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Objective CEO in
the driver's seat



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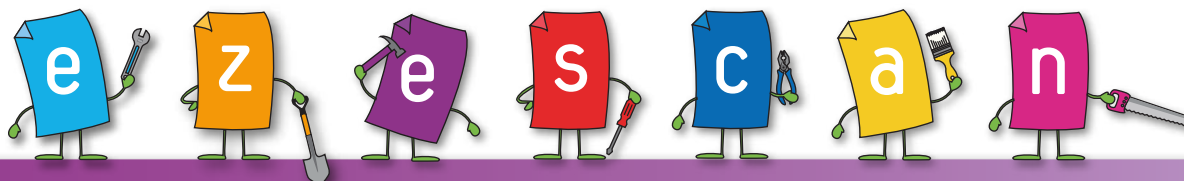


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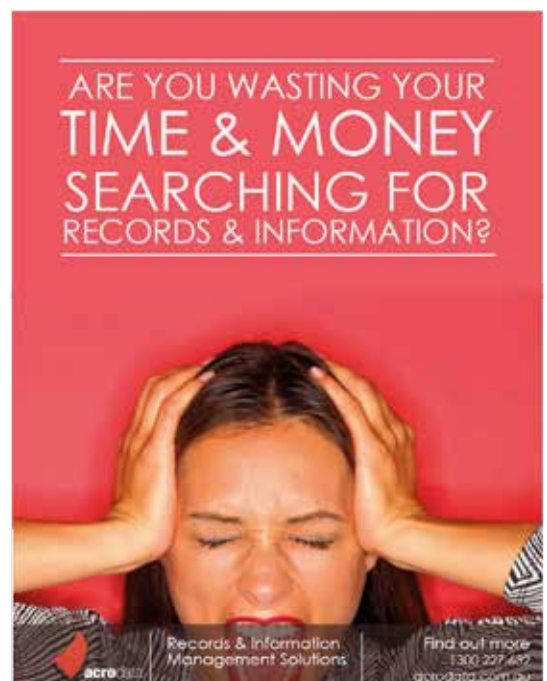
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DocuSign brings eSignatures to Office 365

Microsoft and DocuSign are teaming up to provide DocuSign's eSignature apps widely available from within Microsoft Office 365.

DocuSign's eSignature apps for Office 365, available in the Office Store in early March, will provide customers with the ability to submit and sign documents without leaving Microsoft applications, allowing them to quickly, seamlessly and confidently transact their business.

DocuSign's new solutions, built on the Office 365 platform, will include integration within Outlook, Word, SharePoint Online and SharePoint Server 2013.

Office 365 and SharePoint administrators will be able to add DocuSign Apps for all users directly from their administration consoles.

DocuSign has adopted Windows Azure Active Directory to provide single sign-on capabilities with Office 365 credentials. DocuSigned documents are automatically stored in Microsoft OneDrive.

Alloys expands distribution locations

Imaging distributor Alloys has extended its Australian footprint to include operations in Melbourne, Sydney, Brisbane and Adelaide.

The expansion is a result of the recent Alloys acquisition of Integrex Systems, which was announced in July 2013.

The expanded Alloys operation now offers localised sales teams and distribution centres in these locations for faster fulfillment of orders across Australia.

Alloys CEO Paul Harman said "The new business brings the strength of Alloys and Integrex together to provide our customers and suppliers with an even stronger reason to business with our team."

He added "It means that Alloys and Integrex will now be one brand, with one goal, one sales methodology and managed as one team. This will give our customers and suppliers an easier line of sight as to how to work with us, and allows us economies of scale that we haven't had before."

BPO Converga acquires Speedscan

NZ Post subsidiary Converga has acquired Speedscan Group Holdings to extend its reach in its core markets in Australia, New Zealand, the United States and Philippines.

"The acquisition enables both companies to build on their strengths to the ultimate benefit of their customers and their people," said Speedscan chief executive, Mark Josman, who will remain with the merged operation.

"I think there is increasing complexity and there's increasing reliance on BPOs of scale and robustness, and so as that trend continues and large organisations outsource more and more mission critical processes, they're looking for larger and more complex solutions from larger and more complex participants.

"Our combined groups will see over 1,350 people across those locations and annual revenue over \$A100 million."

Founded in 1994, Converga specialises in Business Process Outsourcing with a focus on paper to digital document

conversion. The Speedscan Group was founded in 1997, and today incorporates businesses in Sydney, Melbourne, Manila, Auckland, Wellington and Christchurch.

Iron Mountain acquires TMS

Storage and information management company Iron Mountain Australia has acquired data protection firm Tape Management Services (TMS), growing its presence throughout Australia.

With the acquisition, Iron Mountain will assume responsibility for TMS's significant customer base. Terms of the deal were undisclosed.

Founded in 1997, TMS provides customers with solutions for storing, accessing and managing their media.

Telstra loses Office365 monopoly

Prospective Australian customers for Microsoft's Office365 cloud suite will have additional choices beyond the Telstra T-Suite from April 2, 2014.

According to a post from Steven Miller, Business Group Lead, Microsoft Office Division, SMB customers will also have the choice of purchasing Office 365 "either via an Open License agreement, through the Microsoft Online Portal or via retail partners who support Electronic Software Distribution (ESD). Open License and the Microsoft Online Portal will be available through Microsoft resellers."

Office 365 will continue to be available via Telstra T-Suite. Microsoft resellers will have the ability to bundle Office 365 with existing services and bill for Office 365 as part of the total service offering.

Another new announcement is that Microsoft's cloud-based PC and device management platform, Windows Intune will also be offered via Microsoft resellers. Pricing details have not been announced.

NewsGator transforms to Sitrion

NewsGator Technologies has announced it adopting the name of its October 2013 acquisition Sitrion and will focus on social solutions for Human Resources (HR) self-services and SAP.

"Our new corporate identity signifies our transformation into a company focused on world-class solutions empowering people to work better," said Daniel Kraft, NewsGator's President & CEO.

"New ways to network require new technologies to make it work and our mission is to do just that: unlock the amazing power realised when people connect and align behind a goal."

We believe Social is going to be an integral part of work, just as processes or resources are, and we felt it was time to say good bye to our beloved name. Our vision is much larger than news aggregation. Our vision is larger than even "enterprise social". We're excited to take on the challenge of making work better, and we wanted a name that was open to everything involved in that scope.

Sitrion has also appointed a new Director of Services based in Sydney, Mike Jacobanis, who has over four years of experience with Sitrion in designing social strategies.



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DocsCorp releases next gen document comparison

DocsCorp has announced a major upgrade to its compareDocs document comparison software, which allows users to compare two versions of a document for differences no matter what the format.

compareDocs and its companion products, cleanDocs and pdfDocs, have undergone a complete interface redesign to present a common, modern look.

With a new Microsoft Office 2010/13 look and feel it offers improved startup and document comparison speeds, as well as the ability to create PDF documents from any application. Track Change output now allows users the ability to choose to output the comparison in an improved Track Changes format, to accept/reject the changes and to continue using the document as the "go forward" version.

Users can specify languages in their documents using the new OCR Language Chooser to improve results in OCR'd documents with support for 180 languages including Asian languages. A single click enables users to compare two PDFs, which will be marked up in traditional redline format, and then automatically converted to Word.

compareDocs can produce either a Track Changes document with the comparison results, or a redlined output. This gives the growing number of users preferring to work with Track Changes the ability to accept or reject changes in a third document, in addition to benefiting from compareDocs reliability, accuracy and usability.

compareDocs is the only specialist comparison product that can compare PDF documents natively, that is, it doesn't convert the document to another format as part of the comparison process. The result is a faster, more accurate comparison.

The compareDocs interface lets you compare anything to anything (Word to Word, PDF to PDF, Word to PDF as well as image files), working with applications like MS Word, Outlook and PDF Readers. compareDocs also provides deep integration with leading Document Management Systems (HP Worksite, NetDocuments, OpenText, ProLaw, Worldox and MS SharePoint).

A free 30-day trial is available at www.docscorp.com/comparedocs

Encrypted search for SharePoint

Cryptzone has unveiled a new version of its Microsoft SharePoint document security solution, Secured eCollaboration. In this latest version, new features have been added to secure content, without impeding searchability and collaboration between internal and external teams - both crucial capabilities for SharePoint projects. Essentially, the results are filtered according to a user's permissions, ensuring confidential information is only disclosed to those with the correct clearance.

"Organisations increasingly recognise the need to secure confidential information stored within SharePoint repositories," explains Anders Hansson, Product Portfolio Manager at Cryptzone. "Traditionally, SharePoint's search functionality leaves files encrypted at rest undiscoverable. This requires organisations to make trade-offs between their security posture, user productivity and convenience. By developing Encrypted Content Search in our Secured eCollaboration solution, we get around this deficiency, without compromising security."

Utilising sophisticated approaches to key management and process whitelisting, encrypted content on SharePoint can only be searched and discovered by authorised users. This approach respects the principle of the separation of duties, preventing SharePoint administrators from viewing protected content.

With Secured eCollaboration installed, authorised users are able to perform search operations from within Microsoft SharePoint and find encrypted content that matches the search criteria entered. Secured eCollaboration makes use of Microsoft iFilter technologies to ensure the process is completely transparent to users, but only returns search results based on a user's entitlement to secured content on a document by document basis.

Even though data at rest is fully encrypted and protected, content can quickly and easily be found by those people with the appropriate security clearance. Where necessary, Secured eCollaboration security administrators have added flexibility to enable or disable SharePoint powered file-searches of encrypted content on a user by user basis.

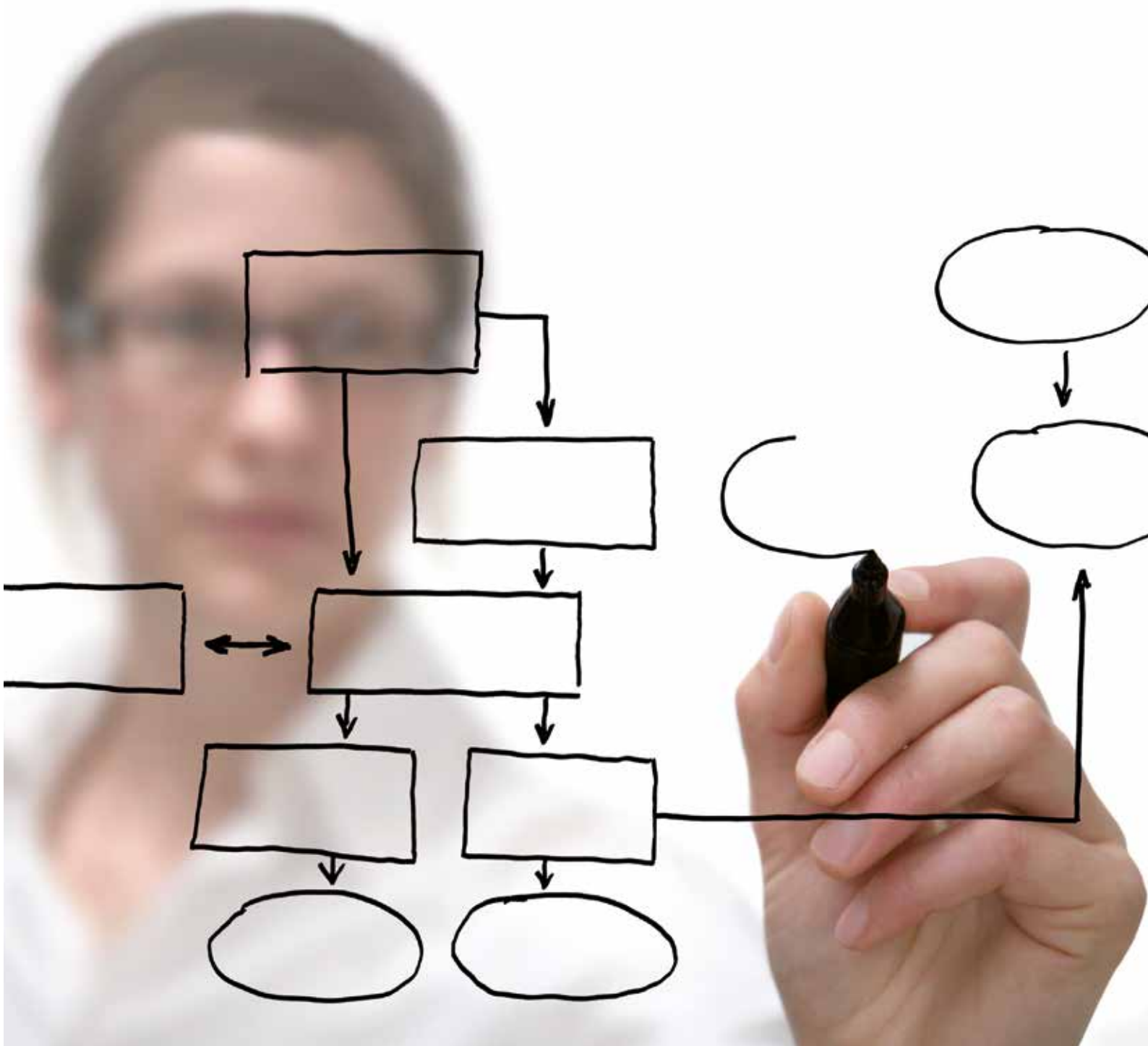
Version 5.0 of Secured eCollaboration also introduces support for SharePoint Form Based Authentication, which provides an alternative means of authentication to SharePoint using a web form. FBA is commonly used as a way of extending access to a SharePoint site for non-Active Directory users, so is ideal for corporate extranets, where supplier, partner and customer access is required. Secured eCollaboration adds an additional layer of non-intrusive protection for sensitive personal and commercial information assets.

