digital architecture, logic and programmability, all of which work to optimise memory allocation, streamline processing paths and customise capabilities.

Kodak's Perfect Page Image Processing technology automatically enhances image quality, corrects streaks and adjusts colour, brightness, contrast, background preference and orientation. This built-in feature helps more accurately convert paper-based documents into process-ready information. A height-adjustable transport provides users with a more ergonomic setup at the ideal scanning position. Programmable function keys deliver a simplified user experience.

The i5800 Scanner includes an automatic 750-sheet elevator design with four settings: continuous feed, 100-sheet, 250-sheet, 500-sheet and full 750-sheet batches. With the standard feeder, the i5800 Scanner is capable of handling various paper types. An optional ultra-lightweight feeder accessory enables users to handle more delicate types. Contact Kodak Australasia (03) 84178132

Locking out rootkit threats

McAfee has unveiled a new hardware-assisted approach to computer security developed in collaboration with Intel it has dubbed DeepSAFE. The system has been developed in response to the growth in advanced persistent threats and stealth attacks and the fact that hackers can evade current operating systems-based security, demanding a new paradigm – security beyond the operating system.

Todd Gebhart, co-president of McAfee, said, "McAfee DeepSAFE uses hardware features already in the Intel processors to provide security beyond the OS. From this unique vantage point, DeepSAFE can apply new techniques to deliver a whole new generation of protection in real time to prevent malicious activity and not just detect infections."

The technology sits below the OS to detect stealth techniques such as rootkits that embed themselves deep in the OS to evade current security solutions. According to McAfee Labs, more than 1,200 new rootkits per day are detected - equating to 50 per hour every single day. A system running the DeepSAFE technology was able to detect and stop a zero day Agony rootkit from infecting a system in real time.

This technology, which combines the features of existing Intel hardware and innovations in security software, is expected to launch in products later in 2011.

Strengthening semantic analysis

Broader support for office document formats is included in a new update to the Semantex semantic analysis platform, used for market research, e-discovery and compliance monitoring. There are also new output formats, optimised pre-configured levels of processing, and highly scalable service oriented architecture support.

"Robust performance, multilingual handling, superior integration options and ease of customisation are all key requirements for text analytics to be used effectively today in a wide range of applications. Semantex 5.0 meets all of these requirements and exceeds them," stated Janya founder and CEO Dr. Rohini Srihari.

"In addition, Semantex 5.0 has made great strides to interact with and utilise the Semantic Web and Linked Open Data. Our RDF and OWL support provide well established integration points

in order to maximise Janya's entity and relationship extraction capabilities." Srihari added.

Clouding the capture picture

Easier development of cloud-based applications that incorporate document capture is promised with the latest release of Atalasoft DotImage 10 software development toolkit (SDK) for Microsoft .NET developers. DotImage 10 is a toolkit for applications built using the .NET Framework for Microsoft Windows Forms, WPF, ASP.NET and Silverlight. DotImage 10 incorporates controls to add zero footprint web document viewing and annotation support, enabling users to author layered annotations, and view and manipulate TIFF and PDF documents in web browsers without the need to download additional add-ons or plug ins.

"Building web based applications that leverage advanced document imaging can be time consuming and difficult," said William Bither, Founder and General Manager at Atalasoft, a Kofax company. "DotImage's new capabilities allow developers to build custom cloud based applications that can scan, view and process documents and images with significantly less effort and cost."

DotImage 10's new capabilities include:

- New HTML document viewer: Developers can create a full page, zero footprint document viewer with smooth, continuous scrolling for viewing documents in browsers on PCs and mobile devices, such as an iPad, without installing any client software. As such, minimal programming is needed to embed the viewer into any ASP.NET or ASP.NET MVC website, or deploy to Microsoft SharePoint;
- Silverlight imaging SDK: A large subset of DotImage has been ported to run inside the Silverlight client and other managed environments, such as Windows Phone 7, Office 365 and Partial Trust environments.

Getting the lead out

Software developers in document, medical and multimedia imaging are the target market for a new release of LEADTOOLS V17.5.

Otis Goodwin, Manager of Developer Support, said, "We realise the growth cloud and grid computing has made over the last few years, and wanted to include a complete framework customers could use to move their applications to the cloud. We have also added many features which allow us to natively interact with several document formats, specifically PDF, making V17.5 one of our biggest releases for the document imaging industry.

