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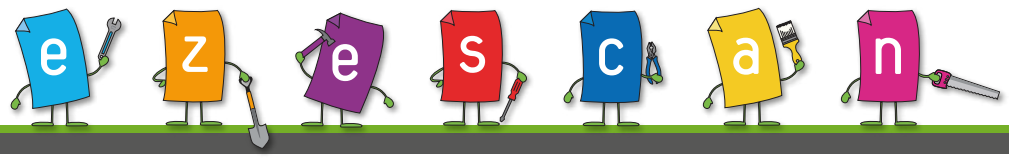


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## Information is the world's new economic resource: David Fricker

Information is the economic resource of the 21st century says David Fricker, who has taken up his role as President of the International Council on Archives (ICA) in Paris. As the first Australian elected to the prestigious position, Mr Fricker will also continue in his role as Director-General of the National Archives of Australia during his four-year term as head of ICA.

'The vast amount of information that we humans now make, keep, find and use, is what differentiates this century from other periods of our history,' he said. 'Information, and our control over it, defines the ability of governments to work with transparency, integrity and security; it also defines the extent to which individuals enjoy privacy, access to justice and prosperity.

'But, just as for any other valuable resource, information must be properly understood and carefully managed to completely achieve its full economic benefit.

'In a hyper-connected world that is flooded with data, it is essential to have access to reliable information that is authentic, complete, usable and accessible. In this, the role of archives and archival institutions is vital.

'Archivists have a deep understanding of information. We understand its vulnerabilities, its sensitivities and of course its long term value. We have a lot to offer to governments, business and to the broader community as they wrestle with the issues of the modern world and I know our contributions will be welcomed and appreciated.'

Mr Fricker believes too much discussion on Information policy is focused on technology alone, when aiming to meet the challenges of complex issues such as digitisation, big data and the globalised digital economy – as well as 'infopolitical' issues such as open government, national security, the right to information and individual privacy.

'While technology is of course the essential enabler, it is the data that matters,' he said. 'Technology must advance and be constantly replaced and refreshed, but archives must endure forever. The preservation of the world's digital heritage will require a sustained, coordinated effort and partnerships with many organisations across the world. The ICA must play its part.'

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PO Box 392, Paddington NSW 2021, Australia

Telephone: +61 (2) 9043 2943

Fax: +61 (2) 8212 8985

email: idm@idm.net.au

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## PCEHR privacy breached twice in 12 mths

The Office of the Information Commissioner found two breaches of Australia's Personally Controlled Electronic Health Record (PCEHR) in the past 12 months. Inits eHealth Annual Report 2013–14, the OAIC reports it received two mandatory data breach notifications under s 75 of the PCEHR Act.

"The OAIC was advised by the System Operator of the first data breach in December 2013. This data breach involved a technical change made to the system that meant that healthcare providers could view consumers' personal health notes. Investigations by the System Operator identified the cause and a technical fix was put in place to prevent further access. The OAIC reviewed the information provided by the System Operator in relation to the breach and determined that the response was appropriate and that no further action was required.

"The System Operator notified the OAIC of the second data breach in May 2014. This breach involved consumers logging into their MyGov account and using their identify verification code (IVC) to access their own PCEHR and link their PCEHR to their MyGov account. In some instances they also accidentally set up access to another consumer's PCEHR while still logged into their own MyGov account, linking that second consumer's PCEHR to their own MyGov account. This resulted in the landing page of the first consumer's PCEHR showing two 'Open your eHealth record' buttons, which provided links to open both consumers' PCEHRs. The System Operator advised that containment strategies had been implemented to prevent similar incidents occurring. It should be noted that the cause of the breach was not related to MyGov. The OAIC sought further information from the System Operator about its response to the breach. The OAIC's consideration of the data breach notification and the further information provided by the System Operator was ongoing at 30 June 2014.

The OAIC liaised with Health about other incidents relating to the PCEHR system which did not meet the criteria for mandatory data breach notifications under the PCEHR Act. In one of these incidents, an email containing a consumer's IVC and other personal information was sent to the incorrect email address. The email recipient, however, did not have the other information required to access the consumer's record. The OAIC provided recommendations to the System Operator about how it could reduce the impact of any future incidents of this type. The System Operator advised that it had implemented the OAIC's recommendations. The OAIC also sought legal advice from AGS to clarify the threshold for mandatory notification of data breaches.

## Family Court continues paperless push

The Family Court of Australia has taken its next step towards an electronic court file, adding a new capacity for e-lodgement from November 1. At the 16th National Family Law Conference in Sydney, Chief Justice of the Family Court of Australia, the Hon. Diana Bryant AO announced the Court is fully committed to moving to an Electronic Court File and will replace the current paper-based processes as soon as practicable.

"The first move towards eFiling and the development of eForms was the establishment of the online divorce application form which went live in 2009. Since then, we have introduced eFiling for initiating applications and responses and we are currently working on the latest eForm, the application for consent orders, which will be available from the Commonwealth Courts Portal (CCP) from 1 November 2014.

"The CCP, at www.comcourts.gov.au, is a gateway to the electronic court file and is the platform from where legal practitioners and litigants will eventually conduct all of the business-side of managing a case, including all filing transactions, managing hearing dates, and even communicating – eventually doing away with sending letters via traditional mail," Bryant said.

## Diem Portal tackles accessibility

Information Management and Governance (IMG) specialist, iCognition has released Diem Portal 4.2, which complies with mandatory Federal and State Government requirements to meet the accessibility standard W3C WCAG 2.0 Level AA by 31 December 2014.

"This is an important and timely step for Government organisations with HP TRIM or HP Records Manager", said iCognition Principal Nigel Carruthers-Taylor.

"Accessibility requirements for websites, which include web interfaces for applications such as EDRMS, are mandated under government policy, legislation, and through whole-of- government commitments. Now they have a compliant solution to meet this mandatory deadline".

"The standard that must be complied to is the Word Wide Web Consortium (W3C) Web Content Accessibility Guidelines version 2.0 (WCAG 2.0)", said Carruthers-Taylor, "Even within this, you must comply with Level A and AA. If you fail any one of the requirements, then you fail to meet the standard. We worked with leading industry expert, Lisa Herrod of Inclusive UX, and getting over the line was no easy task.

"But we eventually got there and Lisa was satisfied to issue a statement that the Diem Portal meets each of the W3C WCAG 2.0 A and AA success criteria."

iCognition CEO Joe Mammoliti concluded "we are very excited for our Government clients, because not only will they achieve timely WCAG compliance, but our Diem Portal adds extensive and simple to use discovery, collaboration and sharing capability to HP's proven EDRMS platform, available anywhere on any device, whether in the cloud, mobile or onsite. Diem Portal allows organisations to maximise their investment in HP TRIM/HP Records Manager by providing better user experiences, improving user take-up, reducing training and support costs, and providing mobility and a transition path to the cloud".

## EzeScan launches Web apps

EzeScan has announced the launch of a range of EzeScan Web Apps (EWA) designed for use on a web browser or mobile device to manage hardcopy document and electronic file capture, conversion, processing and routing data directly to a network location or supported EDRMS system.

"The apps are easily accessible to all members of an organisation via their preferred web browser on PC/MAC or mobile device." said Mike Kirkby, Managing Director of EzeScan creator Outback Imaging. "In addition these apps allow the ability to initiate intelligent business processes whilst at the same time ensuring records and information standards are adhered to. This means capturing and profiling of information can expand outside the information and records department giving further efficiencies to an organisation."

There are currently four EzeScan Web Apps available including:

• **EzeScan Barcode Coversheet Generator (BCG)** - With EzeScan's Barcode Coversheet Generator Web App, anyone in an organisation can generate a barcode coversheet with metadata that enables them to scan a document from their MFD directly to the desired location (network/supported EDRMS), in the required output format (e.g. TIF, PDF, JPG), with the correct metadata. Users need only specify a project number, identify a person and select a document type, before printing the barcode coversheet. Barcoding allows them to scan and file documents effortlessly and register them into their backend systems in a highly automated manner. Information and Records Managers can configure unique lookup databases or utilise existing databases for users to select the desired information. Additional custom fields can be configured for users to type additional information such as file name or comments, or select a value from a pull-down menu.

• **EzeScan File Upload Assistant (FUA)** - The EzeScan File Upload Assistant Web App enables anyone in an organisation to select and upload electronic files from a computer or mobile device to the desired location (network/supported EDRMS) with the correct metadata. Information and Records Managers can configure unique lookup databases or utilise existing databases for users to select the desired information required to file their electronic documents. As with the Barcode Coversheet Generator additional custom fields can be configured for users to input custom values.

• **EzeScan File Approvals Assistant (FAA)** - The EzeScan File Approvals Assistant Web App provides a web based approval/validation processing interface for documents such as invoices requiring approval for payment. Users receiving email notification of documents requiring attention can review documents in a standard browser on any device (including smart phones or tablets) and validate, add or change metadata. Now users outside of traditional records environments can assist in document processing.

• **EzeScan Remote Indexing Assistant (RIA)** - The Remote Indexing Assistant Web App application provides a web folder/file based indexing interface that allows remote users to participate in the processing of documents generated by an EzeScan workflow. Simply scan your documents with EzeScan and send those documents to the EWA Web Server. When new files are detected the EWA Server sends automated email notifications to the workflow users. They simply click on the secure URL link in the notification email, view the documents in their web browser, add/modify any metadata and then submit each document to the next stage of processing. The processed files with updated metadata can then be picked up by EzeScan Server or EzeScan PRO and automatically uploaded to a supported EDRM system.

"Each of these four applications are delivered via the EzeScan Web App Server to your favourite web browser enabling them to be run from PCs, Apple Macs and mobile devices like tablets and smartphones." said Mr Kirkby.

*www.ezescan.com.au*

## Kapish adds support for HP RM 8.1

Australian developer and solutions provider Kapish has released a new version of the Windows Explorer interface (Kapish Explorer) for HP TRIM/HP Records Manager. The release of Kapish Explorer 4.3 completes the full set of Kapish products that now deliver full compatibility with HP's latest release of HP Records Manager 8.1.

"We are delighted to have a complete software suite that is compatible with the most up to date technology on the market. We invest a lot of time in developing and maintaining our products to make sure we support the latest versions of HP TRIM and HP Records Manager," said Kapish General Manager Colin Anderson.

"Customer confidence is growing with HP Records Manager 8.1 so it is imperative that we update our product suite and make certain we provide our customers with full support when moving to the new platform."

Mr Anderson went on to say "Kapish customers are able to upgrade to HP Records Manager 8.1 with confidence that they are moving to the most advanced version and, complemented by our updated Kapish Product Suite, can deliver better business outcomes."

The latest release of Kapish Explorer provides new features, enhancements and support for HP Records Manager 8.1.

It allows a more seamless approach to information management, while enforcing all business rules and record keeping requirements. Access HP TRIM / HP RM Trays as top level folders, preview multiple documents at once and drag and drop records to create relationships without launching HP TRIM / HP RM.

*http://kapish.com.au/products/*


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# It's all about the data

**How organisations can apply a data-centric approach to eDiscovery, investigation, cybersecurity, privacy and other enterprise information challenges.**

By Angela Bunting

Although overused and over-hyped, the phrase 'big data' has at its core a promise: with enough data, processing power and intelligence, organisations can yield insight, predict the future, make better decisions and gain a competitive edge.

However, when it comes to unstructured data – human generated information found in emails, documents, photos and other formats – it's typically not about predicting the future, but reacting to a complex event such as litigation, regulatory compliance or a cybersecurity breach. Often, the biggest struggle is not getting enough data but having too much.

Business problems including litigation, investigation, records management, privacy, cybersecurity and storage optimisation all require organisations to ask difficult questions of their unstructured data and receive comprehensive and timely answers. These questions include:

- What is our risk exposure?
- Who did what, when, and can we prove it?
- How did the bad guys get in and what did they steal?
- Are these documents or emails company records?
- Where is our intellectual property?
- Does this data we're storing have business value or does it pose a risk?
- Where do we keep high-risk or high-value data and how can we find out if it escapes?

Providing the answers to these questions, quickly enough to be valuable to the business, is hard work. Unstructured data formats are much harder to search and analyse than databases or simple text. In this context, "big data" is a challenge, not an advantage. This is due to the massive volumes of unstructured data organisations create and store, and the large proportion of this information that is not relevant to the task. To solve these disparate problems, most organisations invest in point solutions such as eDiscovery, forensic investigation, records management and information security applications. IT departments must provide technical and logistical support for many of these tools at considerable cost.

Even though the questions being asked of the data are quite similar, the answers are required by different parts of the business. Under these circumstances, it's difficult to expect a coordinated response. However, the end result is organisations using several different and very expensive hammers to drive the same nail. Although the people in different parts of the business may not realise it, they all face common challenges. These include hard-to-understand data formats, too much data, important data stored inappropriately and multiple tools and point solutions.

## A data-centric approach

A common thread connects litigation, investigation, records management, privacy, cybersecurity and storage optimisation: all require organisations to ask difficult questions of their unstructured data and receive comprehensive and timely answers. By taking a data-centric approach, and using the right technology, organisations can crack open the content of their unstructured data and develop processes and competencies that will reduce costs, improve efficiency and deliver new sources of business value.

**Workflow automation -** eDiscovery and investigation tools are highly complex with large numbers of options for processing data in different ways. Inconsistent handling of evidence sources is risky, especially for matters that could end up in court. Using advanced technology, organisations can formalise processing workflows and settings into a template or series of templates. This means staff members with limited expertise can process data consistently and defensibly.

**Collaboration** - Certain technologies make it possible to provide compartmentalised and secure access to case data for external parties such as lawyers and subject matter experts. It's easy to divide up tasks along whatever lines make sense, including date ranges, custodians, locations, languages or content types. For example, you could pass financial records to a forensic accountant or internet activity records to a technical specialist.

**Sharing the workload -** Choose software that gives you flexibility to share the same case file format across desktop, server and web-based applications. This means that sharing work internally or with external providers at any stage of the discovery or investigation process is as simple as transferring a case file.