Secured eCollaboration Rule Based Engine can now control SharePoint file permissions, making it possible to create rules that significantly extend SharePoint's native access controls:

Access rules can be defined and based on content, meta-data or other file attributes. For example, if a file containing sensitive information gets uploaded to a public area, RBE can automatically modify the SharePoint access control to prevent unintended exposure. Access rights in SharePoint are typically managed at the document library level. With Secured eCollaboration user access can be assigned to individual documents, so if inadvertently moved to an unsecured document library they still retain their assigned user access rights and remain fully protected.

The latest version of Secured eCollaboration also adds functionality for security officers to delegate file access to any user on request, or as part of a security audit. This increases the available options in any disaster or recovery process relating to sensitive information. At short notice there is an efficient yet effective way to correct or mitigate risks related to unintended data leakage. The file access management interface allows for assessing the integrity of an organisation's file-access perimeters, and provides mitigation options that have global impact instantly. Administrators can quickly locate a file, and grant or remove access to any user in the world - a powerful ability.

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Tony Walls: winning is more than a passing fascination

Founder and CEO of Australia's Objective Corporation, Tony Walls is driven to excel at whatever he does. Be that building a successful global enterprise software company, or hurtling around a racetrack on weekends competing against professional drivers in Carrera Cup, a fully-fledged national motor racing championship that routinely acts as the premier support category for the V8 Supercars Championship.

Tony Walls says that while business is his favourite sport, he enjoys the challenge of competition outside the office as well.

His urge to compete has been a driving force in his 25 plus years carving out a leading role in the information management market for Objective. Motor racing started as a consequence of spending time at the kart track in recent years, as an opportunity to share a fun pastime with his young children.

Given his competitive nature it wasn't long before he started racing karts competitively himself, winning multiple championships. Then, when the opportunity presented itself in 2013, he stepped up to competing in the Carrera Cup with his team, Objective Racing. It was a "now or never" moment, and Walls hates words like "never" and "can't".

Walls, a resident of Pittwater on Sydney's northern beaches, earlier took up sailing when he realised he needed challenges outside of the work environment. He built a sailing team which, in just four years, won the Australian Championships in the Sydney 38 One Design class.

"I spend a tremendous amount of time focussed on Objective's success, outside of my family, it's my number 1 passion. But I found long ago that I needed diverse interests to keep me energised" he says.

"I like competing. I approach business like sport and sport like business. Anyone who has been successful in team sport approaches it like a business. You need the absolute best people around you to win."

Objective Australia was another personally sponsored initiative from Walls to create and support Australia's team that recently competed in San Francisco in the inaugural 2013 Youth America's Cup. Whilst the Cup was ultimately won by the New Zealand team, the Objective Australia initiative gave a group of young Australians the development opportunity of a lifetime - to sail on the world's largest stage, in the same high performance AC45 catamarans that they used in the America's Cup World Series.

The passion for success on the racetrack and on the water is even stronger in his quest for success for Objective to lead in the public sector and regulated industries where they compete with a portfolio of Information Management solutions.

Defence challenge

The jewel in the crown is Objective's largest customer Department of Defence.

"What I've always loved about Objective's relationship with Defence is they keep bringing us fresh challenges for managing information on a massive scale. I don't believe that anyone else in the world has a single solution doing what Defence is doing.

"To the credit of the team at Defence and our own engineering team, we're ahead of the curve, and that curve is often steep."

The sheer scale at Defence has always been one of its greatest information management challenges. Today, there are more than 100 shelf kilometres of physical records and over 160 mil-



In his first year as a driver racing in the Carrera Cup in 2013, Walls was the only amateur driver to finish all 20 races in the season including top 10 finishes against a number of professional racing teams. He ended the championship in the upper half of the entire field.

Although his number 6 car is emblazoned with the Objective logo, Walls is keen to point out that Objective Racing is his personal initiative and not funded by Objective Corporation.

lion electronic records in Objective Enterprise Content Management (ECM).

Defence has 60,000 people using Objective ECM each week, making it the fourth most used application in all of Defence. The final roll out to the Defence Science and Technology Organisation (DSTO) will bring the total number of Defence personnel using Objective to 67,500. Those users are creating 160,000 new documents every day, around five documents per second. In the last twelve months Defence has added 60 million documents to their Objective system.

R&D commitment

Walls is focused on the longer term and has made a significant investment in Australian R&D over the past 10 years. He believes that this investment positions Objective incredibly strongly in a perennially competitive environment.

"Objective is routinely investing twice the industry average in R&D, well over 20% of revenue. As a result, the commercialisation of our portfolio of solutions has probably doubled over the past two and a half years," he said.

Objective's product offerings are also broadening as a result, beyond their own ECM customers. This began with the launch of Enterprise Search for HP TRIM in 2011 and the secure information sharing and process management platform, Objective Connect for Objective ECM, MS SharePoint and HP TRIM, in 2012.

These will soon be joined by dedicated solutions offering Governance and Workflow for SharePoint users.

"Objective ECM continues to deliver, our customers are very invested in it and we're very invested in it. New customers are investing in the solution, in many cases replacing an existing EDRM system.

"Objective 8 has had the fastest take up of any platform we've had in our entire history; full credit to our customer relationship

team and again our product management / engineering team. More than 70% of our ECM customers have already upgraded to Objective 8, so by any metric it's a phenomenal result.

"Based on the success we have had with helping customers automate their business processes, we are bringing new solutions to market that add significant value to customers of other EDRMS systems. We've built connector technology as part of Objective Connect and our Workflow solution that allows us to bring connected process management to all organisations." said Walls

Walls is adamant that Objective remains firmly committed to its core ECM platform. While the competitive landscape has changed remarkably over the past 15 years, he believes the history of acquisitions of ECM vendors by large enterprise software companies demonstrates the advantages of remaining firmly devoted to specialising in managing unstructured data.

"With all the acquisitions of ECM companies that have taken place over the last 15 years, every product that gets acquired by a global enterprise software company seems to diminish or disappear" he said.

"You can see it and you ask, "Why is that?"

"I think it really comes down to focus.

"ECM done properly touches virtually every person in an organisation, you have a different mindset about the strategic value of information, where you invest your innovation dollars and the expertise you need to give a customer a successful project outcome"

"To educated buyers, of which most are these days, enterprise systems are no longer about a feature function bake-off. It really is about having an informed discussion about how you are going to add value and produce measurable outcomes".

"The core questions really are "Can you deliver me the business outcomes I am looking to achieve and how well are you going to support me as a customer over the long term?"

"They are the two core questions no matter what solution you're buying. Today, Objective has incredible strong domain expertise and I think Objective globally has one of the strongest evidence bases of having delivered reference-able outcomes for our Customers. Ultimately, that grows trust in your brand."



"Objective is routinely investing twice the industry average in R&D, well over 20% of revenue. As a result, the commercialisation of our portfolio of solutions has probably doubled over the past two and a half years"

ECM Market

Tony believes that there is still an outstanding opportunity for ECM market to grow because many organisations who bought a competitors ECM over the last decade haven't always achieved the outcomes that they were looking for.

"A lot of people are coming back to market, not necessarily just looking for the next generation of product, but because they didn't really succeed in implementing EDRMS or ECM the first time.

"I believe that there's a significant opportunity. However customers are now saying "I've got an information governance problem or an efficiency problem. I need a solution that gives a great end-user experience, is simple to use and I need to comply with myriad of government legislation, but it needs to do that as a by-product of automating my business processes".

A little known fact about Objective is that the majority of their customers with Objective Enterprise Content Creation (ECC) and Objective Connect use cloud and hybrid cloud based solutions already. While the talk in the industry for hybrid and cloud-based ECM solutions has grown in volume in recent time, Objective's ECM customer base remains largely on-premise. Given the sensitivities over security and data sovereignty, integration and customer control over change management, for the average ECM user this is understandable. In 2013 Objective's made a significant step towards overcoming these sensitivities and launched a cloud based ECM, Objective ECM for Small Agencies.

"The reason we built Objective ECM for Small Agencies was following a very detailed engagement with National Archives of Australia.

They said: "Small agencies need the business outcome but they need an enablement strategy that removes the complexity of building a business classification system and reduces the ongoing

(Continued over)

"Objective is one of the few organisations on the planet that focuses on information management exclusively. If you exercise that muscle every day of every week of every year, with an outstanding team of people, naturally you are going to become very strong in that discipline." - Tony Walls.

(Continued)

requirement to manage a larger enterprise ECM.

"So, we took the collective wisdom that we have gained from implementing hundreds of thousands of users of these systems over the last two decades and delivered a preconfigured system via the cloud."

"Objective provides the customer with flexibility and choice in the way that they purchase and implement their solution," said Walls

"Will everything ultimately end up in some type of Cloud? I suspect so. How long is that journey going to take? While I can't give you a specific answer, I can say I don't think that it's going to be in the next three years. I do know that customers that make the decision to move enterprise systems to the cloud will be moving for solid business reasons not just because the cloud term is fashionable."

"In 2012 we introduced Objective Managed Services for our on premise ECM customers. Every Managed Services customer has renewed their contract and the Service is growing rapidly because customers have realised that, as experts and with a pool of expertise, Objective can often manage their ECM more effectively and efficiently than they can.

"And ultimately, that's the real value proposition of the cloud. A customer doesn't have to worry about running the system, because someone competent is looking after it and they can pay for it over a contracted period".

Objective Connect

The launch of Objective Connect in 2012 was simultaneous with the Version 8 ECM upgrade, which is required to make full use of Connect's secure information sharing and process management functionality.

"The uptake of Objective Connect has been very good and we now have a lot of organisations converting to the paid platform. We adopted the model where a recipient of information doesn't need to pay to receive information.

"Customers only pay when they want to share information with others. It's similar to the familiar concept of Acrobat Distiller and Acrobat Reader, where you only pay for the capability to create a PDF but not to read it. We have some great examples of government agencies who have transformed their business processes using Objective Connect. IP Australia is using Connect for their Intellectual Property Oppositions Proceedings process. Further afield we have key customers, such as the UK Cabinet Office and the Welsh Government."

Walls downplays the comparisons that are invariably made with Objective Connect being described as a "Dropbox for Government".