"The LEADTOOLS Document Imaging Engine incorporates a new Advanced PDF Reader, redesigned Barcode interface, faster and more accurate OCR Advantage Engine, network support for the Virtual Printer, and improvements to document formats including Office 2007 and JBIG2. PDF reading and viewing now offers support for extraction of text, hyperlinks, bookmarks and metadata. The LEADTOOLS Document Readers allow reading images, thumbnails, text and metadata from any supported document format using a uniform set of methods and properties, regardless of the document type.

The high level LEADTOOLS Document Readers interface can be used to easily create feature-rich document viewing applications with unlimited zoom, smooth scrolling, thumbnails, metadata and text search without the need to know any specifics about the format you are using. Barcode functionality has been expanded with a new set of libraries for Silverlight and Windows Phone.

The Raster Engine now supports JPEG-LS, JPEG-XR, Digital Camera Formats (Sony, Canon, Nikon, etc.), PCL6 and more. The Vector engine also received several enhancements to the DXF and DWF formats, staying up to date with the latest objects and drawing types.

Pain-free metadata removal

Litera has released Metadact-e, server-based software that protects corporate confidentiality and proprietary information by removing potentially sensitive metadata from all e-mail messages and attachments including those sent via mobile devices such as webmail and smartphones.

"With an increasingly mobile workforce the risk of unintentionally disclosing sensitive information also increases. Metadact-e allows organisations to provide a systematic and enterprise-wide approach to the cleaning of document metadata thus decreasing the risk," said Deepak Massand, Litera's CEO.

Litera Corp also markets Metadact, a desktop- based metadata cleansing solution.

Metadact-e removes metadata from e-mail messages and their attachments (including Microsoft Office, PDF, image and ZIP files) sent via Outlook, Lotus Notes, and other e-mail programs. It allows corporate administrators to define a centralised cleaning policy that can be implemented on a company-wide level or individual users can be permitted to personally control some of their settings and determine what types of metadata are cleansed.

The enhanced flexibility and functionality of Metadact-e enables users to selectively remove, for example, tracked changes in Word documents, hidden cells in spreadsheets and/or speaker's notes from PowerPoint presentations. Metadact-e also provides detailed logs enabling administrators to review a comprehensive list of detected and removed metadata by sender, date, and additional variables.

Livescribe takes on Google Sites

The Livescribe Smartpen can now send handwritten notes and recorded audio to Microsoft OneNote, and Google Sites. First introduced this May, the Livescribe Connect service already connects to Google Docs, Facebook, Evernote, Email and the iPad and iPhone. Livescribe Connect for the Echo and Pulse smartpens can also deliver interactive "pencasts" from paper.

"Written and spoken information are two powerful communication tools; however, most of this information is largely inaccessible in a digital format. Livescribe fills this void by enhancing the capture, access and sharing of written and spoken information both on paper and electronically," said Byron Connell, Livescribe co- founder and chief marketing officer.

"Adding support for Google Sites and OneNote to the Livescribe Connect suite provides our customers with two more valuable ways to organise, access and share important information from meetings and lectures." In addition to the new connectors, the update to the Livescribe Connect software (version 1.1) includes two other enhancements. The Facebook connector now allows users to post pencasts on friends' walls in addition to their own, as well as Livescribe's fan page. And, for Mac customers, Livescribe Connect now supports the recently released Mac OS X Lion.

Teaming up for SharePoint media

Two heads are better than one when it comes to the challenge of managing rich content on SharePoint, so Metalogix Software and Equilibrium have combined forces to address the task. The two companies will offer a combined solution based on Metalogix StoragePoint and Equilibrium MediaRich ECM for SharePoint, to provide an enhanced visual experience when searching and inspecting SharePoint document libraries – even when content has been offloaded from the SharePoint database to improve system performance.

"Equilibrium's MediaRich solution transforms any SharePoint Document Library Web Part into a visually appealing interface while simultaneously enabling deep inspection of all files and search results," said Sean Barger, CEO, Equilibrium.

"This helps to accelerate productivity and collaboration while also enabling anyone to find and preview the right file for the job. When combined with StoragePoint, users can more easily store and find all content in SharePoint without burdening their SQL database with large files that can impede overall performance."

"The partnership between Equilibrium and Metalogix helps resolve the fundamental problem of storing digital assets in SharePoint," said Trevor Hellebuyck, vice president of enterprise technology, Metalogix.

"When used together, MediaRich and StoragePoint enable SharePoint users and administrators to not only instantly visually search and view all digital content, but to also have the unstructured content BLOBs offloaded so that SharePoint databases can perform at optimum levels."