**Text and visual analytics -** Use tools with built-in text analytics such as auto-classification, clustering, topic modelling, text summarisation, deduplication and near-duplicate management to search, understand, classify and minimise data sets. Interactive graphical tools including timelines, communication network diagrams, commonality network diagrams and trend, pivot and intersection charts make it easy to slice, dice and visualise data so you can quickly identify trends, locate information of interest and drill down to specifics.

**Living index -** Frequently litigated or investigated organisations use powerful collection and discovery technologies to maintain a regularly updated index of all files and emails. The automated collection technologies conduct scheduled updates, adding only the most recent data to the index. This index is instantly searchable, eliminating the lag between when someone asks a question and when the organisation can start finding the answers.

**Information governance** - The proliferation of data is a major driver of costs in litigation, investigation and many other information-gathering activities. Some organisations are seeking to minimise their storage volumes by eliminating data that is duplicated, trivial, obsolete, past its retention period or even potentially harmful.

Rather than waiting for a trigger event such as a lawsuit or an email migration, some organisations are initiating information governance processes to do this as a matter of course. Such information governance projects very quickly become self-funding through smaller litigation budgets, reduced storage spending and improved risk management. They can also become a source of business value as employees become more effective and organisations leverage the knowledge they have gained from understanding their own data.

Angela Bunting is Director of User Experience at Nuix.

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# 5 Elements to Consider for Paperless Success

By Mia Papanicolaou

**We recently analysed the execution of paperless strategies for a company that was struggling to increase paperless adoption among its clients. They had actioned all the advice provided, so what was the issue? After conducting an analysis we found that there were gaps in the implementation, which led to a below average customer take up of the paperless service.**

Some of the areas we looked at (and you should too):

**1. How are email addresses collected/updated?**

Every channel, medium and outlet you have at your disposal should be used to collect email addresses. Where possible, also verify and update the information already captured. Updating these details is especially important when you're dealing with what is deemed to be old data.

All too often we expect customers to tell us when details have been changed. This doesn't always happen…

Think about updating details when:

A customer calls in to the call centre: Have the agent ask for an email address or verify the email address at the end of every call.

A customer logs into your portal: Execute campaigns that ask them to verify details before they continue.

A customer pays online: If they use a different email address when paying online, ask if you can update the email address on file with the one they've chosen for payment.

A customer visits an office / store: Use this as an opportunity to update or verify details.

**2. How many valid email addresses are on file?**

This may seem like an obvious item to consider. However, many companies (like the one in question) have email addresses on file that they consider to be 'old data', so don't consider using it in a paperless strategy.

Why discard data that a customer has already given you? You should still email this base, maybe not to gain consent right away, but certainly as a way to confirm they still want to hear from you in this medium.

**3. How well do your consent emails perform?**

If you're sending consent emails, are they getting customers to turn off paper? If you have a low percentage uptake (anything in single digits), you should think about redesigning those emails and testing various elements such as subject line, layout, call-to-action placement and appearance. All these elements impact the action or reaction the customer has to the email.

Something else to consider is whether a significant portion of your base is reading your emails on a mobile device. If you're not taking mobile into consideration, this could be a lost opportunity, as badly designed emails will result in a customer deleting the email rather than taking action.

**4. Do you send consent emails on an ad hoc basis?**

Emails aimed to gain paperless consent need to be triggered after an interaction with your company (providing an email address, updating an email address, making a payment online) and thereafter triggered at specific times if no action is received.

Don't assume that a customer doesn't want to go paperless because you emailed them once and they took no action. People are busy and your email may not have been on top of their list on that day. We see take up rates of up to 10% in subsequent triggered campaigns.

**5. How do customers get to know about your paperless service?**

What are you doing to educate your customers about going paperless? The message should be consistent and repeated across all communications and touch points. Don't merely rely on customers visiting your site to see a tiny button that says 'save the environment', or expecting that one email you've sent to do the job.

Include clear messages about going paperless:

On their paper bill with an easy way to enrol

On your website – be loud and clear throughout, not only when they log into the portal

On the payment site / page

When a call centre agent speaks to clients

On social media sites

There are many elements that affect paperless adoption. An idea alone won't help increase customer take up rates. It's how you implement those ideas and whether you test various elements to see what works with your client base that will make the difference.

*Mia Papanicolaou is COO at solutions provider Striata.www.striata.com*

## Secure eForm and eSigning for TFN

Secured Signing, the Australasian provider of customised eForms and the PKI Digital Signature system, has announced the launch of its secure Tax File Number (TFN) apparatus that complies with and meets the Australian Tax Office (ATO) electronic signatures guidelines.

The solution allows companies of any size or industry to change their paper-based TFN data collection into a secure electronic process that gives employees and contractors the flexibility to legally complete and digitally sign TFN forms from anywhere at any time.

Secured Signing's new hallmark enables a company's authorised personnel to instantly invite an employee to complete and sign a branded on-boarding digital package that includes workflow, TFN form , and due date for sign-off. The Secured Signing service then verifies all mandatory fields are filled with no missing information, and progresses to check the validity of the stated TFN number.

To complete the online signing process and to ensure a maximum level of security is achieved, the system sends an SMS Code to the employee's mobile phone that needs to be entered in order to complete the signing process. This two-factor authentication process certifies the user's identity and guarantees the credibility of the signatory's information.

"Secured Signing transforms the previously lengthy, time consuming, compulsory procedure into a secure, simple, fast, and convenient paperless process," says Mike Eyal, Secured Signing's Managing Director.

"The sought-after new implementation combines Secured Signing's secure Personalised X509 PKI Digital Signature technology with the remarkable work of our development team to deliver to our customers and users business flexibility with absolute accuracy in its content and operations."

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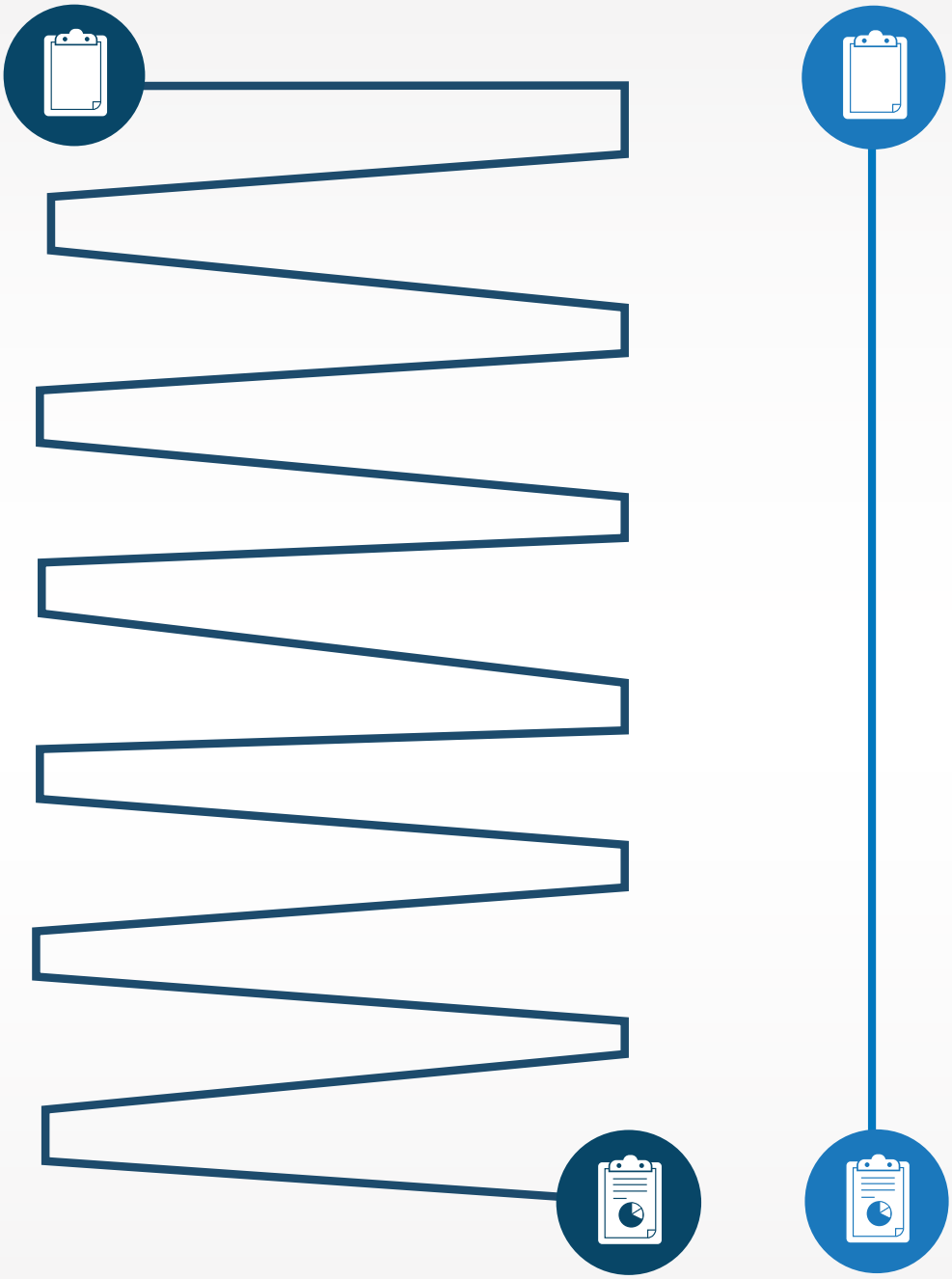

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# Reinventing records management

By Tim O'Grady

**In 2014 what does an operational records management service look like? In the past it was a much easier task to imagine a records management operation. Crusty records officers located in a registry office, a great big compactus with lots of hardcopy files, a mysterious classification scheme, and the magical skill to find that obscure document when the CEO wanted it. We all know that those days are well and truly past, but what has replaced it and what works best in modern organisations?**

CSIRO, the Commonwealth Scientific and Industrial Research Organisation, is Australia's national science agency and one of the largest and most diverse research agencies in the world. In 2011 CSIRO realised that modern work practices and records management demands required a rethink of our approach to Records Management and how records management services were delivered within a large national organisation.

Since 2012 records management operations have been completely re-engineered. Using an evidence based approach, supported by standards, a new model for records management service delivery has been developed and implemented, allowing limited records management resources to have the greatest impact for the organisation.

Until recently CSIRO lacked a single corporate records management service. Records Management operations were largely devolved and associated with specific business units and divisions. There was a loose coalition within the records management community in CSIRO, however when "push came to shove" independence was generally always asserted.

Tim O'Grady is CSIRO Records Services Manager

The journey towards a truly corporate records management service for CSIRO has been an interesting one, mistakes were made, tough decisions had to be taken and opportunities were uncovered.

This article will outline the bumpy ride towards achieving a new records management service for CSIRO. The implementation of an EDRMS within an organisation is not something to be taken lightly. The challenges faced can include technological challenges, change management challenges, project management challenges, financial challenges and political challenges.

CSIRO, the Commonwealth Scientific and Industrial Research Organisation, is one of the largest and most diverse scientific institutions in the world with more than 6000 staff located across 56 sites throughout Australia and overseas.

## Organisational structure

I would like to add another challenge to the list. How we structure our record management services is critical to the overall performance or success of a records management service. I would also argue that without a suitable Records Service structure the implementation of an EDRMS or other significant change management process is possibly doomed to failure.

CSIRO has an organisational history built around Scientific Divisions. These divisions were essentially groupings of particular expertise e.g. Engineers, Chemists, Meteorologists, etc. Divisions within CSIRO were semi-independent self-contained organisational units reporting to a central authority (Head Office). Each division generally had its own structure and staff, laboratories and buildings.

Each division was led by a Chief. This structure persevered until fairly recent times and has only recently been replaced by a more unified organisational model.

The implication for Records Services in CSIRO was that there were as many Records Operations as there were divisions in the organisation. In fact in a previous life I was responsible for issuing software licences for our EDRMS, TRIM, within CSIRO and at one stage we had 22 individual implementations of TRIM.

Some divisions did not have a formal records management operation, whilst those that did ranged from part-time services to mid-range operations with 3 – 4 full-time staff. In the mid 1990s a loose coalition or network of records management staff developed with the aim of improving the standard of records management in CSIRO. This network was voluntary and generally whenever independence was threatened there was a breakdown in the network. In more recent times support services such as HR, Finance, IT and Records Management have been removed from the responsibility of divisions and support services have been delivered corporately. Records Management

was established as an enterprise service in 2005 and has undergone a number of restructures until the present day.

In 2010 I was given the opportunity to lead RM Services within CSIRO. At that time we had approximately 28 staff spread across all states and territories, with the exception of the Northern Territory. Our structure for delivering services to CSIRO was built around 3 geographic regions:

- Northern Region – NSW & Qld
- Southern Region – VIC, SA and Tas, NT
- Central West Region – ACT and WA

Whilst this structure did break down the old divisional control of records management services it did give rise to the development of 3 separate Records Management operations. Providing a consistent service to the organisation within this structure was a challenge. The range of products and services provided within each region were different and as a result Records Management service quality was not consistent across CSIRO. My view was that the organisation needed a records management service that provided a discrete set of products that could be delivered consistently regardless of location. So our journey began to find a structure that enabled us to achieve this outcome.

I think it is unlikely that a perfect model exists for records management services. Organisations are so very different, whether it be in terms of size; industry type; or sector (private / government).

Records Management operations are also very different in terms of size ranging from very small 1 -2 staff to very large 30 – 50 staff. They also vary in the type and range of services provided, particularly where hard copy records are still the primary method of record-keeping as distinct from those organisations operating within an electronic record-keeping environment.

In my view there isn't a model that best suits most organisations, there are too many variables that make this impossible. However I believe there are some basic steps that can be used to assess if your current model is suitable and give you an idea of what changes might be necessary to put in place a model that works for your organisation.

So what are the key ingredients for successful Record Management Service?

In many organisations I have worked for in the past "Records Management" is seen as a mysterious practice. Perhaps more art than a science. As the manager of a records service I felt it was an impossible task to manage something that I couldn't' easily define. I needed some boundaries. I needed to know what is was we did and more importantly, what we didn't do.