"If you look at the heritage of Objective, we've been implementing multi-server systems across government for a long time. There are still massive silos of information across government and we are finally able to link those up. Objective Connect enables the connection of information and processes across those departments and agencies. A government process typically involves a document or case file of some sort. Connect allows you to securely manage that case file through the reviews, approvals and conversation threads that occur around those documents. Objective Connect is all about connected process management, which is much more than a "Dropbox for Government."

"Our ultimate vision is to connect government, by enabling processes and information to transcend organisational boundaries and also connect with private organisations and citizens. To connect government the culture of government had to change and the technology had to change. With both of these occurring Objective is uniquely positioned to allow an organisations to drive more efficiency and greater strategic value from their information."

Objective adds local government wins

Objective Corporation has announced ongoing expansion in local government, with Sutherland Shire Council and Redland City Council in Australia, as well as Tauranga City Council, Gisborne and Nelson District Councils in New Zealand, selecting the next generation information and process management solution, Objective ECM 8.

Redland City Council recently completed phase one of its data migration from TechnologyOne ECM, Sutherland City Council are migrating from its legacy Lotus Notes/Domino.doc system, Nelson City Council and Gisborne District Council migrated from OpenText eDOCS and Tauranga City Council migrated five million documents from Dataworks to Objective ECM 8.

Tony Walls, CEO of Objective Corporation said, "Objective is the information management platform of choice for local government, with more than 250 customers globally. Our proven ability to deliver improved efficiencies by uniting the silos of information and automating business processes for an organisation enables them to meet the increasing needs of their communities, while ensuring business and legislative requirements are met."

Sutherland Shire Council, the second largest Local Government council in NSW, has selected Objective ECM 8 to enhance efficiencies and remove silos of information. The implementation will replace legacy systems and integrate with key applications and semi-proprietary systems.

Trevor Rowling, Manager Administration and Governance, Sutherland Shire Council said, "We chose Objective ECM because the Objective team demonstrated thorough knowledge of local council processes and understood our specific information management requirements better than anyone else."

"By implementing Objective ECM, we will also have the ability to seamlessly integrate with our new Customer Request Management System. This collaborative approach will enable Council to take the service we provide to our community to a new level."

David Macniven, CIO of Redland City Council said, "To achieve greater efficiencies in our organisation, we realised that we needed to consolidate our unstructured data into one central repository linked to our existing line of business systems. This would also enable us to improve our management and enhance service delivery to ratepayers. By implementing Objective ECM, we will unite our data and collaborate more efficiently both internally and with the community.

"Objective ECM 8 is part of our broader strategy of change. We continue to sharpen our focus on improving the level of service that we provide to residents by putting their needs first. Objective will help us achieve greater efficiencies and deliver real value to our community."

Tony Walls said, "For 25 years we have enabled our local government customers to deliver measurable outcomes for the communities that they serve and we are committed to continually delivering solutions that meet their specific requirements."

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Going for gold with ECM at 2018 Commonwealth Games

When Megan Cappelleri was appointed Manager Information Management for the Gold Coast 2018 Commonwealth Games Corporation (GOLDOC), she was certain she had just landed her dream job

As a Gold Coaster, not only was she firstly able to share the region's excitement about the impact of the expected \$A2 billion impact in infrastructure and tourism for the region.

There was also the professional challenge of structuring and implementing an information management regime for a Greenfield project at an organisation that will grow to over 1000 employees and 15,000 volunteers by the time the sporting extravaganza begins on April 4 2018.

Ask any information manager at a large organisation what are the major headaches of the job and you will get some pretty stock standard answers: users are resistant to change, they won't alter their embedded practices, there are unmanaged information repositories all over the shop, and unstructured data is out of control. When Megan came on board with GOLDOC in August 2012, there were only 15 staff and the IA and enterprise application platforms were a blank slate. This placed her in the enviable position of being able to implement an enterprise content man-

agement (ECM), intranet and collaboration platform before bad habits were allowed to form.

"As an organisation we have obligations to the state of Queensland in terms of the way that we manage our information, but we also have obligations to the Commonwealth Games Federation. So in terms of our planning and our establishment, we need to make sure that we're balancing both of those compliance requirements as we've moved forward," said Cappelleri.

The prospective growth in headcount between now and 2018 meant onboarding flexibility and scalability was a major consideration.

It was decided to take an atypical approach to begin with the selection of an ECM platform before deciding on major corporate application applications ... OpenText was the selected vendor



When it stages the largest sporting event Australia will see this decade the Gold Coast will also become the first regional Australian city to ever host a Commonwealth Games.

"Also we're not establishing a corporation to go on forever, we're establishing a corporation for a five year journey. So in what we build now, we also need to always be planning for what we leave as a legacy to both the state of Queensland and for the future Commonwealth Games host cities," said Cappelleri.

"So to establish an information management function, we needed to consider what corporate applications were we likely to have, and how would the solutions that we selected potentially work with those types of solutions. We also needed to consider data migration requirements."

As Knowledge Manager at a Queensland water utility Allconnex Water (established in July 2010 to amalgamate the water businesses previously held by three local government authorities) Cappelleri already had experience in designing an information management architecture.

When faced with the challenge of doing the same at GOLDOC, it was decided to take an atypical approach to begin with the selection of an ECM platform before deciding on major corporate application applications including payroll, finance, procurement, HR, contract lifecycle, business intelligence, and CRM.

OpenText was the selected vendor for all document, records and content management, with Knowledge Partners as the implementation partner. The selection was announced in March 2013, while decisions on corporate applications are set to be announced in mid-2014. Datacom has been selected as managed service provider for the standard Windows server and desktop environment with Windows 7 and Office 2010.

IA Platform

"I think that it's fair to say that information management underpins any business and any solution," observes Cappelleri.

"So it was my sentiment that if we had our information management right, and had people thinking about the way that they were managing their data and working with their information, that would then transpire into all corporate applications, and we'd have a robust information management architecture that we could then build on in terms of business intelligence and



"I think that it's fair to say that information management underpins any business and any solution," - Megan Cappelleri, GOLDOC Manager Information Management

reporting and analytics and everything that we needed out of the other.

"We were in a fortunate position as a Greenfield to not have to get solutions to meet our existing processes; we could actually build our processes around solutions."

"Also, again I was fortunate enough not to have to come in and do a lot of change management and break bad habits in terms of the management of paper.

"Professionally, being involved in a Greenfield environment is always great, because you get to plan how you really want things to be done, without trying to establish new ways of doing things and dragging people along the change journey. It is really refreshing to be able to be part of something from the ground up that will contribute significantly to the successful delivery of a great Commonwealth Games in 2018.

"It is quite exciting what we are doing with OpenText with the help of Knowledge Partners, not just as a records and document management system, but as an entire content management system.

"So far in our deployment we have created an intranet using OpenText Communities, which is our landing page for all of our staff as soon as they open Internet Explorer, so it gives them direct access to our content management system straight away. We are also looking at a raft of workflow-enabled capabilities so that we can work with our games delivery partners and external clients in terms of, approval processes for the use of our brands and emblems and things like that.

Social Media

"We already have a very large social media presence, so we will be looking at integrating that, but we're also using OpenText socially internally as well. We have tools like Pulse, which allows us to follow each other, follow documents, set notifications. So we're very collaborative in the way that we approach our work."

Collaboration is a huge challenge for GOLDOC. As well as working with international sporting bodies to coordinate the participation of 6500 athletes and team officials from 70 countries at the Gold Coast 2018 Commonwealth Games (GC2018) itself, there is the task of coordinating with multiple layers of federal, state and local government in Australia in preparation for the event. These include police services, emergency

"We were in a fortunate position as a Greenfield to not have to get solutions to meet our existing processes; we could actually build our processes around solutions."

services as well as transport and main roads authorities.

"OpenText is assisting here with the delivery of collaborative work spaces for our delivery partners, so that the people that we work with, have got a secure repository where our internal staff can work with external parties and still manage version control and security of our documents," said Cappelleri.

"And we're also using OpenText Everywhere to access ECM from smartphones and tablets, because we're such a mobile workforce, and our mobility will increase as we grow and move into GC2018 venues; this way everyone's got at hand access to their documents and records via their iPhones or iPads or whatever they need to take on site.

"We'll be doing some work with Queensland State Archives in the near future to develop a GC2018 specific retention and disposal schedule. At the moment, we are still holding the paper physically for all of our incoming correspondence, which is day boxed but our rule is if a document is born electronic, it remains electronic. We route our correspondence electronically, so ends users don't typically deal in paper, but we will still maintain the hard copy until we've got the appropriate retention and disposal approvals in place."

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Hertz drives ahead into paperless accounts

Hertz Australia says it has saved \$A70,000 in its first 10 months of live operation by reducing the time and labour to process accounting documents with Kofax capture solutions. Headquartered in Melbourne, Hertz Australia's accounting department manages the financial processes for many Hertz locations and franchises across Australia and New Zealand.

The accounts payable and fleet accounting departments previously used manual systems to process hundreds of thousands of accounting-related documents – such as invoices and new vehicle purchase paperwork – annually. By early 2012, both departments were overrun by paper. Accounts payable in particular was running out of space to store the paperwork required to process 5,000 invoices a month.

"Although we used Oracle Financials, we completed many invoicing processes manually," said Anne Kavanagh, Fleet Accounting Manager, Hertz Australia.

"Documents moved from desk to desk as we checked and approved them. We then filed the final invoices in one of our many cabinets, boxes or trays."

The fleet accounting department faced similar issues. The department manages the onboarding process for new Hertz vehicles.

Staff members were manually processing the invoice, registration documents and onboarding cost information for each new vehicle. They then scanned and emailed the batches of documents to the Hertz Corporation Shared Services Centre located in Oklahoma, USA.

Hertz Australia buys thousands of vehicles a year, which meant the department was printing around 50,000 documents a year.

Redundant processes

"We were also entering the same information into spreadsheets and then manually filing the paperwork," said Anne. "The whole process was extremely time consuming and prone to human error."

In early 2012, Hertz Australia sought a solution that would enable both departments to automatically capture and store the huge volumes of accounting information they had to process. They wanted to minimise time-consuming manual processes, improve staff productivity, cut paper and printing costs and reduce the risk of human error. They also wanted to improve the visibility of the accounting information, so they could more easily share it with suppliers and other Hertz departments in Australia and the U.S.

After evaluating data capture and storage solutions from a number of vendors, Hertz chose to implement Kofax Capture and Kofax Transformation Modules. The solution was implemented by Data Capture Experts.

Kofax Capture scans documents and forms to create digital images, extracting index data for retrieval purposes and delivering the images and associated data to a variety of repositories and applications. Kofax Transformation Modules adds document classification, page separation

and data extraction and validation capabilities to complete the process.

"Kofax was the most cost-effective solution and the only vendor that we felt offered a full solution that met our requirements," said Anne.

This integrated solution automatically captures information from paper and electronic documents, transforms it into structured, accurate and actionable data and delivers it into Hertz Australia's core business applications and workflows.

The accounts payable department was also looking for a robust data storage solution that would integrate with its Oracle Financials system. Data Capture Experts, the

"We now have the capacity to process 800 invoices per day, compared to only 200 per day in the past" - Anne Kavanagh, Hertz Australia.

certified Kofax Partner working with Hertz on the project, recommended that they implement Microsoft SharePoint.

Kofax Capture and Kofax Transformation Modules now deliver data straight into Microsoft SharePoint, which uses the information to populate column data and trigger business rules and workflows. Microsoft SharePoint also sends accounts payable invoice information automatically through to Oracle Financials. Hertz Australia went live with the new data capture and management system in late 2012. In August 2013, the company completed phase two of the project, which enhanced the integration between the Kofax and Oracle systems.

Incoming invoicing, onboarding and registration information for new vehicles now flows straight into the Kofax system for data capture and checking, then moves into Microsoft SharePoint, which automatically batches the documents. Fleet accounting staff can now easily export relevant information into Excel, rather than filling in spreadsheets manually.