"Equilibrium MediaRich is distributed in Australia/New Zealand by Databasics

Migrating to SharePoint

Metalogix Software has announced the availability of Migration Manager for SharePoint – Documentum Edition, for large or small scale migration of all EMC Documentum content (including cabinets, folders, calendars and documents).

Steven Murphy, CEO, Metalogix, said, "The new Migration Manager for SharePoint – Documentum Edition gives organisations a rapid and non-disruptive solution for migrating this vital content, while retaining critical permissions, user data and metadata for compliance and corporate governance."

Documentum objects can be migrated at the item, folder or site level using a lightweight client application that connects to Documentum and SharePoint remotely through supported APIs. Metadata, user data and permissions can all be preserved and migrations are supported for SharePoint on-premises or SharePoint Online in the cloud.

Migration Manager for SharePoint – Documentum Edition supports any flavour of SharePoint 2007 or 2010 as a Documentum migration target. The new product also supports migrations to SharePoint environments on-premises or in the cloud.

Book scanning solution

Plustek Technology has announced the OpticBook 3800, a cost effective solution for scanning books, magazines and bound materials. This scanner is ideal for comic book collectors, rare book collectors and sellers, eBay book sellers, education personnel, and students.

Using Plustek's patent-pending Shadow Elimination Element (SEE) Technology, the OpticBook 3800 can scan any book without the book spine shadow and distorted text associated with book scanning on flatbed scanners. The OpticBook 3800 includes everything needed to create searchable PDFs from books, magazines and bound materials.

It offers SEE Technology for distortion free book page images at up to 1200 dpi resolution. There are four single touch buttons to simplify scanning tasks and it takes seven seconds for an A4-size colour, grayscale, black and white scan at 300 dpi.

MetaVis launches File Manager

MetaVis Technologies has announced a bi-directional migration tool that allows users to move content, folder structures, and metadata between file systems and any SharePoint environment, including Office 365. SharePoint users can download a free trial of File Manager at http://www.metavistech.com/try.

With MetaVis File Manager for SharePoint, users can easily control how file share content is moved into SharePoint or how content is downloaded / off boarded from SharePoint to a file share – no matter how complex the environment.

As a result, File Manager makes it easy to archive SharePoint content and metadata for use in other systems.

File Manager is an agentless solution and maintains all your valuable metadata without the need to install any server-side components. File Manager provides full support for Managed Metadata. It allows content to be tagged with managed metadata values during loading or downloading for vastly improved end-user search and usability.

MetaVis File Manager can be used to: move content from SharePoint to file systems, reduce the size of your SharePoint environment; archive older content or completed project documentation, and migrate content from file systems.

Mindjet MindManager 2012

New capabilities for real-time co-editing, enhanced information maps and new desktop interface have been added to Mindjet MindManager 2012 Professional for Window, plus new brainstorming features.

"MindManager 2012 has been designed to meet the needs of today's professional who are constantly barraged with new opportunities and pressing business challenges," said Blaine Mathieu, chief products officer, Mindjet.

"The new Directed Brainstorming feature organises an outpouring of ideas that can be quickly honed into real solutions for real business needs. In addition, MindManager 2012 integrates with Mindjet Connect, Mindjet's cloud-based service to provide open and full sharing of MindManager maps with anyone, anywhere, on any device."

MindManager 2012 is available for the upgrade price of $US179 and $US399 for new users.

Nuance PaperPort Pro 14

Nuance has launched PaperPort Professional 14, promising easier and faster scanning for Windows, with expanded support for PDF and Nuance's cloud document services.

Scanning is made faster and easier through new Scan-and-Open additions to One-Click scanning, supporting nearly any TWAIN, WIA and ISIS scanning device. Resulting scanned pages are higher quality due to enhancements in image processing, and OCR (optical character recognition) accuracy has been increased by up to 34%.

Nuance has also included PDF-MRC compression with the product, which creates industry-standard PDF files that are eight times smaller than regular image PDF files without compression. The product's ability to organise paper and digital documents is enhanced through new folder views, support for Windows right-click actions and support for Windows 7 jump-lists.

The ability to connect with over 20 cloud services is now included, including Google Docs and Evernote, as well as integration with the new Nuance PaperPort Anywhere cloud and mobile service. PaperPort Anywhere lets users automatically store their desktop documents in the cloud, and access those documents via PaperPort 14 on Windows, through web browsers, and using free apps for the Apple iPad, iPhone and Google Android devices.