A colleague of mine at CSIRO once said to me "The problem with Records Management in CSIRO is that we make it up as we go along." What was implied by this statement was that in CSIRO the approach to any records management challenge was to develop a bespoke solution. On a positive note this could be viewed as a client centric or agile approach, however from a management perspective it was a nightmare, with many varied approaches to records management existing at the same time. One of the problems leading to this was there had been no standards to guide Records Managers in CSIRO and no shared understanding of what it was that we did.

One of the first activities we undertook was to draw some boundaries around what the Records Group did in CSIRO. To

*(Continued Over)*

# A History of Scientific Innovation


Some research highlights of the seriously talented scientists that work for CSIRO:

- The first Australian organisation to start using the internet, which is why it was able to register the second-level domain csiro.au
- CSIRO Developed Aerogard between 1938 and 1961 to help keep flies off cattle and prevent disease – and even trialled it on Queen Elizabeth II when she visited in 1963.
- Invented permanent pleat for fabrics (saving all that ironing!)
- Five CSIRO scientists invented wireless LAN technology, these days known as Wi-Fi, which is now used in more than five billion devices around the world.
- Invented the Interscan Aircraft Landing System
- CSIRO invented plastic bank notes – polymer currency is now used in more than 30 countries around the world – to help prevent counterfeiting and to last longer
- CSIRO invented extended-wear soft contact lenses
- The word 'petrichor', which describes the distinct smell of rain, was invented by CSIRO researchers Isabel Joy Bear and Richard Grenfell Thomas in 1964.

that end a very basic model was developed. Called the Records Services Model it was the first attempt to define what services we provided to the organisation.

Using a jigsaw as a metaphor (see diagram at right) helped sell this concept within the Records Services team e.g. putting the jigsaw pieces together so to speak. A pretty simple approach but it got people talking and thinking about what we did.

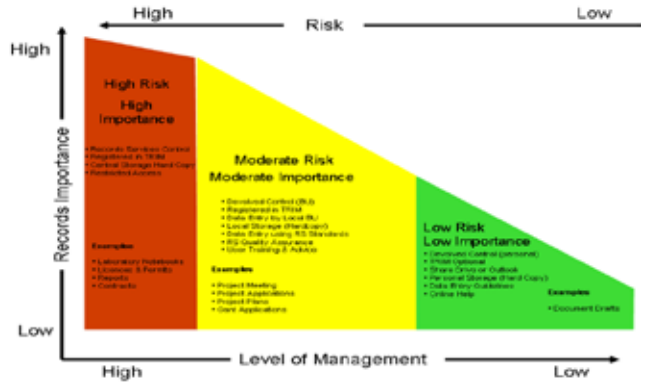
Some of the naming used in hindsight is a little clunky; however just getting the team to use common language like "Records Curation" was a big step forward.

Once we knew more about what we did, we started assessing to what extent we could provide these services within the resources we had at our disposal. Like most commonwealth government agencies increasing resources was not an option, in fact as we would find out in 2012 a reduction in resources was likelier.

One of our key findings was that it was not possible to provide a full service to the entire organisation. We had to work smarter and somehow we had to develop a model that ensured CSIRO met its records management obligations with the limited resources it had at its disposal. In an attempt to prioritise the work we had to deal with, we developed a Risk Management Framework for Record-keeping. This framework is a common-sense approach to making sure you maximise your resources to deal with the most important work.

As a result CSIRO has adopted a risk and value-based approach to the management of CSIRO Records in its Records Management policies. This approach categorises records on a scale of importance or risk and determines the level of management required. The model was developed using a risk management approach to record-keeping, acknowledging that Records Services should focus resources on the management of those records which are most important to CSIRO.

The colour coding of the risk categories (above) into red for

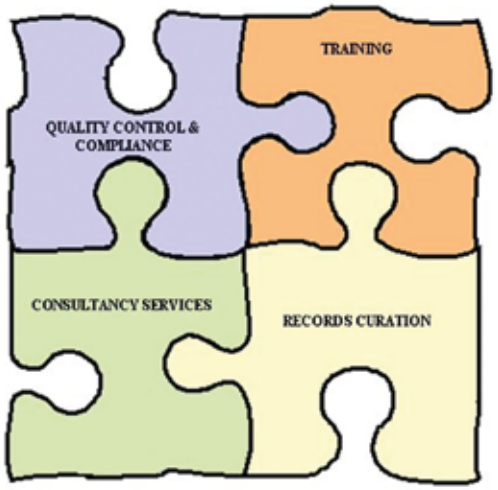



high risk, yellow for moderate risk and green for low risk introduced some new language into the CSIRO Records Management lexicon "Red Zone Records" meaning important or high risk records. The development of the risk framework and the associated treatment methods for records within each category was a revolution in CSIRO records services and our clients. The pieces were starting to come together. We had the makings proper business model. Next we needed a structure to enable us to best deliver our services.

## Finding the Correct Fit

With the greater clarity provided by our Records Services Model about the services we provided the organisation and a strategy to deliver those services within our current resources through our Risk Management Framework we could now start to build a structure that would deliver the services in an effective way.

It would be unfair to characterise the change process outlined so far as a linear progression for Records Services in CSIRO. It was more an evolution of ideas and then building on those ideas.




The Records Service Model

There was never a clear mandate given to me or anyone else up to this point to develop the Records Services Model or the Risk Management Framework. They developed through discussions, disagreements and reflection. In some ways their origin lies in trying to find solutions to problems we encountered in the delivery of Records Services to CSIRO over a number of years.

This slow evolution of ideas came to an abrupt end during 2012 and a revolution commenced. At this time an organisational restructure saw records services lose some 6 FTE positions out of a total of28. A radical rethink of our structure was required and thankfully some of the work we had undertaken over the past few years informed us on how best to meet these challenges.

The end result was a move away from a geographical structure for records services to what in CSIRO is referred to as an Enterprise Model. Rather than dividing the team into separate cells to provide services to a limited group of clients, we formed a single group providing services to the whole organisation. The principle underpinning the design was "Records Services anytime and place". There is nothing original in the design we developed. I admit that I looked more to the corporate world to provide examples rather than the government sector on which to base our design. My objective was to turn records services into a "Business" with products we could market to our clients. It would be nice to think at some point we could sell these services, but at this point this would be a very big challenge and may be beyond my capabilities.

The structure we implemented has divided the Records Services staff into 3 teams:

Business Partners – our consultancy service, providing advice and training to CSIRO business units. This group also has responsibility for procedure development.

Client Support – Our first point of contact. Responsible for the delivery of routine service products and referral of requests to other RS teams.

Collection Services – Responsible for the management of our considerable hard copy collections (approximately 20 km)

Sometimes it takes an external event like a restructure to create a step change to operations. We all knew where we were heading but there was no imperative driving to get there. The restructure created that sense of urgency required.

As a footnote to this restructure I should make a few observations:

- From the time we announced our intention to move to a new structure and forming teams was about 4 months.
- Some very difficult decisions were taken with regard to staff reductions.

• I cannot over estimate the need to treat team members with respect during a restructure process.

• Whilst in the longer term the result has been a good outcome for Records Services in CSIRO it did have a profound impact on staff working in the team. Both those remaining and those that were made redundant.

The structure of our teams was only part of the story, some additional ingredients were required to make our new service successful.

CSIRO is lucky to have excellent IT infrastructure and Records Services takes full advantage of the tools available to us to support our clients. Clients can contact us online no matter where they are located using a request management tool called ServiceLINK . This tool enables clients to access specific products such as training, request the registration of a file or contact us with a general query.

Virtual training sessions can be convened for staff located across the country using desktop video conferencing software called MeetingPlace and real time support can be provided using the same tool to remote into clients PCs to install and configure software or troubleshoot problems.

We provide online documentation via our intranet site to assist clients with record-keeping and we have a single phone contact number the "Records Hotline" for urgent contact, or those not able to access our online requests tools.

It is important to note that whilst we have modernised the way we deliver our services and communicate with our clients, we still maintain a physical presence on most of the major site locations in Australia and when required we can still send a real person to help out. To that end the structure we have implemented was guided by the availability of tools that could make it happen. Without these tools I believe our structure would be quite different. In that sense I know we are very lucky to work in an organisation that is well supported with IT infrastructure

## Success or Failure?

The new structure has given Records Management Services in CSIRO a tighter focus. We run our operation using many management techniques borrowed from the world of business, for example :

1. We measure what we do. This is the only way we can assess performance.

2. Through our risk management framework for record-keeping we have a strategy context in which to deliver our services. It guides us and helps us keep our service on a consistent path.

3. We document everything. Records Management operations have been effectively codified in CSIRO and we no longer "make it up as we go along". Most processes have a supporting document and when they don't we draft one up.

4. We invest in our staff and their professional development.

5. Our structure gives us the ability to more easily adapt. Whether it be responding to changes in technology or incorporating additional services into our business.

6. Most importantly we know we need to continually change. Such is the nature of organisations these days we are probably still one or 2 steps behind where we should be. The next change for us is just around the corner.

## What's Next

I don't want to create the impression that everything is perfect in CSIRO. We still have some significant challenges with compliance. Support and awareness by senior management is also a problematic. So everything is by no means perfect, but we do know that our performance is improving every year.

The good news is that we find our Records Management Service in CSIRO expanding the range of products and services it offers to the organisation. In the last year we have been able to implement and cessation service, which sees all staff leaving CSIRO contacted regarding the return of any records. We have also implemented a quality assurance service that reviews record entries in our EDRMS to ensure compliance with standards.

We are currently considering offering support services for SharePoint in addition to our current EDRMS and a large secondary storage facility for our 20km of hardcopy records is also planned to come on line in early 2015. Our training group is equipped with a range of skills and tools that make it possible to train in areas outside our traditional areas of activity and our records consultant group are poised to develop their technical skills and work closely with our Information Technology colleagues in system design and development.

We are set up for success and capable of competing for organisation resources. It's up to us, so watch this space.

# Concerns raised over WA State Records

**The inability of the WA State Records Office to accept physical or digital records from government agencies has been highlighted as a cause for concern in the 2013/2014 Annual Report for the WA State Records Commission. Chairperson Colin Murphy is concerned about the ongoing lack of adequate, specialised archival accommodation for the State's archives and in particular with "the increasing volume of digital information stored within systems which may not provide the best protection and preservation of that unique government information."**

"The SRO has been unable to accept transfers of State archives since 2001 and is still waiting to secure a purpose built State Archive (incorporating a Digital Archive)."

The WA State Records Office holds the largest documentary heritage collection in the State. It comprises over 2 million archives from 1,838 government agencies that occupy nearly 15 linear kilometres of shelving

"Because of its inability to accept the transfer of hard copy archives from State government agencies due to a lack of specialised storage space, approximately 53 kilometres of identified State archives, numbering over six million records, are stored within government agencies or amongst temporary records in commercial records storage facilities that do not meet archival storage standards.

"The annual increase of State archives awaiting transfer to the SRO is estimated to be between 1.5 to 2 linear kilometres. The SRO has estimated the value of these archives to be approximately $A250 million."

The report also highlighted the ongoing need for a Digital Archive to accommodate an increasing proportion of State archives in digital format.

"As with State archives in physical format, the responsibility is currently on each government agency to manage its digital archives. This is an onerous task given the fragile nature of electronic information. Digital Archives are being established in other Australian Government jurisdictions but WA is yet to meet the needs of government in this area."

Victoria is the only Australian state to implement a dedicated digital archive. The NSW State Records Office has now successfully completed its pilot and is now in production mode.

Other states are still in the research phase and working to obtain budget.

## Konica Minolta launches private cloud ECM

Konica Minolta Business Solutions Australia has announced a dedicated cloud platform for small business and Enterprise ECM, known as the WeOptimise Cloud. WeOptimise is an off-premise private cloud providing hosted Software-as-a-Service solutions. The first to be offered is an Enterprise Content Management Service, able to be customised with the support of Konica Minolta's consulting services. The WeOptimise Data Centre is hosted in Australia to deal with data sovereignty and security concerns.

"Our new solution meets growing end-user demand to improve document workflow solutions and buy software as a service. It also positions us for greater influence in the way our customers consume, manage and pay for IT services," said Mike Dooner, Product Marketing Manager, Document Management Solutions, Konica Minolta Australia.

Konica Minolta is partnering with FileBound and Hyland OnBase for a range of ECM solutions offered both in the cloud and on-premise.

Fileound Small Business Edition is target at Small Business and only supports up to 10 concurrent users and a maximum store of 2 million documents. FileBound Enterprise Edition supports unlimited users and up to 20 million documents. OnBase has a lot more features typically required by large organisations, e.g. records management, compliance tools, vertical industry specific software and case management. It also offers Vers2 compliance required by government clients.

## Empired acquires Intergen Ltd for $A17.4M

Australian listed IT services company Empired has acquired IT services provider Intergen for $A17.4 million due to be paid over a three year period with $A5m paid on completion through a combination of cash and shares.

Intergen is a Microsoft Dynamics ERP and SharePoint specialist with over 370 employees, nearly doubling Empired's existing workforce capacity bringing total headcount to approximately 800 staff.

It is one of three suppliers on the New Zealand All of Government ECM as a service panel along with Open Text and Team Asparona (an Oracle based solution) and is currently delivering this cloud service to four large NZ government departments.

Commenting on the transaction Mr Baskerville, managing director of Empired said "This is a transformational acquisition for Empired. It strategically positions Empired as the largest provider of Microsoft based application services in the Australasian region and cements us as a leader amongst our ASX listed peers in scale, capability and geographic reach."

"Our customers will benefit from a broader range of services, backed by a strong Australian listed company that offers superior service and agility to its international competitors."

## Cooper Grace Ward moves to NetDocuments

Australian law firm, Cooper Grace Ward, has switched their document and email management from iManage to the NetDocuments cloud-based document management and collaboration platform.

Cooper Grace Ward, one of Brisbane's largest independent law firms, has chosen NetDocuments to replace their existing on-premise document management solution with the help of Feynbrook, one of NetDocuments certified channel partners servicing the Australian market.

"Cooper Grace Ward's focus on modernising technology has been crucial in their decision to choose NetDocuments," said Marc Duncan, regional sales manager in Australia.

"Their commitment to their clients remains the firm's top focus, and NetDocuments will further legitimize this commitment by providing the firm a modern document management platform with enhanced security, collaboration, and efficiency."