"We've reduced the time we spend manually validating new car data from a full-time job to an average of only three hours a day," said Anne. "This has freed up two members of staff to complete more value adding tasks in other departments, while significantly reducing the risk of human error. In the past, up to 20% of our documents had to be redone. Now, there are very minimal mistakes."

The automated, online processes have also enabled the department to dramatically reduce the amount of paper it uses. Combined with the reduced headcount, this has cut the department's operating costs by around \$A30,000 per year.

"The whole department is more efficient, which has increased staff productivity and morale, and improved our relationship with other offices in Australia and in the U.S.," said Anne.

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Haitham M.N. Ahmed,
Deputy Director General (Operations)
Aspire Logistics

A SharePoint Hitlist

10 things I hate about you

By Kate Fuelling

SharePoint has been part of my life for a couple of years now, and so I think it's time to assess our relationship. The first thought that came to mind was 'it's such a pain'. If I had a little brother, SharePoint would be it. I thought I'd explore what about SharePoint annoys me the most. One warning before you read my list - it's a vent. But bear with me...as my ex-bosses can testify to, once I've vented I can be quite reasonable.

1. I can never just get the whole list of documents on one page

I don't want to click to another page and another to see the rest of the contents of the library or results of the search I've conducted. I just want to see them all on one page, scroll through them; filter them. Typical SharePoint, you can change the default setting as to how many documents are listed on a page, but no one ever does change the default, and I'm sure I've heard a SharePoint implementer mumble something about return times being affected the more documents you list on a page.

2. When I close a document I've opened, the SharePoint page refreshes

Yes, it's a pathetic thing to complain about, but it just bugs me. The page disappears for a split second, just as my eyes are searching for another document in the list.

3. The Search function is not reliable

Because of the decentralised indexing configuration of the sites and pages, you can't be sure that the search function is picking up everything that you have access to. Even if you trawled through every parent and sub-site today and fixed all the settings, if a new site is created tomorrow without the correct indexing setup, you are back to square one. To be fair, there are add-on Search engines for SharePoint, however you really need to be a techie who enjoys working with complex equations to set up and maintain these engines as useful tools.

4. A list is a list. A library is a list but called a library. A discussion board is a list but called a board. 'Site assets' is a library that stores items that you put in your web parts.

I could go on! Once you get your head around things it tends to be fine, but it is not uncommon to hear of site administrators deleting whole pages because they thought the page was an unused library.

5. It is a free for all

A survey conducted by Axceler, (admittedly a provider of governance tools for Microsoft SharePoint environments) noted that 65 percent of IT managers had deployed Microsoft SharePoint enterprise wide, yet only 15 percent

have governance controls. Youch. I can show how that's going to work out. For Exhibit A; see our network shared drive.

6. Decentralised administrators

A further development of the point above, but it's so big it deserves at least 20% of my vent.

SharePoint is hailed as a tool that enables business units to manage and share their own information, therefore having their own administrator makes sense. They can be more responsive and have a greater understanding of what their business unit needs.

But wait, they don't like the corporate colours, so they create their own site template. By setting up this new template they also unwittingly opt-out of hierarchy defaults and suddenly every time someone creates a new library, they are creating an out-of-the box library that has none of the organisational settings on it; which isn't discovered until a couple of users have saved



documents there and realised they aren't filling out the normal fields when saving a document. Angst ensues.

7. It's not an EDRMS

I've always been someone who knows what they want, and when I see something I like, I want it. And I want an EDRMS. I don't want something that's got a few EDRMS components that aren't as easy to use and can't track hard copy documents (I know, I know, there's always improvements in new versions, but I still want an EDRMS!!)

8. It's painful to move things around

So your organisation has a restructure, and things need to be shuffled around. Because of the different configurations of sites, pages, libraries, lists, discussion boards etc. etc., the new location may be configured differently and the migration could hit a wall. Ever tried migrating documents stored on one SharePoint page to another? I know people that have and it wasn't pretty. All of the documents were 'migrated' but because library setting were different in the new location, all of the documents defaulted to 'checked out' and were not visible until the properties fields were updated and they were checked in. Manually. All 357 of them. Urgh.

9. It's marketed as a simple and easy to use option

Which is why there has been such a huge uptake of it, with fast-tracked implementations. Trouble is that organisations grossly underestimate the impact of an organisational-wide change and then continue to underestimate the risks, time involved, configuration requirements...the list goes on.

10. Nobody gets trained on it...well almost nobody

These days when you join a new organisation it is assumed you are proficient at mainstream email software (Lotus Notes, Outlook), as well as standard Microsoft Office applications. But now SharePoint is included in this list, and the problem with that is that SharePoint is so configurable that it looks vastly different in every organisation.

I know I'm being a bit unfair when I say that NOBODY gets trained on it. Some enlightened organisations do. The Site administrators do. They get a day's training where they are shown every possible method of configuration without any governance scope. When I attended my Site Administrator training day I was taught how to delete batches of documents when the library got too full. Well that's one way I guess...

So that's my vent. Thanks for sticking with me, and now for the rational part.

SharePoint is here and it's not going away anytime soon. A lot of the problems are caused through lack of knowledge of what the system can do, how complex implementation and configuration can be and a lack of knowledge of how best to fix or change things when issues occur.

IT and RM publications are full of 'how to get more out of SharePoint' and 'The top 10 things you should have in place for your SharePoint environment'. So there's really nothing new I can say that hasn't been said. So why are organisations still struggling with SharePoint? My ex-bosses at this point would be asking me, 'so now you've had your vent, why do you think it's still happen-

ing, what can we do differently?'

My answer would be that SharePoint is yet another victim of a project that has been poorly planned and thought-out, where impacts have been woefully underestimated, which has been implemented on an inappropriate budget with a lack of subject matter expertise (SharePoint and business processes expertise), has been poorly change managed, with not enough training done and once the project team has left the building, has been largely left to fend for itself as business-as-usual.

So unfortunately I expect to continue my rocky relationship with SharePoint for a while, at least until my little brother grows up, or our parents start disciplining it better.



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How to ace the Privacy Amendment Act

Dana Simberkoff

With privacy breaches and security threats making headlines around the world on a daily basis, it's becoming increasingly obvious to most enterprises that the personal information and sensitive data they hold is an extremely valuable commodity. Whether its personally identifiable information (PII), private health information (PHI), financial data, contract information, research and trade secrets, intellectual property or contract data (and this list could go on and on), this kind of information has become a new kind of "currency" – and some have even called personal information the new "oil".

However, shared inappropriately – whether by accident or breach – the disclosure of sensitive data can have dramatic financial impacts on an organisation and erode consumer trust. Companies may be subject not only to regulatory fines, censure and potential civil/criminal liability, but also may end up with government auditors reviewing their data protection, privacy and security practices for decades to come.

Also, a recent study by Forrester Research found that the highest percentage of data breaches (approximately 38%) are caused by employees simply making mistakes. The good news here is that this should be highly preventable.

This is all the more prevalent in Australia, as the revised Privacy Amendment Act will come into effect this March. Timothy Pilgrim, the Australian Privacy Commissioner, will have more power at his disposal to enforce the 13 Privacy Principles he and his team will be mandating.

With all of these changes coming quickly, it's no surprise that public and private organisations have been addressing the new Privacy Amendment Act with great enthusiasm, as the intention is to better protect Australians – and those whose data is stored in Australia – from appropriate disclosure. Wondering how you can stem the tide and ensure you're meeting the revisions in the Privacy Amendment Act? Here are 10 tips for improving your privacy and data protection programs you can start implementing today.

Know thy business – Take the time to understand what kinds of data your business handles and uses as well as how your co-workers are using your internal systems on a day-to-day basis. Understanding a "day in the life" of your colleagues will help you determine why and how they need to handle this protected data in the course of their daily work. The time you invest in understanding their requirements will pay off in spades as you will be able to craft solutions that meet their specific needs while ensuring compliance with regulatory obligations.

What are your "Crown Jewels"? – What kinds of data are you trying to protect? Many companies worry about "dark data" existing across their different communication gateways (be it file shares, SharePoint, social systems, and other enterprise collaboration networks) and enterprise systems. Understanding what and where this data is – and properly classifying it – will allow you to set the appropriate levels of protection in place. For example, many com-



panies apply their security protocols in broad terms, using the same security procedures for everything. However, do you really need to put the same security protocols around protecting pictures from your company picnic as you do towards protecting your customers' credit card information?

Set enforceable policies – Your legal office and the compliance team are tasked with understanding your statutory and regulatory obligations to ensure your company complies accordingly. However, be sure that any policies you set internally can be measured, monitored, and enforced. Broad statements such as "we do not allow PII data in Microsoft SharePoint", without the ability to enforce this policy or measure its effectiveness, is not a sound data protection strategy. It's like setting a curfew for your teenagers and going away for the weekend. Don't leave your policies to chance or luck.

Make it easier for your end users to do the right thing than the wrong thing – Create policies, rules, and IT controls that are sensible and make it easier for your end users to do their jobs effectively with the systems and controls that you want them to use. Don't set up policies that are so cumbersome and restrictive that your employees are pushed to private cloud options (e.g. Dropbox and Google Docs). Why? At the end of the day, your employees will do what they need to do to get their job done. Help them to make it simple while using the systems you can control.

Build bridges not only walls – Traditional approaches to data security were designed to keep data "inside" your walls and keep intruders out. However, the challenge with that approach is that if you build a ten-foot wall, your adversary can come with an 11-foot ladder. Then, when you come back and build a 12-foot wall, they respond by bringing a 13-foot ladder, and so on. Walls become difficult to sustain and build, particularly when end users are accessing your data anywhere, anytime and from any device. Think about protecting the data itself wherever it resides – use your privacy and data controls to allow your end users to appropriately access data where it lives across these systems.

Trust and verify – Trust your end users to appropriately identify and classify sensitive data they are handling and/or creating, but verify that they are doing so. Using a combined or "layered" approach to data classification can

ensure that the policies, training and tools you are providing are being properly understood and integrated into the day-to-day tasks of your workforce.

Create a pervasive culture of compliance – Many companies conduct annual privacy and security training. However, try to think of ways in which you can build an ever-present sense of privacy and security awareness into your employees' daily activities. This can be done by using automation to help educate your employees by reinforcing "good behaviour" and explaining mistakes as they happen, thereby helping to build in privacy and security by design.

Getting to "yes" – Some IT and Business Professionals working outside of the compliance role believe (fair or not) that privacy is where "IT goes to die" and that security "leads with no". Most of their counterparts in privacy and security would like very much to change that perception. However it's difficult to do so when they are understaffed and often engaged at the end of a project rather than at the beginning. This is not an effective way to build a collaborative team. Instead, it's important for security and privacy officers as well as General Counsel to take the steps we've discussed above to partner with their IT and business colleagues in order to gain the sponsorship and cooperation necessary to successfully implement privacy and data protection initiatives.

Develop a Service Level Agreement ("SLA") with your colleagues in IT and the business – By implementing a standardised and repeatable process with your IT and

business colleagues so that they will engage you as a project begins – rather than when it is waiting for your sign off as the only obstacle to launch – you will be able to help provide advice, guidance and approval at every step of the process. Consider using automation to allow your colleagues to request a privacy impact assessment of the systems they are planning to build and deploy. This way, you can provide them with a reasonable estimate and timeline for completion. Your involvement early on will save them from having to make last-minute design changes or decisions with the clock to launch ticking.

Reality is perception – It's not only your Chief Marketing Officer that needs to be thinking about building your company brand. Chief Privacy Officers and Chief Security Officers need to be able to market their programs as well. People often think of "brakes on cars" as being designed to stop cars or slow them down. But in fact, when cars were first invented, they had no brakes at all, so you had to drive very slowly. When brakes were invented, it allowed cars to go much faster because drivers knew they had a mechanism by which to stop. Work very hard to encourage your IT colleagues and business users to think of privacy and security controls in the same way. Rather than "stopping" the business from doing its job, instead, the proper controls will allow you to realize the full potential of the data you do have – so that you can achieve all of the business objectives you've set out to accomplish.