PaperPort Scan Enhancement Tools have been expanded to automatically remove black borders and three-hole punch artefacts, and implements new auto-crop and auto de-speckling capabilities. The product also increases OCR accuracy by up to 34%.

Organising, finding and using documents is enhanced with new "Recently Viewed" and "Recently Scanned" navigation. PaperPort also now supports Windows right-click menus.

Users can now select files in PaperPort and use the same right-click shortcuts that are available in Windows Explorer. The product also takes advantage of Windows 7 features, including jump-lists, which provide a fast path to recent tasks. In PaperPort 14 the PDF document thumbnails offer more information about PDF documents.

A large information icon now appears in the upper left-hand corner of PDF document thumbnails, indicating the file contains keywords and descriptive text. Hover over the icon, and it displays the information without needing to open the file. It easily maps to network drives, and the new release locks files in use over the network, enhancing security and collaboration.

Percussion bangs Web CMS drum

Percussion Software has launched a new Web Content Management (WCM) solution, Percussion CM1 Version 2, promising new social engagement capabilities, including advanced blogging functionality, improved content reuse, sharing and commenting capabilities, new cloud deployment options, and new ways to deploy sites faster.

The company says traditional WCM "products" are in fact technology platforms on which the customer or a third-party services firm must build their own custom WCM application. It claims Percussion CM1 Version 2 "productises" the actual WCM application itself, enabling rapid deployment of sites and web channels through pre-built Widgets and Gadgets.

This enables organisations to eliminate the reliance on costly

third-party consulting services firms to build these core features during the initial roll out, and for the ongoing deployment of new features and upgrades. Its significant advances in user-interface design makes it possible for users to take control of their WCM initiatives while maintaining the flexibility to address "What's Next" on the web. A drag-and-drop interface can be used to make any kind of edit or change—such as creating new templates, modifying page layouts, integrating social content, or embedding third-party web applications.

Percussion CM1 Version 2 provides advanced blogging functionality from within the WCM to enable wider re-use of site content and rich cross linking with the blog, as well as more complete analytics from the CM1 Dashboard. Pricing starts at $US20,000 for product license and a $US5,000 annual subscription covering upgrades and maintenance.

Processing SharePoint

Bamboo Solutions has announced Workflow Conductor v2.0 for SharePoint 2010, developing on its solution for business process automation. The company claims its new workflow deployment options allow businesses to control the scope of workflows, while simple workflow versioning makes process maintenance painless.

Workflow Conductor now includes more than 50 different "widgets" which act as modular building blocks, allowing users to automate tasks. New widgets include expanded SharePoint and Active Directory group/user management capabilities, new site creation and management functions, more list and item controls, and a widget that allows custom code to be executed.

This adds extensibility to Workflow Conductor.

"Beyond the new features and product improvements, the strategic significance of this release is Bamboo's long term commitment to investing in business process automation," said Jeff Tubb, Senior Product Manager at Bamboo Solutions.

"The ability to use workflow as a means to enhance, extend and customise Bamboo's existing portfolio of SharePoint solutions is going to be a point of focus going forward."

Version 2.0 of Workflow Conductor for SharePoint 2010 is available as a free trial download.

Linking SharePoint & Office 365

SharePoint Document Capture specialist PSIGEN Software has launched new Data to Document Linking (DDL) Technology for integrating SharePoint Lists and Document Libraries.

The technology automatically creates a relationship between a single document copy, and sets of data within SharePoint Lists. This new feature provides a multi-step integration between how documents are captured, classified and data is extracted or entered.

For multiple record documents, like invoices with line items or a check that pays multiple vendors, sets of data are assigned to documents in PSI:Capture. When the Capture Workflow is complete, a single copy of the document and a subset of data are sent to a SharePoint Document Library for archive and retrieval.

All document data is routed to a SharePoint list and auto-linked to the corresponding document within the Document Library.

"Many of our Microsoft SharePoint and Office 365 partners are building custom document capture solutions cantered on the data contained within their scanned or imported documents," said Bruce Hensley, President of PSIGEN.

"DDL allows SharePoint to be both a data and document repository for solutions like Invoice Processing, Contract Workflow and Claims Processing."

DDL has many benefits, including:1. Reducing required storage by allowing a single copy of a document to be referenced by multiple sets of data. The technology "data enables" your documents, and the corresponding data can be utilized for reference by other Microsoft Technologies (Dynamics), for reporting purposes, or for Business Intelligence purposes.