"We chose NetDocuments because it is the only document management solution that addressed our requirements of ease of use and management, along with increasing the level of security for our documents and emails", said Miz Brmbota, IT Manager at Cooper Grace Ward.

"It also allows us to share documents with clients and other professionals in a timely and seamless manner, and we look forward to leveraging the excellent functionality that comes out of the box."

## eDiscovery Maturity Self-Assessment

A free tool designed to help organisations measure and improve their ediscovery processes has been released by the standards group EDRM. The EDRM eDiscovery Maturity Self-Assessment Test (eMSAT-1) is a downloadable Excel spreadsheet containing 25 worksheets organised into seven sections covering various aspects of the e-discovery process. Complete the worksheets and the assessment results are displayed in summary form at the beginning of the spreadsheet.

"This self-assessment resource is just the beginning of a dialogue," says Kevin Clark. "The EDRM Maturity Model team will be developing a series of specific self-assessment guides and practical e-discovery tool kits all aimed at a common goal: helping organisations measure and improve their e-discovery processes."

eMSAT-1 is the first of several resources and tools being developed by the EDRM Metrics group, led by Clark and Dera Nevin, with assistance from a diverse collection of industry professionals, as part of an ambitious Maturity Model project.

"E-discovery literature often focuses on amorphous concepts like 'proportionality' or what is 'reasonable,'" says Matthew Knouff, team leader of the Maturity Model initiative.

"However, corporate stakeholders, legal teams and others who want to improve e-discovery effectiveness within their organisation might not understand how to implement those concepts in a practical manner.

"EDRM is focused on defining clear metrics so that companies can take a measured approach to improving their e-discovery processes. We are doing something new that is designed to help organisations make tangible improvements."

The eDiscovery Maturity Model, of which eMSAT-1 is the first part, is dedicated to building practical resources that facilitate discussion among all stakeholders throughout an organisation, allow for meaningful self-assessment of current e-discovery practices and offer practical means for process improvement.

The EDRM Maturity Model Self-Assessment Test is the fourth release in recent months by the EDRM Metrics team. In June 2013, the new Metrics Model was released, in November 2013 a supporting glossary of terms for the Metrics Model was published and in November 2013 the EDRM Budget Calculators project kicked off.

"The EDRM Maturity Model represents a consolidation of many of the resources the EDRM Metrics team has developed over the past year. We look forward to actively engaging the global e-discovery community with this project," says Nevin.

Primary contributors in the development of eMSAT-1 are Knouff, Evan Benjamin, Tiana Van Dyk (Burnet, Duckworth & Palmer LLP) and Brett Livingood (Bryan University).

*eMSAT-1 is available for download at www.edrm.net/resources/emsat1.*

## Guidance unveils file recovery tool

Guidance Software has introduced EnCase Remote Recovery +, a remote data recovery and system diagnostic tool that enables IT help desk professionals to recover deleted files from anywhere on their networks without user disruption. It also supports system troubleshooting, helping to avoid computer downtime.

Based on the EnCase Enterprise platform, EnCase Remote Recovery + is a simplified version of the powerful digital investigation software that features a streamlined user interface and deployment process. This easy-to-use new tool does not require training nor forensic expertise.

Most employees have lost an important document that must then be recreated, or deleted a critical email, later needed to prove a point. EnCase Remote Recovery + not only recovers files from nearly every type of storage device with any operating system, it recovers the files remotely, saving companies travel and shipping costs.

With EnCase Remote Recovery +, IT help desk professionals can quickly recover deleted files such as emails, PowerPoint presentations, contracts, and photos while users continue to use their computers. In addition, IT help desk staff can search a variety of storage devices for lost files including servers, desktops, USBs, memory cards, MP3s, and digital cameras. The product works with all major operating systems, including Windows, Linux, OS X, NetWare, Unix, HP-UX, Solaris, and AIX.

"The network has dramatically expanded outside the traditional office, with employees working on multiple devices in locations all over the world. The practice of sending IT help desk staff to different locations or requiring employees to ship their computers for repair is an antiquated, inefficient use of resources," said Victor Limongelli, president and CEO for Guidance Software.

"With EnCase Remote Recovery +, not only can IT help desk staff assist employees in any location, they can do so without disrupting employees' work, helping to increase the productivity of both IT help desk staff and affected employees."

EnCase Remote Recovery + was developed by leveraging the EnCase Enterprise platform, currently deployed on more than 22 million endpoints in 70 of the top Fortune 100 enterprises and many government organisations around the world.

## DocsCorp Image Crawler for eDOCS

DocsCorp has entered into an agreement with OpenText to offer its contentCrawler technology to eDOCS DM clients under the name OpenText Image Crawler.

OpenText Image Crawler will ensure all documents in eDOCS DM are 100% text-searchable, helping to reduce legal and compliance risks as well as productivity losses.

More than 20% of documents in a content repository are "invisible" to search technology. These documents often get profiled in content repositories as a result of ingestion of legacy or litigation documents, saving emails with attachments, mobile technology and employee workarounds, which bypass the OCR'ing process. Failure to produce documents on demand impacts the bottom line, workplace efficiency, regulatory compliance, productivity, and exposes a business to unnecessary risks.

OpenText Image Crawler is an integrated analysis, processing and reporting framework designed to enable OpenText eDOCS DM administrators to search and query the database libraries for image-based documents.

It can then convert these documents to text-based PDF documents, profiling the resulting documents back into OpenText eDOCS DM with minimal intervention. Once profiled, the OpenText eDOCS DM index server will index these image documents, which had previously been invisible to text searching.

OpenText Image Crawler integrates with OpenText eDOCS, MS SharePoint, and MS Windows file systems.

# Lighting up your enterprise data

**The challenge of automating information extraction is at the core of the Sintelix text analytics platform from Semantic Sciences, a CSIRO spinoff established in 2008 by founder Daniel McMichael and now being utilized by corporate and government customers in Australia and globally. At the US Department of Defense it is employed in tandem with data analytics technology from tech darling Palantir, best known for its work on behalf of the US government's intelligence community. Simon Kravis interviewed Daniel to learn more about the commercial uptake of this sophisticated text analytics solution.**

**SK: What the current state of the art for computers processing text?**

**DM:** Computers have been processing text since the 1950s – so in the sense of simple raw text processing, the tools are well established. Of course the real game is finding new ways to lower costs and create new benefits, products and services. Before we tease those out, let's pause for a second to think about what presence of written language has done for computing: in some sense, it's an embarrassment – because representing what a passage of text is saying with digital computers is not easy. But this mismatch has become an amazing opportunity to bring the richness of the concepts and relationships that text can express into practical software.

The biggest productivity gains come from replacing the reading and transcribing documents by people with accurate automatic information extraction. The biggest innovation opportunities derive from novel technologies such as summarisation, the ability to induce networks from data and linking information across documents and databases. These capabilities are progressively revolutionising eDiscovery, investigation, intelligence, research and many other areas.

Let's look at a basic business process: you load your input data from a file store, record management system or scan it from paper. Then you extract some information from the data, which is then stored, sent downstream or visualised. Processing scanned legacy data obviously requires optical character recognition (OCR) – and while modern day OCR is good enough for search, it makes far too many errors to be useful for information extraction. One of the capabilities Sematic Sciences provides is automatic error correction which greatly reduces OCR error rates. This enables us to tackle many previously impossible information extraction tasks.

Further down the pipeline, beyond OCR, lies information extraction, where there have been significant improvements in generic web scraping and the number of languages offered by entity extractors that find valuable information such as names of people, places, and organisations in unstructured text. The most significant improvements are found in narrow areas with high commercial value, such as extracting data from invoices and resumes.

Overall, I think that there have been significant improvements, but broad coverage high quality solutions are hard to find. We often see that the complexity and range of product offerings can leave customers confused and they often end up with inferior or high cost solutions. I think that there's a real knowledge gap.

**SK: How did Semantic Sciences and its product Sintelix get started?**

**DM:** Semantic Sciences kicked off 6 years ago. We spun out from CSIRO and won a contract with Prime Minister and Cabinet to do a stack of interesting stuff to help the intelligence community in the text analytics area. After about three months, the steering committee called us in and suggested we tear up the statement of work and focus on creating a system for extracting entities (like people, locations, times and events) from free text – but with much greater accuracy than was available on the market. It was a challenging task – but we were happy to oblige, especially

when after 18 months we had brought Sintelix to life and created a solution with on fifth of the normal error rate. The success of our company owes a great deal to their courage. Our entity extraction capability remains world best.

Since then, we've created a raft of new text analytic capabilities: network creation, network exploration and decision making. These have opened the way for us to create tools for fraud detection, metadata extraction, predicting group decisions, financial analysis, records management, recruitment, intelligence and defence. Besides accuracy, we have focussed on providing a world-leading suite of configuration and tuning tools, so that users can gain outstanding results for *their* tasks on *their* data. For example, we recently did a project to extract metadata from archival patents so that they can be effectively searched. The agency involved seemed amazed that it was possible to achieve the quality we provided. There's little human intervention, so it's also very cost-effective.

A recent development has taken us into analysing group decision making process for an issue. Sintelix gathers information from across large numbers of documents to create a table of stakeholders and their key parameters. This task came out of work we are doing for the US Department of Defence. Topic analysis is the first pass; the second identifies stakeholders. Sintelix then determines the stakeholders' positions on the issue, how much they care about it and how much influence they have relative to the other stakeholders. We've helped them reduce the effort for this task from about a month to half a day, which provides them with good and timely initial intelligence estimates.

**SK: How does Semantic Sciences work with Palantir? (Backed by the CIA and US National security Agency, Palantir is a Silicon Valley startup now valued at over $US9 billion that grew out of efforts by PayPal co-founder Peter Thiel and Stanford engineers who wanted to track down Russian crime syndicates that were defrauding the payment company.)**

**DM:** Palantir is a widely used data analytics tool that works very well on structured data. It can ingest documents, but documents have to be manually marked up to identify entities to be processed. This is a very slow process. The Sintelix plug-in for Palantir can identify entities automatically and then link them. This greatly improves the productivity of Palantir installations which work with documents.

**SK: Do you think text analysis will be a part of mainstream computing in future?**

**DM:** I think that this process is well underway. Obviously, the lead industries cluster around the internet, but benefits to productivity and effectiveness from quality text analytics are already having a huge impact in many C2B, B2B and internal business processes. I think the development of the text analytics market is following the classic profile of supplier proliferation, then progressive incorporation into main stream products and finally consolidation. We're currently experiencing both supplier proliferation and mainstream incorporation.

**SK: What plans does Semantic Sciences have to avoid a consolidation squeeze?**

**DM:** We're fortunate in having a lot of high quality, well integrated, easily configurable technology. That's helpful, but doesn't provide any guarantees. One of our key strategies is complementing well-known mainstream products including Palantir, I2, SharePoint and SQL-based DBMSs. We also focus on international markets, initially the US, then Canada and now the UK. Our technology is being "white label" incorporated into main stream products. Even though we have strategised for growth, the life blood of Semantic Sciences is technical excellence and making customers happy. That's what carries us forward.

An award-wining scholar of St. John's College, Daniel graduated from Oxford University with a PhD in Engineering Science in 1983. His career took him to CSIRO, where he led the team that created the Cognizant Control Room, a research platform developed in association with Boeing as part of Project Wedgetail, Australia's Airborne Early Warning and Control aircraft. This aimed to provide alerts to an operator's awareness from his speech and GUI interactions. That solution borrowed ideas from natural language processing - which from the early 2000s became his passion. In 2008, he stepped out of a research career to found Semantic Sciences with a mission to create tools for analysing unstructured data at a new level of accuracy and integration. Alongside a team of researchers he has brought to life Sintelix.

## Untangling taxonomy with TopBraid

TopQuadrant, a semantic data integration company, has released version 4.5 of TopBraid Suite, a collection of web-based solutions that simplify the development and management of standards-based, model-driven solutions for enterprise taxonomy and ontology management, metadata and reference data governance, and data virtualization.

"The TopBraid 4.5 Release delivers to customers enhanced flexibility to meet their requirements for more capable and connected, semantic model-driven solutions," said Irene Polikoff, CEO and co-founder of TopQuadrant.

TopBraid EVN supports business stakeholders who need to collaborate on defining and linking enterprise vocabularies, taxonomies and metadata used for information sharing, data integration and search. New features of TopBraid EVN 4.5 include:

Improved Configurability: For EVN Ontology Editor, a form builder allows browser window management, enabling users to open multiple view forms, open tree and chart windows, and resize them.

Collaborative Workflow: With EVN Vocabulary Explorer, a broader community can comment on published vocabularies.

Enhanced Audit Trails: Changes resulting from import of files and comments are captured immediately upon saving.

Improved Search Form: Search on cardinalities, regular expressions, aggregates in the search counts and charting of results are now enabled.

Label Management: Ability to manage labels as independent resources; supports use cases where metadata is required on labels (SKOS-XL).

*http://www.topquadrant.com*

## Acaveo delivers data classification

Acaveo has recently announced the availability of Smart Information Server 3 to help companies rapidly understand their unstructured data and seize the opportunities of hybrid cloud storage, data classification and security assessment.

Complementing Microsoft Office 365, OneDrive for Business, SharePoint Server, Windows Server, StorSimple and other services, this new version of Smart Information Server delivers on Acaveo's strategy of leveraging metadata to centrally audit and manage unstructured data in a hybrid cloud business productivity infrastructure.

Smart Information Server 3 delivers new insights to uncover stale folders and sites, orphaned data, legal hold data, entitlement data maps, group memberships and more. These and other powerful insights are now available through a simple mode of the software.

Combined with Acaveo's recently announced Discover Program, these insights are attainable by companies at low risk and low cost to assist them with quick assessment of their unstructured data as part of larger project initiatives.

Smart Information Server 3 includes the ability to audit data classifications, regardless of how they are applied, and to apply classifications to data residing in on-premises and cloud-based repositories according to comprehensive rules in the software.

Smart Information Server 3's data classification features include tight integration with Windows Server File Classification Infrastructure for auditing, reporting and applying attributes to data in Windows file shares. Data classification can yield significant benefits, such as acceleration of migration to the cloud, improved data security, compliance efficiencies and improved ways to manage the organization's resources.