Dana Simberkoff is Senior Vice President, Risk Management and Compliance, AvePoint Inc.

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OneDrive to rule them all?

By Bill Dawes

The last time I felt this dumb was after installing Windows Vista. On this occasion, many years and software iterations later, I was midway through an Office365 migration gone pear-shaped. The same feelings of regret and powerlessness washed over me as the realisation dawned that the Telstra support guy in Bangalore controlling the mouse wandering aimlessly across my monitor had even less of an idea than I did what was going on.

Eventually, I cut off Mohammed's virtual control of my machine and took to Google to try to find a solution, which as usual was hiding down deep in an on-line Microsoft discussion thread.

So how did I end up in this mess? Well, it began more than a year ago, at Microsoft's TechEd conference on the Gold Coast. Not an event that is typically on the radar for me as it is targeted pretty firmly at developer, developer, developers who cut code in the .Net world.

However the 2013 event was different as it marked the launch of Microsoft's end to end platform neutral cloud strategy for Office. Personally I have been a long term cloud devotee and had migrated my own small business to the Google Apps platform in its very early iteration.

Cloud financials, CRM, email and Google Docs have allowed me the freedom to run pretty much my entire business in a browser. Of course, a small publisher like myself does not have the myriad of legacy apps and databases that keep the typical large enterprise or government user stuck on the server. Even Adobe has come to the party with Creative Cloud. So essential apps like Photoshop and InDesign are only a quick download away if ever needed.

So all's good with the cloud. But in 2013 I became increasingly frustrated with a couple of aspects of Google Apps.

This was firstly due to the clash between my personal and business Google Accounts. I like to use my personal gmail address to keep in touch with friends and relatives, and the idm.net.au address for work. As I live in the browser rather than using Outlook or Thunderbird for email, there is the requirement to be logged in to enable browser sync. I grew sick of trying to figure out which user I was logged into the Chrome Browser as.

You can get around this by having a separate incognito browser open to use when logged in with your personal address, but that is clumsy and painful.

Then there is Google's ongoing push to have everything linked to a Google+ ID. Sorry Google but I have a limited amount of time to pay attention to social media so I keep a fairly strict regime. Facebook for friends and family and LinkedIn for business. I now there's a whole world of other stuff out there, Tumblr, Pinterest, Snapchat and God know what else but sorry life's too short.

Also, trying to get people to review or collaborate on documents via Google Drive is just not practical. The world still revolves around Microsoft Word.

Yes, I could have just kept everything in Word format and

used Google Drive as a simple filestore, but that approach means you are tied to desktop applications. Office365 offers the potential to leverage Office Web apps when on a foreign PC or tablet and keep your same workflow, although as I was to learn it is still very limited in functionality. My plan was to move everything work-related to Office365 so I could have a happy work/life separation.

I waited until a quiet time in January to make the shift and lined up someone to help me with the email and drive migration, in particular the backend stuff like DNS changes. As a single user it was not going to be that difficult, and it presented the opportunity to tidy up a lot of redundant email folders.

I got my Gmail mailbox down to under 10GB and archived a lot of stuff from Google Drive onto my server to get online storage down to 2GB.

Migrating the mail was pretty simple although uploading from Google Drive to SkyDrive Pro turned out to be more problematic.

During the process of configuring "idm.net.au" on the new Telstra Office365 account, my ID got renamed which unfortunately triggered a bug that made SkyDrive completely inaccessible on the server (all browsers would crash repeatedly). We had to set up a whole new server to work around the problem!

I had wanted to use Azure as a staging server to keep in the Microsoft world but their pricing models are so opaque it was a much simpler job to spin up a server in Amazon.

SkyDrive sync

In the end, the synchronisation tool for SkyDrive was too flaky to complete the job. There were about 500 files which had to be tracked down through a hand-comparison of file lists in directories and copied across. SkyDrive Pro places a few extra restrictions on file names (e.g. no "#", "...") and these had to be manually corrected as well. Also filenames longer than 50 characters are truncated

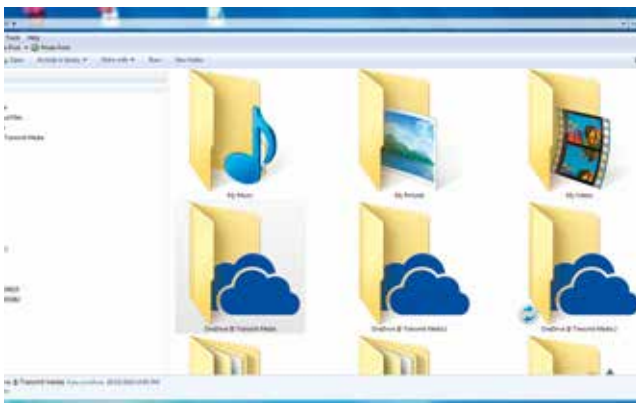
If you are planning to migrate a bunch of users I am sure you will be looking at dedicated tools such as Metalogix Content Matrix to make the job easier. (I only found out later they offer a free single user version for up to 25GB!).

Then I came to the job of syncing my SkyDrive Pro content to my Windows 7 desktop.

Conscious of the fact that I wanted to make a clean start, I uninstalled



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An Office365 identity crisis! I eventually got OneDrive synced up to but only after it had created three separate folders on my PC.

my present Office 2013 installation and downloaded one of the five versions available with my Office365 account. After signing into Outlook 2013 with my Office365 ID my mail synced up OK, but SkyDrive went bananas. In the end I discovered that Outlook had dug up a live.com.au ID from my Windows Credentials and I was mistakenly logged into Office with that ID. This meant that instead of syncing my SkyDrive Pro content from Office365 it instead decided to sync up to my personal SkyDrive folder.

Office Web Apps

While I was sorting out this mess, I had a stab at working in the Web Apps to see how that would go. Unfortunately the browser versions of Word and Outlook are short of a lot of features available in Google Apps. For instance it is not possible to save a Webmail attachment to SkyDrive Pro and Word Track Changes doesn't work on the Web Apps yet. Also Tasks don't show up in the Outlook Web App. The lack of functionality of the cutback Office Web Apps perhaps explains the poor uptake of the Surface tablets running Windows RT.

Eventually with the help of a couple of friendly guys in Bangalore we figured out the Credentials problem and got SkyDrive Pro synced up. I have to say that Telstra's Indian support network is very responsive and until my encounter with the aforementioned Mohammed all the guys I interacted with were very knowledgeable and helpful (and they also like to talk cricket!)

The Telstra support guys admitted that conflicts between SkyDrive and SkyDrive Pro are a common headache; al-

though it is haphazard, in many instances they will coexist happily.

Also, even if you have Office365 installed and SkyDrive Pro icon shows up in program group, you still need to download and install a separate SkyDrive Pro application.

SkyDrive Pro is very touchy about file and folder names. Once it gets spooked it's hard to get things working again and once files are in Microsoft Office Upload Centre it's a nightmare to repair.

After sorting out the credentials problem I had things running pretty smoothly for a couple of weeks. Although every now and then SkyDrive Pro would have sync problems, which could usually be fixed with the typical Windows catchall remedy, i.e. a system reboot.

However I ended up with seven Word files that stubbornly refused to sync. There was no issue with their filenames so I contacted Telstra support and that's how I ended up on the line with Mohammed.

Unlike all my previous calls to Telstra, this fellow was not interested in taking cricket and put the phone on hold while he attempted to get things working. I had to sit there quietly as I watched him do his stuff. His first step was to download and install an updated version of Groove.

Microsoft has something of an identity crisis when it comes to SkyDrive Pro, which is actually SharePoint and is now known as OneDrive although underneath it all is actually a long-time product known as Groove.

With Groove updated, I watched Mohammed's mouse pointer wander aimlessly across the screen until it became apparent he had no idea what to do next.

When it looked like he was about to stop syncing my local drive which would have deleted all my most recent update content I cut the connection and took over myself.

I dug up some advice on how to flush out some local SharePoint Workspace files and Office identities. Accompanied by a couple of system reboots it eventually synced up although only after setting up three different IDs for my OneDrive account.

Which is about when I decided to leave OneDrive alone for a while. I will stick with my network file share for a little bit, at least until OneDrive settles into its new skin. As I learned long ago with that disastrous Vista install, it never pays to be a Microsoft early adopter!

Is there life after InfoPath?

By James Milne

With the recent announcement from Microsoft that InfoPath has been scheduled for retirement an anxious debate has broken out about what life is going to be like after InfoPath.

The initial reaction for many organisations is to start worrying that they may have chosen the wrong electronic forms strategy. There may be some concerns about how quickly a new forms technology can be deployed to replace the many millions of InfoPath forms being used throughout the organisation.

But, after the dust has settled from the initial reaction to Microsoft's announcement, many have realised that there is still plenty of time to review the myriad of alternative options available in this space. After all, the Microsoft Support Life cycle will provide mainstream support until 2018 and extended support until 2023.

The available technical strategies for future electronic forms fall into two categories. The first category, offering the simplest migration path, is the "in-place migration" of existing forms to a new supported platform. The second category, the "rip and replace" strategy, involves removing existing InfoPath forms, and potentially workflows as well, and replacing them with a third-party solution. This second option is obviously going to be more expensive due to the effort and costs associated with purchasing additional products and redesigning and deploying existing forms and workflows.

The strategy selected will primarily depend on the current state of workflows in an organisation. If the organisation's forms and workflows support its business processes very well then the "in-place migration" path is likely going to be the most suitable strategy. However if a large majority of the forms and workflows have descended into a state of disrepair then the "rip and replace" approach may be more effective because it provides the opportunity to redesign the forms and workflow, bringing them back into alignment with business processes.

There are a number of serious contenders that are offering technical solutions now or in the near future to assist organisations with this transition.

Microsoft has stated that more details about a new product offering will be revealed at the upcoming SharePoint Conference in Las Vegas in early March.

This new product will add to the other forms options already on offer by Microsoft such as LightSwitch, Access Services 2013 and .Net Web Forms. It is hoped that the Microsoft announcement will include guidance and direction around the migration path from InfoPath to the new product.

While we wait for this announcement, there are other third-party options which can also be considered:

FormsQuo

The team at Qdabra.com is working up a matrix of migration options based on common customer scenarios. They will also provide their own open source solution called

FormsViewer, which is an app that renders and edits InfoPath forms "in place". This solution will be available for simple forms in April and they have committed to continue to add to the form features over the next few years. This solution provides a simple "in place" migration strategy allowing organisations to continue to use their existing InfoPath templates without modification.

Formotus

Formotus provides support to extend InfoPath to mobile devices, such as Apple iPhones and iPads, and is ideal for enhancing business processes with offline forms. In the near future they will be releasing a Windows 8 app that will extend offline forms to the Windows Platform. Formotus provides a per user pricing model that becomes cheaper as more users are licensed.

ServBus' InfoBus

ServBus provides a product called InfoBus, a reasonably priced add-on to SharePoint, which replaces the functionality of form services. This "in-place" solution allows existing InfoPath forms to be used, viewed and edited and new forms to be created without needing to change the original InfoPath form.

Nintex Forms and Workflow

The Nintex Suite of products provide a comprehensive electronic forms and workflow solution which includes a great mobility and integration story. The Nintex Suite of products have versions for on-premise and Office365 deployments. Nintex is well known for their Nintex Workflow product which provides a drag-and-drop browser-based solution for creating workflows within the SharePoint environment. Continuing the theme of browser based designers, Nintex has released Nintex Forms which offers a simple drag-and-drop interface for creating online forms. Nintex also provides Nintex Live which extends forms out into the cloud so external stakeholders, such as customers or vendors, can complete a form without access into an organisation's internal systems.

Nintex Mobile provides support for mobile devices so forms can be used offline on Windows and Apple devices. Android devices will be added in the near future. The enterprise integration story from Nintex complements Microsoft strategy, as Nintex can integrate with ActiveDirectory, Project Server, CRM, BizTalk and Web Services. If your organisation has a strong deployment of Microsoft technologies then Nintex Enterprise edition would be worth looking into.