It opens up new data gathering offerings for partners where scanned documents can be collected, information harvested, and then placed within SharePoint. It fully integrates with all of PSI:Capture's Managed Metadata and Term Store capabilities, allowing for auto-creation of Taxonomy structure based on document characteristics.

RecMan locks onto Gmail

A tool for deploying records management policies for Gmail has been launched by RecMan, developer of RecMan for Google Apps, an enterprise-level platform for the management of document compliance processes for Google and the cloud. RecMan for Gmail provides administrators in organisations of any size with full control over development and deployment of records management processes for e-mail messages and documents within the Gmail domain.

RecMan for Gmail is designed to meet the needs records managers and compliance officers have for developing and deploying records management policies, including tiered file plans, retention schedules, disposition policies and legal holds; all using a simple browser interface with centralised controls and access management. Designed to meet six critical compliance needs espoused by ARMA International, the Association of Records Managers and Administrators, RecMan applications now include metadata generation and management. The metadata feature allows the addition, editing and indexing of detailed metadata for all documents and e-mails, enabling the search of legacy documents.

RecMan's patent-pending technology is designed to support three main standards for records management, including ISO 15489, DoD 5015.2, MoReq2.

Recovering a rooted Android

AccessData has announced the release of Mobile Phone Examiner Plus (MPE+) 4.4, a stand-alone cell phone forensics software solution that integrates with its Forensic Toolkit (FTK). MPE+ is claimed to be one of the first mobile forensics solutions to enable full user data extraction from rooted Android devices to include SQLite databases, deleted application cache, user name and passwords, Internet histories, location information and deleted data.

It can now extract and decrypt the logical OS partition and logical user partition from iOS and iOS4 devices, including iPhone 4, iPad 1, and iPod Touch 3 and 4 devices.

Red Earth signs on for Google Apps

Central email signature management for companies using Google Apps is now provided as part of Red Earth Software's Policy Patrol product. This is claimed to be the first Google Apps email signature program to offer integration with Microsoft Windows Active Directory, therefore allowing companies to configure one template that is automatically customised with the sender's information from the Active Directory.

"More companies are moving to hosted email platforms such as Google Apps to save money and simplify maintenance. While hosted email platforms have advantages, companies are also giving up some control when moving away from on-premise solutions," said Deborah Galea, co-founder and COO of Red Earth Software.

"Policy Patrol Signatures aims to give back some of that control by allowing companies to manage their corporate email signatures centrally, ensuring that emails include a consistent, company branded signature along with the necessary legal disclaimers.

"In addition to offering Outlook email signature management, Policy Patrol Signatures now also offers central email signature management for Google Apps. It directly integrates with Google Apps, with no client installation or browser plug-in needed. An Outlook plug-in is available if Outlook is used as the email client.

Due to Policy Patrol's integration with Active Directory, email signatures can be automatically customised with the sender's information, always taking the latest information from the Active Directory.

Unchaining staff from travel receipts

OpenText has introduced a new product that works with the SAP Travel Management application to eliminate the need to move paper receipts around in order to process expense reports. It aims to help companies significantly lower the cost and time involved with processing reimbursements, while also reducing the burden on travelling employees. The new solution will be resold by SAP as the SAP Travel Receipts Management application by OpenText.

"SAP Travel Receipts Management is a great example of how ECM technology fully optimises SAP solutions by integrating content in this case travel receipts into SAP business processes," said Patrick Barnert, Vice President, SAP Solutions at Open Text.

"We continued to see strong demand among customers for better ways to manage all forms of business content within the context of their SAP solution-based environments using OpenText solutions."

SAP Travel Receipts Management by OpenText gives users of SAP Travel Management a full set of tools to eliminate the hassle associated with processing paper receipts.

It integrates with multi- function devices, scanning applications, fax machines and email to make it easy to capture images of receipts. With mobile device support, travelling employees can simply use digital cameras or phones to capture receipt images.

The digitised receipts are then stored in a repository and linked to appropriate trip information and accessible through standard SAP user interfaces.

The payoff from fully automating travel receipts processing can be substantial. In a recent survey report entitled "Travel & Expense Management Benchmarking," PayStream Advisors writes that, "On average, a company spent approximately US$22.15 to process an expense report, if the process was entirely manual. This was twice as much as the processing costs

accrued by companies that are fully automated.

"Organisations that have some automation in place have been successful in driving down processing costs per transaction to US $18.67, whereas companies that are fully automated and using an integrated system have a per transaction cost as low as US $10.68.