Smart Information Server 3 adds comprehensive auditing of Active Directory users and groups and their entitlements to unstructured data. Visualization and reporting of change deltas to identity attributes and group memberships assists with reporting needs for Sarbanes-Oxley compliance. Microsoft StorSimple support has been added in Smart Information Server 3 to allow companies to increase their adoption of the Microsoft hybrid cloud. Smart Information Server is designed for unified visibility and control of unstructured data across the hybrid cloud.

More information about Smart Information Server 3 can be found on the Smart Information Server product page of the Acaveo website.

## Navigating through "Dark" data

Innovative Routines International (IRI), Inc., has announced a new graphical tool to quickly and inexpensively capture information in unstructured data sources, or what Gartner calls "dark data."

According to Gartner Analyst Douglas Laney "enterprise dark data" is "unutilised or underutilized information, collected generally for a single purpose — then forgotten or archived." Laney posits that "Organizations have capitalized on this treasure trove of internal emails, contracts, reports and other types of data by looking for patterns, leading indicators and correlations."1

To help enterprises leverage their dark data, IRI has released an "Unstructured Data" edition of its IRI NextForm software. The 4-figure data migration product finds, structures, manipulates, and reports on, data in: text, MS Word, Excel, and PowerPoint files; PDF, RTF, and XML documents; and, email repositories.

Inside the IRI Workbench GUI, built on Eclipse, the NextForm data restructuring wizard searches unstructured files on networked drives for keywords and patterns using regular expressions. It scans the sources to identify, associate, extract, and send the matches (along with optional forensic metadata) to a flat file. It also creates data definition file (DDF) metadata for IRI software products in the same GUI to use in data integration, replication, federation, remapping, masking, reporting, and franchising applications.

This technology and its Eclipse environment also support:

- joining the search results with data in structured repositories (e.g., DBs) for analysis
- development of domain-specific semantic ontologies through the DDF metadata
- discovery of changes in, and key relationships between, the data, plus master data
- data visualization tools like BIRT, and analytic engines like R, in the same GUI

*http://www.iri.com/*

## Taxonomy Tool for managed metadata

Concept Searching has announced a new add-on option for its auto-classification, and taxonomy management software known as conceptTaxonomyWorkflow.

It provides administrators with the ability to independently manage access, information management, information rights management, and records management policy application within their respective business units and functional areas, without the need for IT support or access to enterprise-wide servers.

It aims to enhance compliance and information governance initiatives by accurately applying policy across applications and content repositories.

The product is available as an optional component for all Concept Searching product platforms.

Used by the majority of Concept Searching clients, it has been employed as a migration tool, to automatically declare documents of records in the identification and protection of secure content, to improve any business process that needs to access and take action on metadata.

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1. AIMI End user Survey (Aug, 2013) *Terms and conditions apply.

# Does managing information involve the risk of personal liability?

By Greg Lever

**The risks to Australian organisations associated with the management of information have been widely discussed amongst business leaders and in the media since changes to The Privacy Act 1998 (Privacy Act) took effect on the 12 March 2014. From our perspective, what has not been discussed is personal liability which relates to employees with a responsibility for the management of organisational information.**

With the assistance of K&L Gates LLP, we set out to understand if any such liability could exist. What we unearthed, has provided pause for cautionary thought and business consideration.

The Privacy Act itself sets out personal information handling requirements for Australian Privacy Principle (APP) entities, which are defined as both agencies and organisations. Whilst agencies and organisations can be liable for civil penalties of up to $A1.7 million for serious breaches, the good news is that the Privacy Act does not impose any liability for breaches upon individual directors, officers or employees of APP entities.

However, document retention processes and policies could still attract a range of potential personal liability issues for a company's directors and officers. This personal liability could arise from their duties under the Corporations Act 2001. Any person falling within the definition of an officer is subject to the requirements and duties of this Act.

This definition is both extensive and far-reaching. It includes a director or secretary; a person who makes, or participates in making, decisions that affect the whole or a substantial part of the business; a person who has the capacity to significantly affect the corporation's financial standing; and, a person whose instructions or wishes the directors are accustomed to act.

It is accepted in Australia that directors and officers are not liable for a company's torts or civil wrongs merely by reason of their office. Nonetheless, a plaintiff or complainant could bring a claim against directors and officers personally at common law under the tort of negligence.

The recent James Hardie case has shown that, whether a person falls within the definition of "officer" under the Corporation Act requires a factual analysis of the person's role, responsibilities and decision making ability within the business. In addition to this case, recent Australian case law lends support to the proposition that it's not just directors who can face personal liability. It may include company executives operating at a senior managerial level if he or she makes, or participates in making, decisions that affect the whole, or a substantial part, of the business.

Furthermore, where a director or officer of a company holds another title, for example, the position of records manager, he or she is likely to be treated as an officer. This could expose this person to liability for any breach of duty owed under the Corporation Act in respect of his or her conduct both as a director and in his or her other role or position.

## Destroying Evidence

In the criminal context, it is important to be aware of state, territory and Commonwealth legislation in Australia that prohibits a person destroying a document where the document is, or may be, required in evidence in a legal proceeding. Although, the legislation varies in each jurisdiction, generally each provision requires an element of 'intention'.

Criminal law generally recognises that intention can in some circumstances include recklessness, wilful blindness and negligence. However, the legislation relating to the destruction of litigation documents requires specific intention which means that recklessness, wilful blindness or negligence is not sufficient to prove the elements of the relevant crime. For example, in the case of R v Selim, the court found that, in order to be guilty of destroying evidence, the person must be aware or reasonably contemplate at the time the document was destroyed, that legal proceedings may be initiated in the future.

The maximum penalty of destroying documents that may be required in evidence in a legal proceeding will depend on which jurisdiction governs the crime. However, penalties include imprisonment for up to 10 years and a range of fines. To minimise the risk of severe penalties, a company should suspend any automatic document destruction processes to preserve all potentially relevant evidence where there is a real prospect that they may be involved in litigation.

## Reducing Risk

There are steps that can be taken to reduce risk and seek to limit the potential exposure of directors and officers to personal liability. The organisation should regularly check that there is a comprehensive and appropriate process in place to encourage compliance with document retention requirements and to detect potential legal issues. If a company does not yet have a document retention policy, it should ensure that one is created to prevent the destruction of important documents or equally, the retention of unnecessary documents.

Management could also consider commissioning a periodic independent external audit of the company's document retention and destruction practices to ensure that the company is complying with the policies, procedures and practices aimed at document retention.

It is important that all employees are aware of company policy and documented procedures. Putting the correct training in place can also reduce the risk of document related claims being made against the company and its officers.

There is no doubt that this is a very challenging space for organisations and employees to navigate. Unfortunately, our world now dictates that this swell of information being created will only increase. It is therefore critical for organisations to move swiftly to put in place the correct processes to safeguard the business, their customers and their own employees from risk.

*Greg Lever is Managing Director of Iron Mountain Australia*

# NSW Government to introduce ePlanning

NSW Minister for PlanningPru Goward has introduced an amendment of the NSW Environmental Planning and Assessment Bill to Parliament. The Environmental Planning and Assessment Amendment Bill 2014 facilitates the introduction of ePlanning for NSW via an online planning portal

In her introduction of the Bill to Parliament, Ms Goward said, "The bill … will bring enormous economic benefits to the State by simplifying the planning system and making it easier to do business whilst also increasing transparency and access to information.

"The bill brings the planning system into the twenty-first century by introducing ePlanning, which will give people better access to planning information and decisions anywhere and at any time.

"The Environmental Planning and Assessment Act is currently based on a system of paper plans and maps, with important planning information required to be published in weekly newspapers. New South Wales needs a modern planning system that is up to date with the way people do business and communicate with one another.

"In July this year I had the opportunity to launch a range of free online tools as the first step towards modernising the planning system. The release of those tools was made possible by this Government's $A30 million commitment to deliver a range of online planning services and information, announced as part of the 2014-15 budget. In the first two months, over 35,000 visitors have gone online to use the ePlanning tools.

"The next step is to provide the necessary statutory backing for ePlanning. The bill establishes the New South Wales planning portal, where people can access information and interactive maps to help them understand the planning system, and how they might be affected by planning decisions. The planning portal will be the one place where both State and local government information will be available at the click of a button.

"Applicants will be able to take advantage of online lodgement and tracking of planning applications, which will dramatically reduce the time and resources currently spent on producing hard copy volumes and make it easier to do business.

"Using three-dimensional [3D] visualisation tools, ePlanning will allow the community to see how a proposed precinct actually will look and give them the tools they need to contribute to the planning process.

"The bill also resolves copyright issues that arise when planning information is published online.

"Local councils have long expressed concern about their ability to reproduce plans and other documents submitted with a development application. The bill will enable councils to be protected from breaching copyright laws, without disadvantaging copyright owners, by enabling planning applications to include a licence to use copyright material and a warranty that the applicant has a licence from the copyright owner.

"These protections will be limited to local government and the State Government and will not enable third parties to use or reproduce publicly available planning information without the express approval of the copyright owner.

"Finally, the bill will make a number of other minor amendments such as updating references in the Act to the director-general of the department to the secretary of the department. I commend the bill to the House."

# Winning the digit

**After a review of state-wide ICT undertaken by the incoming Queensland state government in 2012, Queensland State Archives (QSA) faced a major challenge in developing a strategy for public records in business systems earmarked for decommissioning. The review revealed that there were a large number of business systems across the 20 departments at or nearing their end of life - over 1700 in total. Over half of these systems were identified as potential candidates for decommissioning.**

Statements made in the Queensland Parliament by the then Minister for Science, Information Technology, Innovation and the Arts, Ros Bates, underlined the cost of maintaining aging ICT. The Minister estimated that by decommissioning 175 so-called "dust gatherers" alone, the government could save in the order of $8-10 million per annum.

"Dust gatherers" was the term coined to describe those systems which contained data that was no longer being referred to for current business purposes.

The audit focused only on 'significant' ICT systems. Out of scope were a further 20-30,000 minor business systems on the books of the 20 state departments.

Consequently, QSA doesn't have a complete picture of the state of these systems, and by extension the public records in them. However, there is a sense that these 1700 legacy systems are just the tip of the iceberg.

The ICT Audit Report recognised that the decommissioning of many legacy systems would depend on the availability of a "mechanism for digitally archiving their records." The government looked to QSA to provide leadership by helping to solve questions around any data in those systems deemed to be public records.

It became obvious that agencies would need immediate help to identify first of all which systems contain public records, and then which of these public records can be disposed and which ones need to be kept.

Agencies would also need guidance to understand what options were available for preserving any digital records which needed to be retained.

Under pressure to find ICT savings, agencies would not be looking for a prescriptive, silver-plated preservation solution, but a range of feasible options that would meet their recordkeeping obligations.

QSA saw this as an opportunity for good recordkeeping to be seen as part of the solution, not the cause of a legacy system backlog. While any solutions put forward had to be achievable, QSA also recognised that the legacy ICT problem was in some part a symptom of low digital recordkeeping maturity across agencies.

QSA also had a leadership obligation to emphasise the need for whole of life planning around recordkeeping in business systems - or risk a repeat of this problem in the future.

## Underlying themes

Clearly, reducing the cost of the government's ICT portfolio was one of the main themes of the Audit Report. Of course, archival authorities and records managers, have long advocated for routine, timely disposal of records; not for compliance reasons, but to avoid unnecessary data storage and management costs. In this respect, QSA welcomed the government's enthusiasm to decommission legacy business systems.

QSA was also very conscious of its role to ensure that financial and technology considerations were not the only or main criteria for deciding the fate of the records, and that agencies gave due regard for the proper means for disposing or preserving the affected public records.

The need to strike a balance between accountability, risk, corporate memory, and value for the Queensland taxpayer's dollar was underscored in a discussion paper on the implications of the ICT Audit that QSA released to Queensland's integrity agencies. The discussion paper was sent to the Queensland Integrity Commissioner, the Crime and Misconduct Commission and Crown Law among others.

# tal end game

By Ingrid MacDonald , Acting Principal Research Analyst, Digital Archives at Queensland State Archives

The Discussion Paper argued that the:

Scrutiny of government's decisions and actions around the rationalisation of State Government debt is of public interest.

[and] In this context, QSA is particularly conscious of its role in ensuring that the recorded memory of government is safeguarded, while supporting the efficient disposal of public records, where appropriate.

The response QSA received to the paper was overwhelmingly supportive – indicating that from an integrity perspective at least, the balance was about right.

## Methodology and toolkit

QSA released its decommissioning business systems methodology and toolkit in October 2013. The strategy is presented as an interactive workflow diagram which helps agencies navigate through a variety of disposal scenarios. The use of an 'interactive map' is a first for QSA.

The interactive map can be explored here: http://www.archives.qld.gov.au/Recordkeeping/BusinessSystems/DecomWorkflow/Pages/workflow.aspx).

The main thing to note is that most records can be covered by one of four key disposal scenarios:

1. Records have already been successfully migrated - the source records may be disposed of under the General Retention and Disposal Schedule for Digital Source Records

2. Records have been irretrievably lost - the corrupted records may be destroyed once QSA has been formally notified and supplied with sufficient supporting evidence

3. Records are covered by an existing Retention and Disposal Schedule issued by the State Archivist – time expired records may be disposed of at the appropriate time; records nearing their retention period may be eligible for early disposal approval

4. Records are not covered by a schedule – they must be retained and preserved - unless the public authority applies for and is granted a one-off disposal authorisation.

A fifth scenario, working through the decision making process around whether a business system contained public records, was discarded early on in the development phase.

## First challenge – are they all records?

The decision to regard all data in business systems within the scope of the audit as public records was based on a number of factors. Existing advice was that not all data in business systems would necessarily be deemed public records. To be a public record, it must provide evidence of a business transaction.

It also stated that:

While some business systems may seem to be an information source rather than a record of business transactions, closer examination may reveal that they are actually a record.

Under normal circumstances, agencies are required to undertake careful analysis of their organisation's functions, activities and recordkeeping requirements and then match those requirements to data captured in the business system. In reality, determining whether a business system contains public records and identifying what constitutes 'the record' in a system is a very complex issue and requires IT and records management expertise.