K2 Forms, BlackPoint and BlackPearl

K2 is the 800 pound gorilla in this space as their product offering extends past simple forms and workflows through to reporting and Enterprise Services Buses. K2 has two entry level products in the form of their K2 Forms offering, which is very similar to Nintex Forms, and a lightweight browser-based workflow designer called K2 BlackPoint.

The strategy selected will primarily depend on the current state of workflows in an organisation.

K2 also offers a flagship product called K2 BlackPearl built on its own workflow engine so that it can operate without SharePoint. This might be of interest if an organisation is looking to extract workflows from SharePoint. To provide enterprise integration with line of business applications, K2 offers an Enterprise Services Bus (ESB) and a number of connectors for integrating corporate apps, such as CRM and SAP.

Take time to take stock

Very rarely does an opportunity come along that allows an organisation the time to review their electronic forms and workflow strategy from a holistic perspective. Now is the perfect time to take stock of your organisation's current business processes and determine if existing electronic forms and workflows are still supporting these processes.

Here are a few questions to help get you started on this journey:

1. What forms and workflows do you currently have?

With the secondment and workforce turnover, many organisations have lost track of what forms and workflows have been deployed in their organisation. Now is a great time to do a form and workflow audit. This should be a relatively simple process of going through your intranet and identifying any InfoPath forms and workflows that have been deployed.

2. What forms and workflows are still in use and how important are they?

Once you have an idea of what forms and workflows have been deployed, revisit each form to confirm that it is still relevant to the business. There is no point in migrating forms and workflows if no one is using them. This provides the opportunity for cost savings as reducing the number of forms and workflows ultimately reduces migration effort. Next prioritise which forms are most important to the business. Which forms are critical to the day to day op-

eration of business and which forms are just nice to have? Categorising in this manner will determine the order in which forms and workflows should be migrated, a step that is integral to the success of a migration project.

3a. Who owns these forms and workflows?

Take steps to identify the business owners of these forms and workflows. In many organisations IT may have created and deployed the forms and workflows but that doesn't mean they are the owners.

The IT department simply own the technology or the platform that supports the forms and workflows. Electronic forms and workflows need to be owned by the business users who have control over the processes and can define the steps and tasks that need to be completed to achieve the appropriate business outcomes.

3b. Are the business owners still here?

Over time many of the business process owners have moved to other positions or may have even left the organisation, and the corporate knowledge of why specific business logic was used has been lost. Now is a great time to work with current business process owners to understand what is working and what, if any, changes need to be made.

4. Governance

Take the time to revisit your organisation's forms and workflow operational governance. Do you have a method for regularly reviewing forms and workflows to check they reflect and support business processes?

How do you track what forms exist, where they are located, the purpose, and the business owner?

This information is essential for migration and future ongoing management.

Some organisations go to the extreme and integrate their forms into ITIL Services Catalogs while some organisations go for simpler strategies such as using a form register or form directory.



James Milne is a Microsoft MVP (Most Valued Professional) and the founder and director of Myriad Technologies where he consults on large scale portal deployments and publicly evangelises SharePoint within the community. Contact email: info@myriadtech.com.au



The advertisement banner features a blue background with white clouds and yellow arrows. On the left, there are icons of a yellow folder, a blue square, and a white cube. In the center, a yellow speech bubble contains the text "100% SHAREPOINT OFFICE 365 READY". To the right, a white cloud contains the text "...making records management possible". The RecordPoint logo is in the bottom right corner. At the bottom, a white banner contains the text "We've been managing the cloud for ages. recordpoint.com.au".

When an insurer thinks EDMS

By David Fogarty

**"What do you mean you've lost my medical reports
..... #%@\$."**

This was an all too common place complaint from office staff at AFA, a niche Insurance Underwriter of income protection policies for high risk policy holders. If you think about it, operating a manual filing system, it only takes one document to be misfiled and it is gone, resulting in everything from risk management challenges to negative impacts on revenue.

While AFA coped as well as they could by throwing resources at the manual process it was not a modern or scalable solution and something needed to change. So we embarked on a scanning solution review project. Being novices to the soft copy file world, we thought scan on demand (SOD) was the answer.

SOD would have improved the paper issue but it was not the whole answer, due to the overwhelming volume of paper that had to be processed - on average some 90,000 new documents per month. We needed a long term solution, something that would grow with the business, provide flexible licensing and finally provide return on investment.

After many presentations from differing providers we settled on Laserfiche, and the reasons were simple. They were able to demonstrate how it would work within the AFA operation. Secondly it was easy for the end user. Our business had mixed ages and varying computer skills - therefore this was crucial in getting acceptance once implemented.

The implementation process was straight forward. A decision was made to commence imaging on a start date and send all physical paper files to archiving. If we required a file from storage, the facility had direct access via a VPN to image any legacy files directly into the database upon request. No couriers, no delays. We took this approach because a large number of the files would never need to be reviewed, therefore scan when needed was ideal. We would not be adding to the storage facility and once imaged from storage we would then securely destroy. This resulted in a two-fold cost reduction - the storage costs and unnecessary imaging of redundant files.

Cultural Change

Before the project commenced we assumed the main challenges would be IT/Software related, but instead they were in getting the all users to embrace the paperless change.

I believe, for any organization who hasn't used an EDMS before it represents biggest implementation challenge.

At AFA we overcame these challenges but not by being "heavy-handed", instead focusing on the many benefits. We worked with our staff to see how the software would support their roles and take away a lot of the unnecessary and frustrating manual elements.

Within the Laserfiche software we initially set up some

basic workflows that automatically moved files and documents to mirror the manual processors and procedures already in place.

Laserfiche has full OCR (Optical Content Recognition) which gave us the added assurance that documents can be retrieved by a simple search. It meant we really couldn't not find what we were looking for. The OCR also has the added benefit for the advanced users of automated integration to populate metadata, which can initiate a workflow without the user's involvement.

We then designated our resources to take ownership of these folders, each folder representing a function of the business. The impact this had on the operation was instant. For management, it now became easy to identify where there was a shortage of resources and in some cases excess resources. This resulted in some negative perceptions that "Big Brother" was on the lookout. As there were no longer files sitting in compactuses or on peoples' desks, but all held in a central database, work-

As there were no longer files sitting in compactuses or on peoples' desks, but all held in a central database, workloads were now completely transparent.

loads were now completely transparent. The key to overcoming staff anxiety was to focus on the reason the software was implemented - to support their roles, improve the process and let them focus on more constructive things then trying to locate a file or document.

Our users were quick to see the benefits and started to develop a sense of confidence in their day-to-day roles. Rather than advising a customer they would find the file and call them back (hoping they could find the file) they were instead able to instantly retrieve and discuss the document. Our clients were happier, and so were AFA staff. Redundant conversations with customers over missing documents have now been replaced by constructive discussions related to the organisation and its customers.

Incoming mail is scanned through a designated MFD directly into the software, along with attached metadata, after which a workflow is initiated. Scanning of mail also encouraged staff to communicate electronically with AFA customers. Initially we re-routed incoming faxes to store as an image on our file server, (no printed



David Fogarty is a director of THINK Document Management Contact him at davidf@thinkedms.com.au

faxes) in which the Laserfiche import agent would drop into the Laserfiche software almost immediately. AFA eventually included designated email address within the organisation to re-route emails received to these addresses directly into software.

I worked with AFA for over 10 years and Laserfiche was without doubt the most effective operational solution AFA implemented. It touched and enhanced all areas of the business. It is the backbone of the operation.

Importantly Laserfiche has grown with AFA, from its flexible licensing structure to the ability to integrate metadata with non-Laserfiche software and systems.

The key areas of improvement were;

Risk Management – AFA now has an effective disaster recovery plan. The entire organisation is backed up every minute of the day. The risk of losing any intellectual property belonging to the business is now virtually zero.

Relationships – AFA's customers and distribution of Insurance Brokers now only discuss Insurance. Not frustrating conversations about locating files, sometimes surrounding terminally ill claimants. AFA business retention is hard to measure but no doubt it has significantly improved.

Costs – There has been a significant reduction in operating costs overall. The business has a clear understanding of its workflow and workloads and has captured these costs within the Laserfiche license structure.

People – AFA staff have grown in confidence with the positive impact the software has had on their roles. There has been a significant shift of not having to be on the defensive with customers, but dealing with issues with confidence and the full picture. Performance reviews now have actual data and real information on which to create an accurate picture for the staff and management.

Plus - Reduced paper usage, hardware and ink cartridges has both a positive environmental impact, as well as cost savings ...

Having worked with the Laserfiche software for 6 years I saw first-hand how much positive change it brings to operations. Being so passionate about the limitless possibilities of EDMS, I started my own business – ThinkEDMS. Think EDMS will focus on assisting organisations implement Laserfiche as an EDMS solution. For me it is not just what is "in the box" but what you do with it.

Kodak Alaris battles document storm

Insurance companies, government agencies and healthcare facilities face a constant storm of paper documents that threaten to flood business processes and impede the flow of critical information. In these busy work environments, batches of paper such as insurance claims, vehicle registrations and patient records can be obstacles to productivity. To stem the tide, enterprises need to quickly extract data from paper-based documents and route the information to the right places at the right time to serve customers.

"Many offices and departments still struggle with the 'document storm' – an overwhelming amount of paper that creates workflow bottlenecks," said Tony Barbeau, General Manager, Document Imaging.

"The KODAK i3000 and i4000 Series Scanners are designed to calm this storm. These scanners deliver a lot of power at an affordable price to help office workers focus less on the paper and more on the information it contains."

The KODAK i3000 Series Scanners (http://youtu.be/Ah9_5s_orhg) are compact A3 rotary style desktop scanners capable of scanning multiple document types. The i3000 Series Scanners have increased scanning speeds including the KODAK i3400 now at 90 pages per minute (ppm). Existing i3000 Series Scanner customers can upgrade the speed on their models with a free download from kodakalaris.com/go/i3000series.

Kodak Alaris is adding two new models to the i3000 Series – the KODAK i3250 Scanner and the KODAK i3450 Scanner. Each includes a built-in, book-edge A4 flatbed to allow users to easily scan file folders, book pages, magazines, passports, torn documents and more, while the book-edge scanning feature scans the entire width of book pages with full clarity.

The new KODAK i4200 Plus and KODAK i4600 Plus Scanners are now more powerful - allowing users to achieve consistent throughput at 200 and 300 dpi, in bitonal and color. These scanners combine walk-up ease of use, one touch scanning, comprehensive software capabilities and simplified integration within new or existing document management processes for a complete information management solution.

For inquiries contact Francis Yanga Kodak Alaris Australia francis.yanga@kodak.com



The advertisement banner features a blue background with various social media icons including Facebook 'f' logos, Twitter birds, and YouTube 'y' logos. In the bottom left corner, there is a yellow speech bubble containing the text '100% SHAREPOINT'. The central text reads '...making records management possible' in white, enclosed in a white bracket. The RecordPoint logo is in the bottom right. At the very bottom, a dark blue bar contains the text 'World's first in social records. recordpoint.com.au' in white and yellow.

A new view of workflow

Pieter van Schalkwyk is serious about helping businesses do better at getting process work done. That's the official motto of XMPPro, the company he founded and is now running as CEO. IDM sat down with Pieter to ask what the company is doing to take its own flavour of workflow software and methodology to the world. Initially founded in Sydney, XMPPro now has offices and customers in the US and UK, and has recently opened its US HQ in Dallas.

IDM: Pieter, can you give me a bit of a background to XMPPro and where it started and where it came from.

PvS: XMPPro started off when we realised that workflow systems as we know it, from a classical point of view, didn't address the requirements of where knowledge style processes are going. I've been involved with the workflow market for the last 15 years, and at the end of 2009 we started XMPPro in Sydney as a result of some of the challenges that we saw, and also trying to extend functionality inside ERP based products or financial or business applications. In 2012 Gartner put out a research report to say 80% of work is unstructured, and only 20% is really structured where you know the flow in advance.