"Beyond lowering costs, fully automated solutions such as SAP Travel Receipts Management lighten the burden on travelling employees since they can simply use email and self-service applications to submit receipts rather than having to prepare and mail paper receipts. In turn, because paper documentation no longer needs to be routed around, approval and processing cycles are shorter leading to quicker reimbursements."

Should questions arise, managers have immediate access to a comprehensive audit of receipt source documents.

WatchDox extends SharePoint sharing beyond the firewall

WatchDox, a provider of document control, tracking and protection solutions, has announced integration with SharePoint 2010.

The WatchDox SharePoint Connector enhances SharePoint to allow access to documents from outside the firewall and on any mobile device, while ensuring these documents are secured end-to-end. SharePoint 2010 has rapidly grown in popularity with enterprises, however, SharePoint administrators and users often find it challenging to facilitate access to documents beyond the company's firewall and via mobile devices.

Moreover, once a document has been shared, there is no way to control its distribution and prevent its recipients from copying or forwarding it to unauthorised users which could potentially result in serious data leaks.

The WatchDox SharePoint Connector complements SharePoint's document management strengths with secure document exchange functionality, allowing SharePoint administrators to:

- Enable users to send documents securely from the SharePoint interface to anyone inside and outside the organization, or to share entire SharePoint libraries through the WatchDox virtual data room service.
- Apply persistent protection to documents, restricting downloading, copying, printing and forwarding and provide granular tracking and auditing.
- Destroy shared documents at any time – even after they have been downloaded onto any PC or mobile device.

Provide easy and reliable access to documents on any mobile device with strong security, and the ability to destroy documents if the device is lost or stolen.

Semantics boost for Afresco

Alfresco ECM has acquired semantic search capability via the addition of metadata detection and extraction technology from TEMIS.

Luxid is the name of a new solution that automatically extracts meaningful information (topics, entities, facts, sentiments, categories) from documents.

When deployed on Alfresco Enterprise, Luxid can be used, to enrich search facets, recommend related content, link to enterprise knowledge bases, feed Business Intelligence dashboards or trigger business workflows.

"Alfresco sees tremendous value in enabling customers to explore valuable content with Luxid. In teaming with TEMIS, we are demonstrating the value of an open source solution for ease of integration", said John Powell, President and CEO of Alfresco.

The Luxid-Alfresco integration aims to alleviate the need for time- consuming, manual metadata contribution. SharePoint add-on changes user passwords

Trapeze swings in for TechOne

Redman Solutions has announced the release of Trapeze Capture for TechnologyOne's Enterprise Content Management (ECM) solution. Onstream Systems and Redman Solutions have developed the product together as a scanning solution that integrates with TechnologyOne ECM - formerly DataWorks.

TechnologyOne ECM is used by more than 100 customers with requirements for batch scanning, including local councils, state government departments and other organisations across Australia. Organisations with high-volume batch scanning requirements have for a long time struggled with the technical implications of storing documents as separate single TIFF page files.

Redman Solutions has solved this problem by fixing it at the source, for example at the time the documents are scanned, rather than trying to manage the scanned output. Geoff Redman, of Redman Solutions, said the challenges had been around for a long time.

"By listening to the market and using our relationships within key councils, we have delivered a solution that should answer the cries of records-keepers across the country," Mr Redman said.

"By understanding their business process, we have found a simple yet smart solution."

Neezam Eid, of Mosman City Council, has trialled the product and plans to implement it Council-wide.

"We have been waiting for a product like Trapeze Capture for a long time," Ms Eid said. "It has significantly reduced scanning and registering time for our Records team."

Integration of the Trapeze Capture solution and TechnologyOne ECM enables the use of standard ISIS or TWAIN driver scanners and removes the requirement for more expensive scanners with specific hardware. Sites are now able to take better advantage of the features of new scanners, such as auto-page size and orientation detection.

These features will improve the speed of the scanning process, coupled with the Trapeze Capture ability to automatically extract data from the documents for profiling.

StorageCraft unveils ShadowControl ImageManager 5

StorageCraft has enhanced its ShadowProtect backup and disaster recovery software with enhanced software designed to help manage, customise and enhance the backup process, ShadowControl ImageManager 5. It includes tools and services that allow users to replicate backup images to the cloud, pre-stage backups as virtual machines, consolidate backup image files, and monitor and manage backups created with ShadowProtect.

"Small to midsize businesses (SMBs) don't often have the resources to manage costly systems that would provide redundancy in their computer environments. ShadowControl ImageManager gives them flexible, reliable tools to make that possible," said Brandon Nordquist, vice president of product management at StorageCraft.