The risk of the possibility that public records might be lost, or their completeness, useability, or integrity might be compromised if data was not recognised as being records was considered.

This risk was deemed to be higher in the case of legacy systems. Particularly for those systems which had not been in active use for some time or had been inherited through a machinery of government change.

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More importantly, the definition of a public record under Queensland's Public Records Act 2002 is quite broad – broader than the definition that appears in ISO 15489.

The definition under s 6 states that a public record includes information:

- (1a) made for use by or a purpose of a public authority
- (1b) received or kept in the exercise of its statutory, administrative or other responsibility, or a related purpose.
- A public record also includes a copy of a record, or a part of a record.
- Records sourced from another public authority, for example, are records in their own right.

Given that all business systems contain information used for a business purpose, as broadly defined by the Act, and for the aforementioned reasons, there is not a step in the methodology which includes determining whether the system contains public records or not.

## Appraisal Challenges

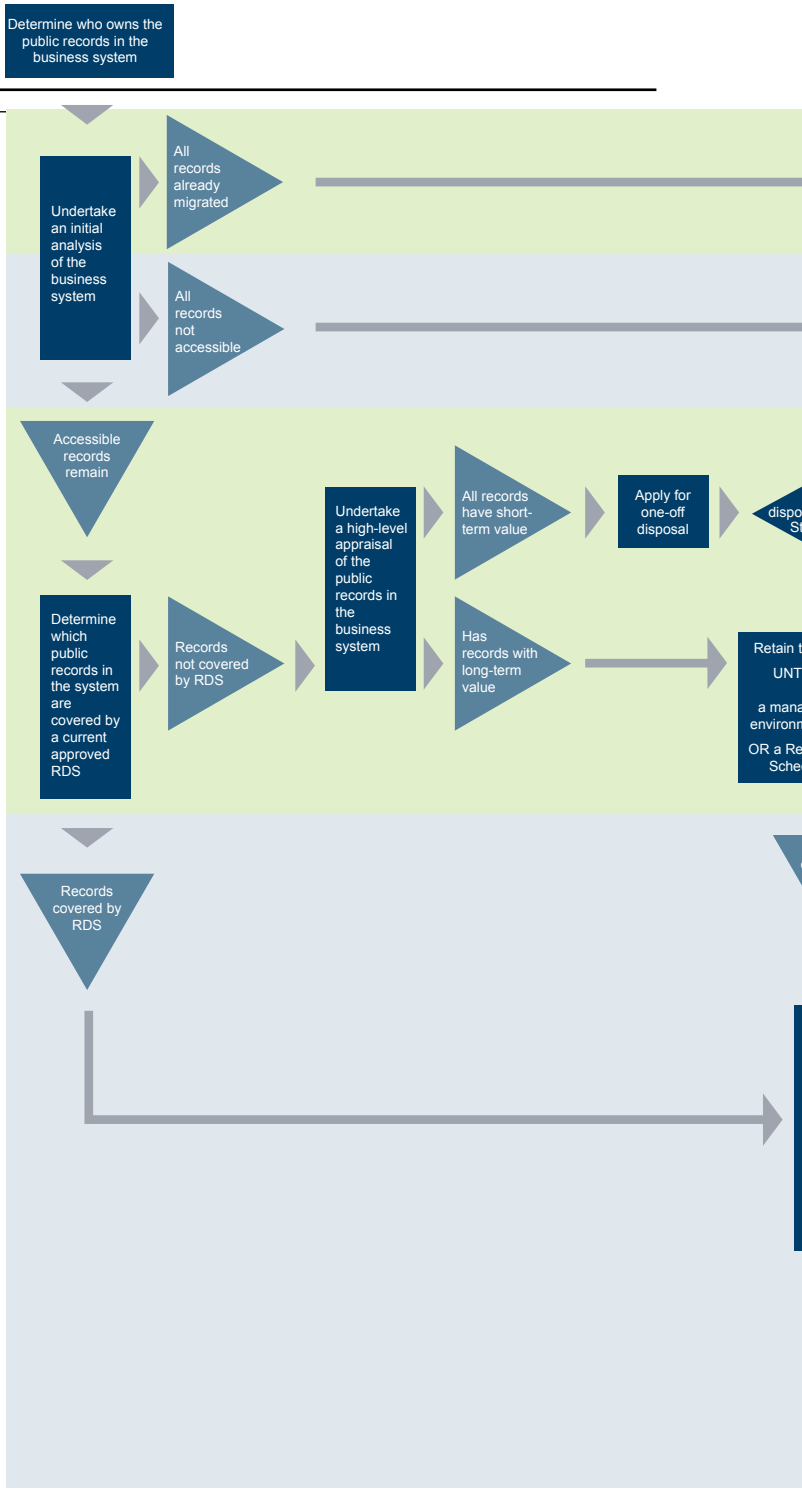
Until now, QSA didn't have a formal avenue for agencies to request an ad-hoc re-appraisal of records. In the past, if agencies had requested a review of the minimum retention period for records because physical storage had suddenly become an urgent issue, QSA would take a dim view. However, in this context, where the digital public records were already at risk of loss, there was a legitimate need for re-appraising the value and feasibility of continuing to preserve records, particularly those which were close to meeting their authorised retention period.

To be considered for 'early disposal' approval, records must be within five years of their minimum retention period. A five year cut-off was considered a reasonable compromise from a risk, accountability and practicality perspective because the need to access temporary value records and the risk of them being needed for legal purposes diminishes as records approach their expiry date.

Of course, approval of an application for early or one-off disposal could not be automatic or guaranteed. Each case would be assessed on its merits.

Other appraisal issues included:

- consideration of what evidence is needed to judge whether a defensible case for disposal exists (particularly with regard to the technical viability of the records)
- capacity issues – for example, did QSA have enough experience in-house to appraise business systems records in a timely manner without over committing resources? This was meant to be a streamlined approach in order to meet an urgent need.



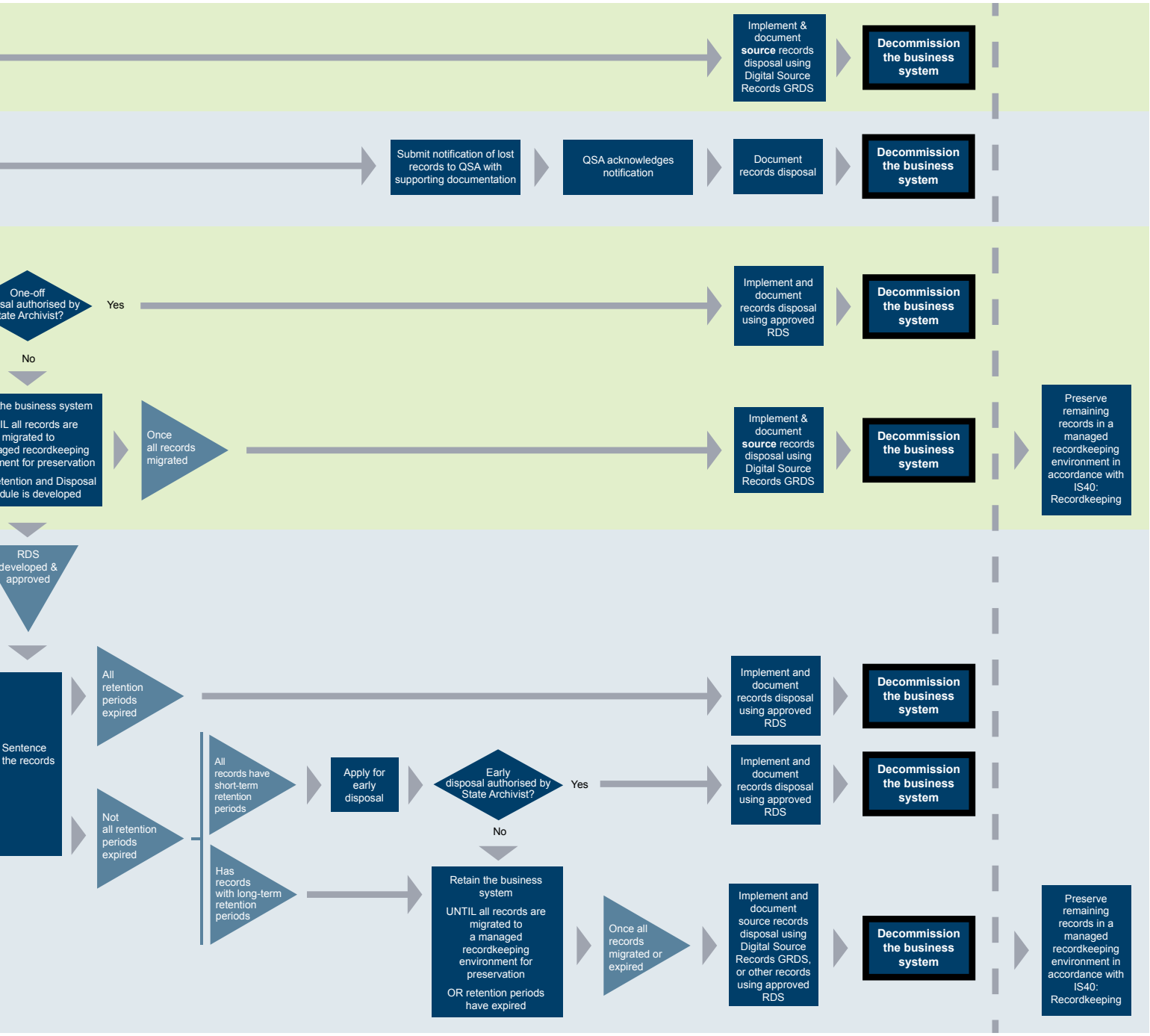

## Treatment of 'lost' digital records

Given that a number of systems covered by the ICT audit were already at their end of life, it was anticipated that some public records might already be 'lost', requiring the creation of a formal notification process.

To avoid the inappropriate or over-use of the notification process by agencies who might wish to 'write-off' records which it deemed too expensive to recover, it was important to have a clear definition of 'lost'.

After consulting with IT colleagues in the Queensland Government Chief Information Office, it was determined that a record is irretrievably lost if:

- a malware attack has compromised the integrity of the records and they cannot be restored
- the hardware required to read the media on which the records are stored no longer exists & cannot be bought in from specialist firms, or
- the data is dependent on reference material that has ceased to exist.




## Preservation approaches

QSA's most comprehensive advice relating to digital records is the Migration Guideline and the Metadata standard and guideline. In 2013 QSA also released a guideline on selecting storage media for digital records.

As part of the toolkit, QSA produced high level, short, easily digestible advice on selecting file formats and the options available to agencies for preserving digital records from business systems, and the limitations of some solutions.

The advice highlighted the fact that there was no one size fits all preservation approach – it is up to the agency to test the feasibility of each option given their particular constraints.

How successful has it been?

QSA is at the moment reviewing its learnings and following up with agencies to see how agencies have been using the methodology and toolkit. Here are some of the initial learnings:

- To date, there have not been any applications for one-off or early disposal. Nor have there been any notifications of lost digital records. However, this does not mean that the methodology did not achieve its goal. It might suggest that many systems are already covered by one kind of disposal authority or another (the source records schedule, the general administrative schedule, an agency specific schedule), and the methodology reminded agencies that they could be disposed of without further reference to the State Archivist.

- Some agencies have indicated to QSA that responsibility for data in business systems is still largely outside the remit of records management staff. That is, application owners have led the decommissioning process and records areas were not necessarily in a position to drive the uptake of the methodology. In light of this, CIOs of state government departments were deliberately involved in the development of the products, and kept abreast of the release, so that at least they would be aware of the process to legally dispose of records in affected systems

Agencies interviewed to date have indicated that the interactive methodology diagram in particular has been very well received.

In one state government department at least 39 legacy systems have been decommissioned using QSA's decommissioning

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methodology. This particular agency also developed their own agency implementation suite of policies, tools, check lists and templates, based on those in the QSA framework, to ensure that recordkeeping and disposal is being considered when decommissioning and in the design of replacement systems.

Of the known systems that have been decommissioned following the audit, most of the records were fully migrated to new systems. Disposal of the source system records was already covered by QSA's existing General Retention and Disposal Schedule for Digital Source Records, but agencies are reminded of their ability to dispose of these records in scenario 1 in the workflow diagram. The bulk of systems in this category were key business systems that agencies regarded as systems of record, where legal requirements mean that the systems are well designed to create and keep records. Feedback from agencies indicates that they see themselves keeping custody of the records in these systems and preserving them over time by successive migrations into new systems as the current technologies become obsolete.

Agencies deployed a variety of preservation solutions for temporary value records which were not expired. Some records in those systems were determined to be of short term value only and were exported into their electronic document and records management system eDOCS, printed to paper and exported to a relational database management system with a few sample queries and reports designed to enable access to the data to answer common questions. One business system was transferred to CDs and attached to a paper file (an approach not sanctioned by the recordkeeping area).

Information and feedback from agencies on the use of the toolkit will be used by QSA to build a case for a whole of government program of work to build agency capability in this area.

## Lessons learnt

There is more work to do around defining the types of systems and the records they produce.

Feedback from agencies has indicated a need for a more risk-based approach which allows them to focus their efforts on critical systems, not low value systems. This may be possible to achieve by modifying the existing methodology, or it may mean a completely new tool.

A key aspect of this issue is whether or not the approach taken to treat all data in these legacy systems as public records is one that QSA wishes to take forward as part of its business as usual policy advice. The bigger picture issue of what is data and what is a public record in the digital environment has broader implications for QSA's existing Recordkeeping Policy Framework and therefore requires resolution to support QSA's digital continuity program.

It is an important strategic issue that will be worked through in partnership with QSA's strategic Information Management and ICT policy partners across government and agencies, as several priority streams of work hinge on this issue. For example, the digital appraisal review and QSA's Digital Archiving solution testing project.

From an agency point of view, there are definite benefits, as Gartner and others suggest, in having consistent approaches to information management and governance across their multiple types of content.