The other challenge with those kinds of processes is they're very content-rich, so there's a lot of documentation and information and content associated. You don't know the flow in advance, and they're very collaborative, so people like to discuss things, and as a result of that discussion they have context, and then they can make a decision on who should I send it to, who's the best person to act on it? So Gartner looked at our way that we approached this and said it was a really unique way, and as a result of that they made us a "Cool Vendor" for business process management in 2012. As a result of that we had a lot of enquiries out of the US, which initially as a small Australian business we didn't have the appetite for. Towards the end of 2012 we started approaching the US market and almost 12 months later we've established ourselves there and have now won our first really big contract at the end of 2013.

IDM Can you tell us a bit about that deal?

PvS: It's a really large global industrial company in the Fortune 50 and they manufacture a broad range of high tech products; it's a household name worldwide.

IDM: Do your BPM solutions target any particular environments, whether it's ERP or ECM that people have in place?

PvS: Most processes these days are relying more and more on knowledge style workers and less and less on factory style operations, where the outcome can be chosen from a pretty defined set. With most organisations, these processes are woven into the fabric of how they work. So that means that inherently needs to connect to their financial systems, the ERP systems and their manu-



"What's interesting is that we find a lot of organisations are looking at SharePoint from a content management point of view to become the document repository or the document management component for organisations that don't have this legacy. Organisations with the IBM or EMC legacy solutions tend to stay with them. But those looking for new architecture are leaning towards SharePoint which we surface documents through XMPPro." - Pieter van Schalkwyk

facturing systems, and their content management system. I think a lot of people sometimes forget that content is a key part of any of this process, content and collaboration; those are two areas.

One of the things that we built into this solution as well is the ability to have collaboration, so instead of breaking out into email you can have that collaboration inside the process. It's a great thing. But as part of that you also need to put content into that as well.

So if we can collaborate around it the document can't sit somewhere else; it needs to be there when I look at a current workflow strain or a flow or a case, because we call it "case management." One of the elements of this new BPM is to be able to handle adaptive cases on a case by case basis, so we can adapt it.

All of that have content associated with it; the challenge is most large enterprises already have established content management solutions, so you can't now bring a new thing, say the process has got its own content. You need to integrate that content. So in terms of integration to content management solutions, we support integration to all of the large name vendors.

IDM: Everyone's seen the diagrams that most workflow vendors use showing a sequential flow diagram with different outcomes that flow from different decisions. How do you illustrate XMPPro workflow?

PvS: We look at something like customer onboarding, for example and see it as a container, and inside that container we have a collection of events. In actual fact we find a lot of these are hybrids, so sometimes the first part of the workflow will be structured and we can use the conventional notation because people are used to it. Then it goes into a more collaborative or dynamic process which we represent from a diagrammatic perspective, as a kind of ring fence surrounded by some guard rails.

Dynamic processes doesn't mean uncontrolled, so there's still some business rules that we can put around it to say within this framework or within this bucket or container there are eight or nine or 10 different potential things that someone can do and you don't have a pre-defined

"Most processes these days are relying more and more on knowledge style workers and less and less on factory style operations, where the outcome can be chosen from a pretty defined set."

sequence to it. But you need to provide people with decision support because someone now needs to make a decision on this. So under this current set of circumstances, what is the best next action that you could do?

For that we can look at history and use predictive analytics, we can say, "Over the last 1,000 transactions," or 100, whatever the number is, "these were the actions that were taken and these were the outcomes. So as a result of that we suggest that you do this."

An example of that might be onboarding of a new customer based on where you are in the process. "We suggest that you do a credit check now, but based on your contextual knowledge," I'm a sales guy, I know this, I've been doing, we've been dealing with this customer for a long time, and we will do the credit check a little bit later.

Or we may find it's a new customer and once again I've contextual knowledge as a knowledge worker, I've read something in the paper this morning and as a result of that I want to do the credit check now. So we do provide decision support with suggested routes that people take.

So we don't just leave you to say, "There's 10 options, choose one." We do provide guidance or best next actions, but unlike conventional workflow and BPM systems we don't take the decision for you or for that person.

We just say, "This is what we suggest under this set of circumstances." And you can leverage the experience and skill and knowledge that people have. There are certain areas that you want to reduce that and turn it back into a conventional flow diagram.

IDM: There are some pretty established players in the enterprise BPM market, names like Lombardi acquired by IBM and Pega Systems. How does a small Australian developer hope to compete?

PvS: I think by being innovative in terms of how people could use the solution. If you take any of the conventional large traditional workflow solutions they require a lot of consulting and lot of technical skills that go with it, where with a tool like XMpro it is designed in a more modern fashion where it enables those subject matter experts to a large degree, to be able to build and configure more than code.

Traditional BPM systems require pretty large, big projects staffed over a number of years. Nowadays we find for example, in private banking and in financial services, they can't wait that long for the traditional workflow style tools to go through the whole IT processes.

If you allow some of the flexibility and agility that a tool like XMpro brings, it gives them the opportunity to respond a lot quicker to how the market changes, because they're in very competitive situations for that area of the market that they need to be able to respond a lot quicker.

Also many of those organisations have grown by acquisition and comprise different tools that were developed separately. We have workflow, BPM and adaptive case management woven into the same architecture. You can actually move as your organisation's maturity improves you can go from workflow to BPM to adaptive cases. And something like a customer onboarding for private banking is once again an adaptive case.

On a case by case basis you will change and for that it's the case manager or the relationship manager or someone like that that actually construct that at run time; there's no coding involved in *(Continued on page 27)*

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Records Manager

The best of both worlds

Governance in a 'Cloudy' world'

By Miles Ashcroft, RecordPoint

An increasingly common questions that we hear working in the area of document and records management is "What do we do about the Cloud?" Although most of our customers are deploying SharePoint and RecordPoint in a traditional 'on premises' configuration, increasingly we are being asked about Cloud options.

For all organisations the benefits of moving to the Cloud are compelling. Cost savings implicit in no longer having to maintain infrastructure, being able to focus on core business rather than manage servers or software applications are usually the starting point. Cloud models are also implicitly more agile and flexible, allowing organisations to deploy new services and capabilities quickly and cheaply, scaling up or down quickly as the needs of the business change.

The compelling benefits of Cloud models mean that rather than resist this change, information professionals need to think about models to manage these obligations in this new world. We need to be ready, to ensure we meet our obligations to govern and manage content effectively, no matter where it is stored. In many ways this is a tremendous opportunity that means that the skills and experience of information professionals will be even more valuable due to the increasing complexity of the information landscape. It does mean, however, that the ways we think about content management and the tools we use need to change.

The fundamental issue for an information or records manager is that the data is no longer stored on the organisation's services/infrastructure. This could mean the data is stored offshore and in some cases, you may have no idea where it is stored. Moreover, it could mean that third parties have theoretical access to that content.

This leads to the potential to breach particular legal requirements. These vary between industry sectors – clearly public sector and government agencies have many specific obligations that do not apply to the private sector. It also varies depending on the content – not all content is the same. However, as an example, all organisations in Australia have obligations under state and federal privacy legislation to manage information about people. Storing this data in a Cloud SharePoint environment based in another jurisdiction with different laws could potentially expose an organisation to a breach of their obligations.

For government organisations the management of records is an obligation that requires careful consideration before moving to the Cloud. As another example, for law firms there are issues that relate to discoverability and legal professional privilege that are an impediment to offshoring data.

A number of issues can be solved by focusing on the contract with your Cloud provider. If you need to keep data on shore, deal with a provider who can guarantee this. Ensure that any obligations that you have under legislation or just simply to manage your legal exposure are clearly defined in any contract. If you need to ensure that the data cannot be accessed by anyone without appro-

prate permissions, then look at models that encrypt the content.

However, legislative and legal obligations aside, there is likely to be data that you will never want to store in the Cloud which is less to do with the law but more the appetite of the business, due to the value of the information or the risk to the business if control was lost no matter how strong the encryption or watertight the contract.

Most organisations are likely to end up in a hybrid mode with content on a SharePoint server on premises and some in say Azure or the Office 365 Cloud, at least for the foreseeable future. This is until the legal and regulatory framework and the business culture that exists can catch up what the technology offers. We are seeing a number of our customers who are actively considering a mix of SharePoint in the Cloud (most commonly on Office 365) for day to day documents and on premises for more sensitive content.

For information managers, a more practical issue is simply having the capabilities to manage content in the Cloud. This is going to be a greater longer term challenge than the regulatory challenges. Solving this requires you to rethink your strategy around information management and governance on a number of levels. You need to break apart your information governance structure and think about the process for assessing content that you can take to your SharePoint Cloud and content that will remain within the organisation – how is this decided and by who? Once you have defined these policies and processes how can you implement them effectively and consistently?

Again technology can play a part here. Picking a solution that can manage and apply control to your content no matter where it is stored is going to be critical. At the moment there are very few solutions that offer the ability to manage content in your Cloud and on premises SharePoint environments. Traditional solutions have tended to emphasise the importance of the database or the repository. With the new world of the Cloud content will be stored in many different locations and will need to be managed there rather than brought back to one repository. Pick your technology solution carefully with this Cloud future in mind. The Cloud does add a layer of complexity to the information management landscape. However with the right policies and processes and the right tools to implement these policies information professionals can continue to manage information and record keeping obligations in this brave new 'Cloudy' world.



Miles Ashcroft is a Director at RecordPoint Software where he is responsible for running the pre-sales and partner enablement practice. Contact info@recordpoint.com.au

(Continued from page 25)

setting any of that up. So for organisations to move from traditional workflow to BPM to these more adaptive, for us it's all one thing and the agility and speed at which we can do this.

IDM Over the last two years pretty much every major ECM vendor has bought a workflow vendor so it's obviously integral to them, and yet you're out there marketing independent tool in between the enterprise applications and the ECM vendors. How are you competing with that?

PvS: With the ECM vendors we find that they're all very document flow oriented. The way that they design is in a traditional way where you have to know the flow in advance. If you open up the website you look at the modelling tools that they show you, there's a pre-defined workflow, and that's the mindset of most people when they think about workflow or BPM. And the same with the content.

The reason why ECM vendors are buying this is so that they can create a vehicle for the document components that they have, and documents they want moved around based on pre-defined flow. So in the market at the moment, the ECM vendors tend to move into that system of transaction layer into the organisation, and the workflows that they present are not really designed around, "How do we make the organisation faster, smarter?"

An area that we've created for ourselves is what Gartner calls "intelligent business operations" which is all around embedding analytics inside processes to make smarter decisions faster around operational excellence. So we don't really see any of the ECM vendors competing there; although we do bump into the larger classical workflow vendors

IDM: What are the main business processes that are being targeted by users of your tools?

PvS: We initially thought that it would be related to some processes that are very customer-centric, where the customer will drive the sequence of flow. So if you take something like private customer onboarding in a bank, it's not a simple workflow process; as you go through it the customer will dictate what the next steps are. So we find a lot of the kinds of unstructured processes have been managed around customer-focused processes.

I think the market is changing and one of the areas that we see a lot of growth in and I think where acquisitions and things are going to happen in the future is actually around internet of things.

One of the things that XMpro is really good at is handling interventions from machine-based signals. So once again, the content is slightly different.

An example of that is there's one of the largest challenges in the US at the moment is around the healthcare system is people not using prescribed medicine to the prescription.

As a result of that it's got a massive impact on the healthcare cost. One of the smart devices up there is a smart inhaler, so for people with asthma we can, there's technology built into that machine we can actually monitor where and how often people use it.

What XMpro can do is handle the intervention when we find someone, so we have machine to machine integration as well, so we can listen for devices, whether it's industrial device, medical device or personal device, there's a whole range of devices. And they generate content as well.

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A structured approach to better managing media assets

What is so special about Digital Asset Management (DAM)? IDM asked Dr Sebastian Stein, Cumulus Product Manager at Canto, makers of the widely used Cumulus platform.

IDM: A lot of organisations today have document and content management systems, why do they need a DAM?