ShadowControl ImageManager increases control over backup images created with ShadowProtect, which allows the user to more efficiently manage physical, virtual or cloud backups.

New features include:

- ShadowStream accelerates the file transfer of backup images up to five times faster than traditional file transfer does. Its technology transports ShadowProtect backup files off-site quickly and reliably by controlling bandwidth capacity.
- IntelligentFTP enables the user to filter files for replication locally, to the network, or to an off-site location. The user can set parameters for the replication, whether it's every incremental backup or just backup files that have been verified.
- HeadStart Restore reduces the recovery window by proactively constructing the backup image as a virtual machine, allowing the user to restore the system in minutes, saving critical time.

In addition, it provides management tools that allow users to verify and re-verify backup image files over time to make sure they are still intact. S

ShadowControl ImageManager 5 also consolidates backup image files and allows the user to set up retention parameters locally and in the cloud, saving valuable storage space both on-site and off- site. Users can set up email notifications to track the status of backup images as well.

It is included free with a ShadowProtect license. Jobs using ShadowStream, intelligentFTP and HeadStart Restore require additional licensing fees, depending on the software the user selects.

Workshare 7 tames metadata

Workshare has released Workshare Professional 7 that works within Microsoft Office, allowing users to review and compare changes to contracts, documentation, financial filings and other business documents when sharing between email, web portals and document repositories as well as to identify and manage hidden information (metadata).

The latest release simplifies the installation process, providing a more efficient configuration manager and much easier parameters management. Version 7 provides automatic detection and comparison of changes when attachments are sent, modified and returned through email, alerting users directly in Outlook.

By identifying changed documents and launching a comparison as modified documents arrive, it reduces the number of mouse clicks a user must initiate to compare documents. Additionally, the new version includes a Category View for document comparison.

Version 7 has a significant redesign to the metadata removal interface, which is now much faster to use and easier to understand, so users can more simply apply appropriate actions when emails are sent. Users can also now choose to process metadata removal with Workshare Protect Server instead of processing with the desktop client.

"The new upgrade to Workshare Professional provides our users with more efficient and effective document exchange and management," said Scott Smull, CEO, Workshare.

"Working collaboratively is only getting more common where teams within an organisation as well as groups from several organisations work together. Workshare Professional 7 makes document collaboration and comparison much easier and faster."

Workshare 7 is priced from $A50p.a. with volume licensing available for enterprise clients.

SharePoint and Outlook in sync

ProperSync has announced the release of ProperSync 1.3 for Microsoft Outlook, the latest version of the add-in that allows users to synchronise personal calendars, contacts, and task lists with SharePoint, optimising team collaboration by merging data into one location. Sharing Contacts, Calendars and Tasks across teams is a vital function to any organisation. Microsoft SharePoint provides this functionality; but by default, Microsoft Outlook only supports a set of predefined fields and stores Microsoft SharePoint items in special folders.

Using ProperSync, users can opt to share Outlook information with other team members directly within existing Outlook items providing a single data view within their Outlook or mobile client. The team calendar can also be downloaded directly to a user's primary calendar. Users can also upload some or all appointments to the office calendar to notify the team of their whereabouts.

Carsten Winsnes, Principal of ProperSync, said, "It allows business users to stay within Microsoft Outlook instead of switching to other programs to share important items with their team. Users can see SharePoint appointments directly on their primary calendar. Once it is configured for a user within Outlook, all of their devices are updated."

Industry Watch

HP is set to hand over $US10 billion in cash to acquire UK software giant **Autonomy,** a purchase that will see the company marketing a broad portfolio of overlapping document and records management and email archiving solutions.

Autonomy's Worksite product, acquired with the purchase of Interwoven in 2009 for $US775M, has a leading market position in the legal and financial sector. Prominent local Worksite users include leading Australian law firms Freehills, Norton Rose and Gadens and HLB Mann Judd, one of Australia's leading accounting firms.

When HP acquired Australia's Tower and the TRIM EDRMS in 2008, the company saw acquisition as its spearhead into the "fast-growing electronic discovery and compliance software market." The same mantra is now being recited following the purchase of Autonomy, which sells competing platforms.

The TRIM EDRMS has a strong uptake in all levels of government in Australia.

According to HP's announcement, following the acquisition, Autonomy will operate separately and continue to be led by founder Dr Mike Lynch

Australian print and imaging specialist distributor **Alloys** has announced the addition of **Contex** large format scanners to its Document Management portfolio.