As previously mentioned, some agencies have flagged that they intend to keep custody of the records in their most significant systems and preserve them over time by successive migrations into new systems as the current technologies become obsolete. This has been an important lesson for QSA, as future services and solutions for improving digital archiving capability across the Queensland government are considered QSA also needs to consider what it means from an appraisal and custody perspective if key agencies have no plans to transfer these permanent records to a whole of government permanent digital archive. Queensland does not have a formal distributed custody framework.

Conversely, there are agencies with little interest or capacity for preserving records which have no value for immediate business use such as business systems comprising records relating to discontinued programs or initiatives, and records which have been inherited as part of a machinery of government changes. These types of records tend to be copied to CD and forgotten.

This is where opportunities might exist for market provided preservation services and for QSA to provide access to preservation tools such as SIARD which is currently being road-tested.

In the future QSA hopes to deliver more value to agencies by putting practical solutions in place.

## Where to from here?

A similar audit was recently commissioned by the Public Records Office of Victoria (PROV) into business systems held by Victorian state departments. It will be interesting to see what tools and advice PROV releases in response, and to leverage those where possible.

The interactive workflow diagram has been very successful and there are many different applications where this concept can be used to deliver recordkeeping messages, based on different user scenarios.

QSA's current program of work is for example focusing on issuing more advice about assessing the recordkeeping functionality of business systems to enable disposal.

The ICT Audit report put a spotlight on the need for digital archiving repository services to preserve legacy digital records on behalf of agencies. It also reinforced the high level of risk associated with agency archiving approaches which rely on access to sufficiently skilled personnel to maintain purpose-built software applications.

For QSA the timing of the recordkeeping lessons highlighted in the ICT Systems Audit has been fortuitous as it coincides with its work to secure support for a whole of government approach to digital archiving in Queensland. An immediate follow-on benefit was the inclusion of digital archiving actions into the Queensland government's ICT reform strategy.

QSA's longer-term digital archiving vision includes digital archiving solutions and services which will benefit both those agencies with a business need to maintain their own long term and permanent digital records, and those who have limited capability or interest in establishing digital preservation programs.

# Moving Content and Metadata between systems

By Anethea Ulvestad

**Applications generally have a lifespan of about 10 years. This means that sometime during your working life you will be faced with the challenge of migrating data to a new EDRMS, CMS, or other record-keeping system. It's a common scenario when line of business systems reach end-of-life, and one that requires some consideration before you go to tender, make a capital funding submission or do anything at all.**

Migrating data between systems is complex and generally difficult so you will need to be prepared. Often your implementation partner, whether it is the vendor, an external contractor or even your internal IT staff, will try to minimise your expectations. So before you begin it's vital to decide what is feasible or reasonable to migrate. Do not be swayed by technological considerations at this stage. Focus on the data requirements of the business and recordkeeping compliance.

It's also important to understand some basic information about database-driven applications.

Databases often sit behind applications known as the front end. The application provides forms to add data to the database and provides a compiling mechanism for the data to create 'Records' in the form of search queries and aggregation.

Databases are a way of storing, managing and retrieving information. They do so through the use of tables . Database tables consist of columns and rows . Each column contains a different type of attribute (what we call metadata) and each row corresponds to a single record. Each record has a unique ID. The relationship of the tables to each other is represented through a schema. Schema tells you the database names of the attributes and the relationship between the attributes.

This is typical of the common relational databases such as Microsoft SQL, Oracle and IBM DB2. These can also add data and compile data based on scripts and queries. SQL (Structured Query Language) is a standard language for making interactive queries from and updating a database.

## Database Schema

In order to undertake a migration of data successfully, it's essential to have a clear understanding of what is known as the Database Schema. This sets out the links between tables and identifies metadata fields and is one of the essential elements you should have in place before you begin a migration.

If at all possible get the schema for your database. This may be difficult as many vendors regard it as their intellectual property (IP). However t is vital to have so you know what front end metadata fields are compiled ie data is pulled from several different tables. A good example of this is what is known as current location in a number of different applications. This can be compiled from the record number table, the officer table and the date moved table. This means that it will not behave the same way when extracted from the database. It is also important to find out where attachments live, whether "Objects" are stored separately to the data on a shared drive and where log files live.

You will need to get to know your IT people. This means making sure you aren't talking at cross-purposes. Database administrators (DBAs) generally will not understand records management terminology so get used to translating into database speak. Always clarify when using RM jargon – terms such as file, disposal and archive mean very different things in IT speak. Chocolate biscuits are still good currency when cultivating IT. Terms such as Defensible disposal can be used to differentiate the records management meaning from the IT meaning of disposal (which is just to purge).


You must also know what version of your application you are running. Identify any cumulative updates and patches to the version of the software you are currently running. This is where your newly acquired relationship with IT will start to pay dividends as they should know this information. They will also know what type of database your application backends to e.g. MS SQL Server, Oracle, IBMs DB2?

Records management professionals are still the subject matter experts when it comes to information, so ensure that you are involved in identifying which metadata fields will be migrated and which ones are not required. After you have identified all of the metadata fields that are required, check which tables these fields correspond to in the database. This is where your schema is vital. Pay particular attention to concatenated fields ie ones that pull from multiple tables. Verify all decisions about metadata fields that will or won't be migrated with the relevant business units to test your assumptions. Often usage changes over time and you may need to migrate fields that were previously not used. When analysing the metadata fields that are to be transferred it's important to know whether they have configuration constraints. Wherever possible try to translate old metadata fields to new metadata fields. The old practice of dumping all the data that was too difficult to map into the Notes field does not work and should be avoided at all costs.

Data Migration is also a time for data cleansing. When it comes to data cleansing, records managers tend to fall into two camps, those who want it perfect and others who decide it is too hard. There is a middle ground that can be achieved by calculating the best use of your time and resources. Do as much as you can through the front-end of the application so your actions are recorded in log files. Some data cleansing can be done via a back-end script but changes will not be recorded in log files so avoid using this method unless it is truly necessary.

Remember before you embark it's essential to do your homework and find out as much as you can about your application and how it's used in your organisation. Be prepared to ask questions and learn about database administration and good luck. You will need it.

*Anethea Ulvestad is a Records Management Compliance Specialist at South Australian Water Corporation.*

# A Tale of Two Countries - the Digital Disruption of Government

**A research paper analysing the differing experiences of the UK and Australian governments in attempting digital transformation finds there is an urgent need for a change of vision and strategy, with Australian agencies bogged down in the past and burdened by thousands of PDF forms**

"Notwithstanding the $A5 billion spent on technology every year by the federal level of government in Australia (just at the national level), reform of the Australian government administration and service delivery arrangements is impeded by an out-dated operating model that undermines the broader policy objectives of government," the report notes.

The report was authored by Marie Johnson, Managing Director and Chief Digital Officer of the Centre for Digital Business and Dr. Jerry Fishenden is an independent technology advisor, including to the UK Government.

The report found the United Kingdom and Australia offer interesting insights into administrations that have long seen the opportunity to be seized, but which have repeatedly struggled to deliver the scale of improvement required in the way their public services are designed, operated and maintained.

It contrasts the objectives and approach of the "*Coalition's 2013 policy for E-Government and Digital Economy*" in Australia to the objectives and approach of the "Government Online Strategy 2000": to ask what has changed in the last 14 years.

"The "*Government Online Strategy 2000*" spoke about "online action plans", putting all "appropriate" services online by 2001, delivering all "appropriate" services electronically by 2001, ensuring the online availability of printed forms and the desirability of "online forms", and articulated the concept of "integrated services". Enablers such as authentication and metadata standards were called out, as well as the ground-breaking achievements of the delivery of the Australian Business Number (ABN) and the successful multi-jurisdictional online platform to business, the Business Entry Point (BEP). Despite the progress that was made, a check of any government website soon reveals listings of many hundreds of PDF forms. An inventory across government would measure thousands of forms. And peering inside agencies would soon reveal an unspeakable treasure trove of all sorts of forms lurking on internal networks.

"Three essential components were missing from the "*Government Online Strategy 2000*". Firstly, meaningful outcome-based targets were absent: the Strategy was heavily qualified by evasive references such as "appropriate', "pragmatic" and "agency based approach". Secondly, citizen centric was defined in terms of the agency e.g. "agency's clients". There is nothing citizen centric about having dozens of agencies each having their individual specific views of the citizen. Of course, "client centric" is not the same thing as "client experience": just ask the clients (citizens). And thirdly, and perhaps most importantly, it was not about transformation – it explicitly ruled out replacing services or channels. The objective was to "…deliver all appropriate Commonwealth services electronically…complementing – not replacing – existing written, telephone, fax and counter services." Doing so would simply add another silo service channel, increase costs and hence fail to deliver any meaningful benefits.

There is nothing citizen centric about having dozens of agencies each having their individual specific views of the citizen.

"The "*Government Online Strategy 2000*" vision of "a seamless national approach to the provision of online services… [where]…a user of these services should not need to understand how government is structured…" remains a noble but as yet unrealised vision.

"For all the efforts, the question is "Why?". Those initiatives that were successful and enduring – the Australian Business Number, the Business Entry Point and later Vanguard and Standard Business Reporting – were driven by a political and economic agenda. These initiatives took a whole of government – not agency specific – multi-disciplinary delivery approach and were greenfields.

"They were new and transformative business models; and importantly, they were based on metrics and analysis to demonstrate the economic impact and benefit – the target was to reduce the estimated $A17 billion per year red tape impact on the Australian economy.

"One area of concern in the Coalition's "*2013 policy for E-Govern-*

*ment and Digital Economy*" – and similar strategies in other jurisdictions – is an apparent ambiguity between "digital" and "ICT". It is essential that the difference between "digital transformation strategies" and "ICT strategies" is understood. As currently articulated, the policy needs to better differentiate between "ICT Strategy" and "Digital First". Though clearly related, "digital" and "ICT" are different concepts and the accountabilities, objectives and measures of success are different.

"Digital" spans a wide brief, including the transformation of the organisational model and culture, radical process change, accountabilities for citizens' experience, new models of service delivery, realtime feedback, tangible operational efficiencies, measurable business value, and the use of data driven insight to improve and inform policy formulation. ICT strategies partly enable this transformation – but in the legacy environment, siloed approaches can impede it.

## A failure of capability?

"Both in the UK and Australia, the gap between vision and reality over previous decades remained largely consistent. There was a significant failure of capability, characterised by the idea that the transformation of government administration and service delivery could be achieved by simplistically throwing "IT projects" at some of the public sector's most ingrained problems.

This failure has often been wrongly legitimised by numerous audit reports, capability reviews, and various inquiries and media reports In the decade preceding these capability reviews, the Australian National Audit Office (ANAO) and various audits of inquiry dealing with "IT projects" have variously pointed to the complexity of systems, the lack of an architecture, the lack of business engagement, inadequate or scarce skills, and problems of "IT" procurement. "IT projects" are identified as costing too much, delivering too little, or failing. Standing back from all the individual Capability Reviews, audit reports and various inquiries – and looking strategically and systemically – there appear to be some fundamental governance and assurance questions to be addressed.

"Why are new capability or reform initiatives persistently described by various audits, reviews and reports as "IT projects"? Responsibility and accountability cannot be understood or attributed within such a segmented frame of reference. And how can it be, that after a decade of such audits and massive investments, recent Australian Audit Office and Capability Reviews continue to point to persistent "IT issues" rather than looking below the surface at the actual causes that lie beneath the skin?

"Is it merely that keeping "IT projects" at arm's length provides a convenient scapegoat for more damning failures of leadership, management, governance and reform in our public sector organisations? The poor results of this broken approach speak for themselves: a comprehensive comparison of several countries' performance undertaken by a distinguished group of UK academics found a wide range of results when it considered how effectively IT was being implemented by governments around the world."

The report found promising signs of progress in the UK, with the establishment of the Government Digital Service (GDS) and the move towards a "digital by default" public service strategy

Although in Australia, it claims much work remains while almost 35 per cent of government transactions are still carried out manually (face-to-face, over the phone, by correspondence, etc.). "Of those that are carried out "digitally", it is unclear what percentage of these are actually completed end to end online:

• Government agencies still manage over 105 million voice calls per year

• Many of the 170 million face-to-face transactions were to prove identity (this is up from 110 million 8 years ago)

• Only four agencies provide interviews and/or customer services by digital video

• Some 250 million letters are still sent by the Commonwealth each year

Equally, it found the "technology" acquisition arrangements in the Australian Government are overly bureaucratic and process-focussed.

"The Australian Government Information Management Office (AGIMO) for example has no less than 50 ICT procurement panels. There are companies – large and small – who in order to deal with government are registered on up to 60 panels across the federal level in Australia. These processes do not strengthen governance – but add to cost, risk and impact delivery.

"In a more positive move, the Victorian, New South Wales and Queensland governments are all pursuing the development of better service business models. However, in the federal government sphere, there is still very much a prescription of technology – which is not only an outdated approach, but highly risky given the pace of innovation. And because there is no digital capability architecture, agencies are each procuring the same or similar capability from an agency-specific perspective. This "process" focus rather than "architectural" focus drives multiple costs and risks across government without achieving interoperability, agility or an improved service and experience for citizens.

"The proposed Welfare Reforms and the new conceptual architecture of welfare reform in Australia will be severely constrained and compromised by the lack of a whole-of-government architecture, the lack of a strategy for the digital age, profound technology obsolescence, and the lack of open interoperability design, when interoperability is the very essence of service innovation in the digital age."

*The paper in part draws on the forthcoming book "Digitizing Government: Understanding and Implementing New Digital Business Models" by Alan Brown, Jerry Fishenden and Mark Thompson.*

# Shhh ... I'm a Records Manager!

**My family and friends have very little understanding of what I do. I guess it doesn't help that as a records management consultant I struggle to explain my extremely diverse role, but it was made worse for me a couple of years ago when I was the Document and Security Manager for a government tender project. A project that was governed by strict probity clauses and involved awarding highly lucrative contracts. I didn't talk about my job. Ever.**

Firstly because as a project team, we were paranoid about protecting the probity of the project. Secondly, I was working ridiculously long hours so I didn't actually have a social life where I met and talked to people. But mainly because it was still boring stuff like naming conventions, file structures, or advising people not to talk about our work in a lift. One of my biggest challenges was getting project staff to save information into our records management system, rather than put it on a portable hard drives that they'd leave on public transport, ready for publication in the paper the next day.