SS: DAM and CMS build on each other. A DAM is used to support your people in creating creative files, for example an infographic. On the other hand, the CMS helps you to manage your website or Intranet, where you want to make this infographic available.

So the CMS interfaces with the DAM to get the infographic and put it on the web. At the same time you want to send the infographic in an email newsletter, so your marketing automation system interfaces with the DAM, too. So the DAM is a backend system where you store and manage all those different files. We see this best of breed approach in many projects and we partner with several leading CMS providers to have pre-configured solutions for it.

IDM: DAM was once the province largely of media and publishing companies, and then inside marketing departments in large enterprises. Has the need for photos and video management systems spread wider?

SS: Absolutely! If you remember the web from the early days, it was mostly text. Today, we see a lot of visuals and videos. Just take a look at a typical news site with all those slide shows, infographics, and video snippets.

But now of course the old workflows designed around managing text don't scale anymore. You need to manage the creative pipeline, too, but without destroying creativity!

IDM: What is the main obstacle to centralising management of managing ever growing libraries of rich content – such as photos, images, videos, audio files, documents, presentations and more? Is it categorisation and labelling?

SS: Establishing the necessary processes is key. Before you can start categorising or labelling, you first need to agree upon a taxonomy. So you need to involve stakeholders and make sure it gets updated. You have to establish the necessary processes to keep your initiative alive and internalise it in the organisation. So as always, there is no shortcut, but you have to do your duties as a manager and prepare your organisation for it.

IDM: Most organisations these days have SharePoint and Microsoft actually promotes the new release of SharePoint 2013 as having a "special kind of document library, an asset library to handle media files — such as image, audio, and video files — that is shared with other users." Is this not enough?

SS: It might be enough and if it does the job, stick to it! No need to introduce yet another system. However, many companies are not pure Microsoft or Adobe shops. Usually, you have many different file formats and systems involved and you need an integration technology between them. So here DAM is a key player.

IDM: What are the most significant improvements in this latest update to Cumulus 9?

SS: For our long-term customers, we increased the performance in our existing tool chain so that they can keep on growing their million plus file collections. New users will most likely appreciate our new web client featuring a modern easy to use web UI. Ease-of-use really helps to get users committed to your DAM initiative. They will imme-

diately feel comfortable with the new UI as it looks and behaves like a consumer tool.

IDM: What has been done with Cumulus 9 to introduce video management capabilities?

SS: Everyone wants videos, but when you look into managing video content, you see that it is a very complex problem. With the latest release, Cumulus takes care of managing this complexity. You just upload your video once and Cumulus converts it into all the different formats. You get an embed code, which you can place in your website or newsletter and our streaming cloud will take care of delivering the video to your users.

IDM: Any system that eases the job of image and data managers has to be embraced by users. What are you doing to make it easier for users to assist with essential tasks such as applying metadata?

SS: In the past, DAM was a topic for metadata experts. But with our new web client for Cumulus, you can involve many more people in your organisation without having to train them extensively. For example, if you're on the road and want to discuss some imagery with your peer, just get your iPad and start browsing for it. No need to install a vendor-specific mobile app with thousands of configuration options.

IDM: There is a lot more to digital asset management than classification, tasks such as workflows, digital rights management and tracking. How have you addressed these areas in your latest release of Cumulus?

SS: DRM and license management is still evolving. There is no accepted standard yet for license definition. So we keep on solving that on a project basis using our highly configurable system. For instance, we interviewed Monterey Bay Aquarium in a webinar where they showed exactly how they manage digital rights with Cumulus. Workflows are done in Cumulus by our RoboFlow component, which got a new simple admin UI. You build up your custom workflows from a list of possible actions.

IDM: Can you explain Canto's vision of delivering "consumerised" digital asset management software for the enterprise?

SS: In a nutshell, it means learning from what works for millions of users and applying the lessons to DAM. If I install a new app on my smartphone or sign-up for a new web service, I don't read the manual. I might watch a short intro video, but in general I expect I can use it immediately without training. That's where we're trying to move DAM. Imagine you need to share rich media files with project collaborators and there is this Cumulus web tool you should use for it. You just sign-in and get the job done without having to attend a long training. This is only possible if you feel immediately at home when you login and find your way around the tool easily.



Dr. Sebastian Stein is Cumulus product manager at Canto. He holds a doctoral degree in computer science and has worked in different positions in the enterprise software business for almost 10 years.

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

With document imaging, document management, business process management, records management and mobile applications baked into the core system architecture, Laserfiche makes it possible for organizations to standardize on a single ECM system. Join regular webinars online to learn how 32,000 organisations use Laserfiche to improve customer service and automate business processes to achieve measurable results (Contract Management, Invoice Processing, HR Onboarding, and more).

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

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

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

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

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

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

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

RecordPoint Software

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RecordPoint

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

By adding capability to the Microsoft SharePoint platform, RecordPoint:

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

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

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

Objective Corporation

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Objective

The Objective ECM solution has been engineered to meet the

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

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

Kapish

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At Kapish we are passionate about all things TRIM. As a HP Software Gold Business Partner, we aim to provide our customers with the best software, services and support for all versions of the Electronic Document and Records Management System, HP TRIM.

We understand that it can sometimes be an all too common problem where document and records management is seen as being just too difficult.

To help improve this perception we offer easy to use business solutions to overcome the everyday challenges of information governance using HP TRIM.

As a software and services company focused exclusively on HP TRIM, we work with our customers to improve their everyday use and experience with the system.

Designed to bridge the gap between users and technology, our software solutions are easily integrated into existing systems or implemented as new solutions.

Quite simply, our products for HP TRIM make recordkeeping a breeze.

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Information Proficiency and Sigma Data are at the forefront of Information Management Services and Streamlining Business Processes.

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

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

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



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Fujitsu, as the world's leading document scanner company, with top market share in North America, Europe and Japan for both Desktop and Workgroup scanners, offers compatibility with over 200 different document imaging applications.

The result is state of the art image solutions from innovative portable units all the way to large centralised production environments.

Fujitsu document scanners are renowned for their performance, remarkable image quality, fail-safe paper handling and Fujitsu's legendary reliability.

New innovations include:

- Overhead contactless scanning of fragile documents, thick books and oversized items;
- Ability to input and sort multiple small documents, business cards, etc., just by laying them on the desktop;
- Ultra-sonic and patented ISOP paper sensing technology that prevents batched document damage;
- Mixed batch scanning and automatic paper skew correction capabilities.

acrodata

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acrodata is a multi-award winning records and information management (RIM) solutions provider helping organisations in government, professional services and corporate sectors to better store, access, share and protect their critical records and information.

Offering more than just software solutions, **acrodata** provides businesses with a suite of RIM services, catering for all records management needs.

Our three main services divisions are; document digitisation services, such as records scanning, digital conversion and digital printing; specialist RIM consulting on matters such as digital strategy, digital workflow and compliance with statutory obligations and; sourcing and implementing electronic document and records management systems (EDRMS) and enterprise content management systems (ECMS).

Through this combination of solutions **acrodata** offers one of the most comprehensive and tailored records management services on the market.

Whether your organisation operates with a fully digitised records system, a completely hard copy system or a hybrid of the two, we can help you streamline workflow and maximise efficiencies.

Glentworth Consulting

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

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

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

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

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

Glentworth has a particularly strong track record across industry sectors and its consultants have proven capability solving the most complex of data and information problems. It also specialises in disaster management, public safety and security and has worked across Australia in these vital areas.

Glentworth is known as an ethical business with a strong sense of social responsibility, which it demonstrates tangibly and consistently.

The company is Australian-owned; and its staff are personally and passionately committed to delivering quality outcomes to clients.

Workflow boost for Objective ECM 8.2

Objective Corporation has announced the latest release of its Enterprise Content Management Platform - Objective ECM 8.2.

Objective ECM 8.2 can be deployed on-premise, on a customer's chosen community or private cloud and is available as Software-as-a-Service in a secure public cloud. Objective ECM 8.2 is integrated with Objective's other SaaS offerings, Objective Connect the secure information and process management platform and Objective Online the collaborative authoring, stakeholder and committee management platform.

The new capabilities of Objective ECM 8.2 include:

- New Workflow and automation capabilities allow office and mobile users to act on Workflow tasks through actionable emails
- Enhancements designed to increase adoption include mobility options for tablets and deeper document management in the browser
- To meet changing information governance requirements, there are changes to disposal authorities and the implementation of the new Australian Protective Security Classification system.

<http://www.objective.com>

cleanDocs Desktop stops data leaks

DocsCorp has announced the release of its new metadata management software - cleanDocs Desktop - which enables organisations to better protect themselves and their clients from accidental information and metadata leaks.

cleanDocs can remove more than 100 metadata types from MS Word, Excel, PowerPoint and PDF documents. In addition, IT Administrators can specify custom property manipulations. For extra security, cleanDocs can convert documents to PDF using DocsCorp's new PDF technology.

It does not require access to the authoring application, instead it works on the binary level to analyse and clean documents speeding up the process also via multi-threaded processing.

IT Administrators can establish enterprise-wide metadata policies to ensure all documents are cleansed of metadata. Alternatively, users or nominated users can be allowed to modify cleaning options at the point of sending based on the recipient's trust level to provide a more flexible approach rather than a "one-size-fits-all" solution.

Mobile email is on the rise and so are the dangers of metadata leaks as people increasingly use smartphones and tablets. A new cleanDocs Mobile module, due for release in April, 2014, will only cleans documents that come from mobile devices (iOS, Android, Blackberry, and Windows Phone) or through Outlook Web Access.

cleanDocs Desktop integrates with Outlook and provides the user with a rich experience at the point of sending. cleanDocs Desktop and cleanDocs Mobile work in unison to ensure documents are only cleaned once. They can be deployed independently or together for a more comprehensive metadata management solution

A trial version is available at <http://www.docscorp.com/en/about-us/request-cleandocs-trial/>

FineReader 12 speeds up recognition

ABBYY has announced FineReader 12, the newest version of its Optical Character Recognition (OCR) and document conversion software application. FineReader 12 delivers enhanced performance for many processes and functions, including faster document conversion, the ability to quickly open documents of any length while OCR processing runs in the background, and instant recognition of a text or table area selected on the page.

In addition, FineReader 12 offers enhanced accuracy for OCR on business documents and with Asian languages, as well as new image enhancement tools helping users to produce digital copies of documents with even higher visual quality than the originals.

FineReader 12 delivers intuitive tools for scanning documents and converting images of documents into editable and searchable electronic formats such as Microsoft Word, Excel, PDF, TXT, popular e-book formats and more.

ABBYY Adaptive Document Recognition Technology allows FineReader to "understand" a document's logical structure, re-creating even large, complex documents with their native formatting attributes (e.g. headers, footers, page numbering, table of contents, etc.) across all pages.

Background OCR for Maximum Efficiency — FineReader 12 offers an innovative document conversion approach that enables users to open, view and start working with a document of any size immediately while it continues to be processed in the background. Unlike traditional approaches, which require a document be fully recognized before it is available for other actions, FineReader 12's background OCR saves considerable time by providing access to all document pages at once. Additionally, FineReader 12 improves OCR processing speed up to 15%.

Easy Extraction of Data and Text Quotation — With its optimised interface and newly added controls, FineReader 12 enables users to easily copy a table or formatted text from any selected area without the need to recognize the entire document.

Improved Accuracy on Business Documents — FineReader 12 includes a new tool for removing colour stamps and pen marks on scanned or photographed images, providing better recognition quality and improving the appearance of business documents. It also offers up to 30 percent more accurate retention of charts and graphs and some other elements typical for business documents.

Seamless Conversion of Tables — FineReader 12 improves table conversion by up to 40 percent, saving engineers, financial professionals or other specialists significant time and effort when working with numerical data.

Visual Quality Enhancement for Scans, Photos and PDF Documents — Improved ABBYY Camera OCR enables users to turn photos of documents into scanner-quality images, and offers new photo pre-processing functions such as auto crop of multiple images and whitening of the original document's background.

<http://finereader.abbyy.com>

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