Alloys Document Imaging specialist, Greg Powis said "Today, governments, companies and most other organisations are digitising their records like never before.

"The addition of Contex large format scanners to our Document Imaging portfolio now provides our reseller partners with the ability to sell custom scanning solutions into the rapidly growing CAD, GIS & Technical Graphics markets"

Australasian ECM consultancy **Blumark** has become primary local partner for **EntropySoft**, a specialist in enterprise connectivity and content integration.

EntropySoft's Content Hub enables synchronisation of a selection of documents between different ECM systems. A recently introduced Twitter connector offers a way to archive Twitter content.

"Our relationship with EntropySoft fits with our philosophy to bring best in class solutions to market from leading vendors in Enterprise Content Management (ECM)", said Mark Grimes, Blumark's Managing Director.

"I see Content Hub, the EntropySoft integration suite, as being at the forefront of innovation in the content integration space and Blumark is pleased to deliver this to the Asia-Pacific region."

FileBound Australia has announced the appointment of **Desktop Imaging** as its exclusive distributor in New Zealand, handling the full range of document management and workflow automation solutions. FileBound functions including advanced search and retrieval, user customisable workflow, electronic forms and full API accessibility.

"We spent considerable time this year looking for a suitable partner in New Zealand. The decision to appoint Desktop Imaging as our exclusive New Zealand distributor was a very easy one. Desktop Imaging has an extremely strong pedigree in Records and Information Management as well as having a corporate culture that aligns very strongly with ours," said Lee Bourke, CEO of FileBound.

"Desktop Imaging have a fantastic client list already and we look forward to working closely with them to provide these clients with superior Document Management and Workflow solutions."

"Our reseller agreement with FileBound Australia is a natural part of our evolution as a business. We have been looking for a company that shares our philosophy of excellent customer service with quality as the highest priority, and we have found that in FileBound," said Braden Rowe, Director of Desktop Imaging.

Hitachi Data Systems Corporation (HDS) has acquired network attached storage (NAS) specialist BlueArc, a company it has had an OEM relationship with for over five years.

BlueArc enterprise NAS solutions are used in a variety of markets such as health and life sciences, media and entertainment, telecommunications, energy and e-discovery..

BlueArc provides file-based virtualisation, built-in intelligent tiering, automated data movement capabilities for unstructured data and tight integration with the Hitachi file, content and block portfolio.

EVENT DIARY

Australian Information Security Association National Conference.

9 November, Sydney Convention Centre

Speakers include Bruce Schneier, Chief Security Technology Officer, BT; John N. Stewart, CSO, CISCO; Michael Harte, CIO, Commonwealth Bank of Australia; Michael Jones, Chief Technology Advocate, Google. Free for AISA members and you must be a member to attend.

www.aisa.org.au/national-conference

Gartner Symposium/ITxpo 2011

14-16 November, 2011, Gold Coast Convention & Exhibition Centre

Over 150 sessions, workshops, how-to clinics, roundtables and more provide immediately actionable advice on today's hot topics, including mobility, context-aware computing, social media, business intelligence, cloud computing and much more. Mastermind keynotes from industry leaders including ABC managing director Mark Scott and Commonwealth Bank CIO Michael Harte, as well as case studies and panel debates.

www.gartner.com/au/symposium

2011 Information Policy Conference Public Sector Information: A National Resource

15 November 2011, National Convention Centre, Canberra

Find out about the progress of the open government reforms, learn about the OAIC's Principles on open public sector information, discover how technology provides new opportunities for information management, exchange and sharing.

www.oaic.gov.au/news/events.html

Stephen Few: Visual Business Intelligence Workshop

15-17 November - Bayview Eden Hotel, Melbourne; 21-23 November – Rydges lakeside Hotel, Canberra

Learn How to Effectively Present and Analyse Quantitative Business Data. This course provides practical skills for analysis that is useful to managers at all levels and to anyone interested in keeping an eye on the business. It is designed for anyone who has a need to present or analyse data, including managers and business analysts, business intelligence developers and application developers.

www.altis.com.au/education/visualbusinessintelligence.php

SHARE SharePoint Conference

28-30 November 2011 Novotel Manly Pacific

A SharePoint Conference designed to help business users address business issues

www.shareconference.com/au/

Australia SharePoint Conference

20 - 21 March, 2012 , Hilton on the Park, Melbourne

The Australian SharePoint Conference is organised by a group of dedicated SharePoint MVPs and Community leaders who participate and support the community through organising and sharing their knowledge at user group events.

www.sharepointconference.com.au

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