The outcome of me working crazy hours and not talking about my work was that my kids came to the conclusion that I was actually spy.

Now, when I was younger, I wanted to be an Australian Federal Police officer (the Australian equivalent of the FBI). One terrible shot at goal during our Year 12 soccer final, resulting in a torn cruciate ligament put paid to those dreams. So 25 years later, anyone thinking I was a spy was cool, ignoring the fact they were 5 and 12 years old.

Whatever the path that led me to records management, I'm still the FBI wannabe. And I've realised it's because I like law and order. I like rules that I can work to, that make sense and give structure to the things I do. And for those of you who have read my previous articles, you know I hate clutter as well. And you'll know that I am a keen advocate of a retention and disposal authority (RDA). But not one that just sits on the shelf and gathers dust - one that is implemented.

People like me, whose role it is to sentence information, have to assess the facts; the type of information we are looking at, the most recent date associated with it etc., and then make an assessment based on our analysis of this information. Despite our best attempts at RDAs and scope notes, there is still some level of subjectivity. It is still the responsibility of the Sentencer to make the judgment. But whereas a Judge, when sentencing a criminal is presented with the outcomes of extensive investigations, we information Sentencers have to do our own investigations and generally with few or old leads. It's time consuming stuff, and what becomes apparent along the way is that it is scary stuff.

Deciding to take responsibility for how long information will live for and making the order to terminate it, requires more than knowledge. It requires fidelity, it requires bravery, it requires integrity. It requires us to break out the inner FBI agent in us all.

## Fidelity

Amongst the five point definition of Fidelity on dictionary.com, the concept of 'adherence to fact or details', and 'accuracy and exactness' should strike a chord with Sentencers. You don't want to mistakenly sentence a personnel file based on a person's start date. You want to be sure of your decisions. So document them, and get them QA'd by someone else with access to the reference material you have access to. Use the right reference material. Mistakes breed mistrust. So being able to demonstrate fidelity in the sentencing process is the first step towards a highly defensible disposal programme.

Sometimes you just have to stop second guessing yourself and make a brave decision. So there are four locked filing cabinets that no-one has the keys to and no-one knows who owns them. Everyone treats them like a haunted house – they all know they're there, but no one goes near them or talks about them. Go near them. Buy replacement keys off eBay ($4.50 each from a very efficient guy based in Adelaide, confirming that lockable filing cabinets are more of a joke than shared drives when it comes to security). Be brave and take responsibility and ownership of the information in these cabinets, because no one else will.

During some recent work for a client I reviewed 20 boxes of records that we found in the storage cupboard of their conference room. Amongst the plethora of information that these boxes contained included more than 10 unused blank cheque books, a number of personnel files and board papers from 10 years ago - seriously sensitive and confidential information. This is not usual when reviewing records to come across this type of information, so as Sentencers we must be completely and utterly trustworthy. Our integrity must be of the highest. We must be trusted to report and destroy the blank cheque books, not read all of the disciplinary actions and check out people's salaries in the personnel files or get some dirt on the CEO from the board papers.

So is it any wonder that organisations have trouble implementing their RDAs? Is it any wonder that the HR team would rather hold on to their records than have someone rifle through them?

As with most things to do with Records management, there is no easy answer. I know there are a lot of software solutions out there for the electronic side of things, but before you look towards one of these applications as a 'magic pill', use what you already have – your expertise, your fidelity, bravery and integrity, and your RDA Schedule.

And the next time your friends and family ask what you do, you can tell them you're an FBI agent. You keep law and order in your organisation's information. And yes, you have an RDA and you aren't afraid to use it.

Kate Fuelling is a records management specialist with qualifications in business, project management, training and process improvement. Kate's extensive career has spanned the UK and Australia in the retail, corporate, government and non-for-profit sector. KateFuelling@lime-solutions.com.au

# Take your EDRMS users with you

By Esther Till

Change Management can be seen as a standalone activity in electronic document and records management systems (eDRMS) implementations, however it is equally important to consider the way you communicate and offer training and support to your user base. Communication should be the centre point of any eDRMS implementation as it impacts the whole organisation. Disengaged or confused users can lead to a reluctance to adopt the new system and processes, irrespective of the approach you take.

Taking your users on the journey is key to user adoption. This involves communicating clearly and consistently. Picking the right time to communicate is just as important as picking the system. Often this type of project lasts years and user interest can taper off quickly. Talking to your users too early can leave them uninterested in any future engagement efforts.

There are so many components to effective communication it's hard to list them all. Some of the tactics I have found to be fundamental include:

- Picking the right time to communicate (when and how often)
- Using different and appropriate communication channels
- Keeping it clear and concise without project jargon
- Making it relevant to the user
- Use the opportunity to educate users (avoid too much detail)
- Staying positive and focused on the benefits
- Correcting rumours and answering FAQs
- Providing project updates and increasing awareness

Knowledge decreases over time. Conduct your training too early and you run the risk of users forgetting what they have learnt and its' practical application. Conduct it too late and users are already frustrated and unlikely to be enthusiastic about attending.

The latter is also applicable for support, as too often support arrangements are left until the last minute. They have not been tested, nor are they set up to manage the potential issues that arise with a new system.

Well organised and thorough support and training will put you ahead of the game. Simple practices that can be applied to enhance user training and support include:

- Train in smaller groups
- Keep it short and cover only the basics
- Make it mandatory to attend basic training
- Hold follow up 'lunch-and-learn' sessions (optional attendance)
- Incorporate it into the induction process
- Advanced sessions for those with added responsibilities
- Tailor training to the user so it can be related back to day-to-day activities
- Incorporate feedback and suggestions
- Keep theory on records management to an absolute minimum, and focus on the tactical

Some essential ingredients in supporting your rollout include:

- Developing a support plan
- Socialising the support plan with the key stakeholder
- Testing the support processes thoroughly
- Considering the 'what if' scenarios
- Define technical as well as, information and user support
- Document and clearly communicate roles and responsibilities
- Provide key training to support staff.

No eDRMS implementation is ever easy. The key to success is balancing all the right elements. The implementation approach should be equally influenced by technical, information and user requirements throughout this process. Don't forget these things take time.

A specialist in records management, Esther Till is a consultant with Glentworth Consulting.

# Profiting from Knowledge Management

**Patrick Lambe is a world-renowned knowledge management expert with a specialization in taxonomies, knowledge organization, knowledge strategies, and knowledge audits. He is a consultant, writer and researcher, based in Singapore, and with projects in the USA, Europe, Middle East, Asia and Australia. And author of Organising Knowledge: Taxonomies, Knowledge and Organisation Effectiveness (Oxford, 2007). Simon Kravis spoke with Patrick at the Information Management 2014 Annual Conference in Canberra, where he gave a keynote speech "Acting on Knowledge and Information: The Missing Link"**

**SK: How would you define Knowledge Management?**

**PL:** I'd say it's understanding how organizations behave in relation to knowledge and information they use, and putting management actions into place following that understanding.

I've had a lot of exposure to the peculiarities of organizations and their workings, and one thing is very clear: there's no such thing as a universal framework and methodology that would allow anyone to decode any type of organization and come up with a magic recipe.

**SK: How would you rate the computerization of the workplace compared to other technological changes such as printing, and how has it changed power relations in organisations?**

**PL:** The introduction of the printing press is the closest analogy in terms of the social, economic and political impact of a technology innovation, but it was the addition of connectivity via the Internet that really allowed computing in the workplace to scale, and exposed the enterprise to all sorts of external influences, such as social applications allowing open-ended collaboration.

In the beginning, workplace computing was just another piece of technology, like the steam engine, but now IT departments find it very hard to keep up.

Power relations have to be more agile in the computerized environment. To retain power you have to be much more imaginative and prepared to adapt the way you exercise power. It's no longer possible to operate in an unchanging, locked-down way.

To some extent the constraints and defined power relations of the organization are being challenged by the kind of social relations that are more characteristic of the city.

**SK: Are we near the end or the beginning of the changes brought about by workplace computerization?**

**PL:** I think we've only just begun. It's not just the technology, it's the social changes that flow from it. When the printing press came in there were 150 years of serious impact on society, and relationships between communities, different portions of society and countries.

The Internet and associated technology inside organizations is having the same sort of impact. It's affecting how organizations compete for resources, customers and markets, and also how people in organizations relate to each other and to people outside.

**SK: What do you think is likely to change the relationship that people have with technology in the future?**

**PL:** I think invisibilisation is the next thing that's going to happen. With phones, you don't actually notice that there's technology involved in making you aware of your environment and location, where to go for good food or how to get from A to B. The technology involved in search-based apps and context-sensitive pushing of information is going to become even less visible.

**SK: What are some of the ways that knowledge management (KM) can help organizations today?**

**PL:** It can help with a prediction of how and when problems might occur so that they can be forestalled. KM properly done can also disrupt silos by fostering productive knowledge sharing, and enhance agility by simplifying procedures. Procedures for complex incidents need to be simple, with clearly defined responsibilities. These procedures need to be rehearsed so that people have the required competencies and mutual familiarity with their respective roles. Turning to an Incident Management Plan that is 6 inches thick when problem needs a rapid response is not the answer. Easy communication is paramount.

KM can also help organisations improve their corporate memory by helping them audit their critical knowledge and putting processes in place to preserve it. It's then possible to see what the risk exposure is from actions like getting rid of a whole layer of your experienced engineers, for example. Corporate memory is also held in recordkeeping systems.

Records need to reflect the actual state of things, so that other people can access them and understand them. It's worth noting that the standard data-knowledge-information-wisdom hierarchy does not require that records be accessible and comprehensible, only that they exist.

## Kodak Alaris begins again with Dynamics AX and Office365

Emerging from the wreck of the once-mighty Eastman Kodak, Kodak Alaris has taken a Microsoft centric approach to relaunching as a $US1.2 billion startup. The organisation with over 4700 staff in 30 countries is faced with a 2 ½ year task to move to an entirely new ERP system and replace business processes based on the previous environment comprising SAP and Lotus Notes Groupware.

CIO John Milazzo told the Convergence EMEA 2014 forum that the company has chosen to standardise on Microsoft applications, including Dynamics AX as its ERP platform.

"The cornerstone of our IT environment revolves around our chosen ERP [enterprise resource planning] solution," Milazzo said. "After a robust selection approach which involved close consideration of Gartner's research, Kodak Alaris chose Microsoft Dynamics AX for their ERP needs, Office 365 for productivity and is excited for what the Azure cloud platform offering brings to the business."

Christian Pedersen, Microsoft Dynamics AX general manager, writes about Milazzo's comments in a blog post. "At the end of the day, for Kodak Alaris it's all about helping customers unlock the power of images and information. This shared perspective with Microsoft on customer centricity is a common ground that has helped fuel the partnership between the two companies and resulted in Microsoft being chosen as the technology foundation."

Writing on the Microsoft Dynamics blog, Pedersen said, "According to the Turnaround Management Association (TMA), a global non-profit organisation comprised of turnaround and corporate renewal professionals, the creation of Kodak Alaris is "one of the most innovative in the history of cross-border restructurings." Their parent company is a UK based pension fund for existing and former Eastman Kodak employees in the United Kingdom. The fund saw great value in the capabilities of what was to become "Kodak Alaris" and opted to take these as payment for the debt.

"In the past, heavy customisation of the company's SAP implementation meant taking advantage of upgrades became challenging. Upgrading would require going back and modifying prior customisation. A cost prohibitive exercise."

"With Microsoft Dynamics, John's plans for Kodak Alaris are for the organisation to be able to benefit from what is offered in software and to be able to customise business processes without customising code or implementations. Predictability and repeatability are critical for the company's long term goals. As a part of this, Kodak Alaris are planning on utilising Lifecycle Services to manage both the life cycle of their deployment and their business process which make Kodak Alaris unique."

"Combining Business Productivity (with Dynamics), individual productivity (with Office) with the power of the cloud (Azure) Kodak Alaris are on track to leverage the key pillars of the Microsoft Cloud for Business. "The scalability and flexibility of Azure are really exciting. Previously if we needed more computer power for any reason we'd have to go through a complex internal process to make the request. Being able to scale up and down as needed based on capacity is a big deal for us being able to support the business with agility," says John Milazzo.

# Can you defend your decision to delete?

By Michael Osterman

Can you defend your decision to delete data your organization no longer requires? That's a critical question that every organization must address at some point. A survey conducted by the Compliance, Governance and Oversight Counsel found that data can be placed into one of four "buckets":

• At any given time, 1% of data must be retained for litigation holds

• 5% of data must be retained because of regulatory obligations

• 25% of data has some level of business value

• The remaining 69% of data has little or no business value

Consequently, more than two-thirds of data can be safely deleted with little or no consequence.

When unnecessary content is not deleted, storage requirements and costs increase over time as a growing proportion of content must be stored and managed.

For example, if we assume that the typical user generates five megabytes of content per day, that 69% of this content is not necessary to retain, and that the amount of content generated by users is growing at 25% per year, that means that at the end of seven years in an organization of 5,000 users there will be 534 terabytes of superfluous content.

Moreover, content that is not deleted complicates and lengthens searches for information, such as those required for eDiscovery or regulatory audits. These searches become more difficult and more expensive simply because there is more content – most of it not necessary – that must be searched and for which paralegals and others must be paid as part of the discovery and production process. It is also important to note that most of this content is unstructured and so becomes more difficult to search and analyze – classification of this data in some form would add structure and make the eDiscovery and regulatory compliance process easier to manage.

Finally, the potential value of undeleted data diminishes over time while its potential risk does not, thereby increasing its relative risk. Moreover, undeleted data becomes more risky over time because the context that would help to explain it disappears. For example, a set of emails between senior managers that discusses a decision to terminate an employee for misconduct can easily be taken out of context in later years if those who were involved in the decision process are no longer with the firm to provide context or help in its interpretation.

Many decision makers are reluctant to delete content for two important reasons. First, most organizations have inadequate information governance processes or technologies in place, and so most decision makers simply don't know what can safely be deleted and what must be retained. Second, some data retention obligations are rather vague, and so many decision makers opt for a more cautious approach and retain more content than is necessary "just in case".

At a high level, Osterman Research recommends a four-step process for implementing defensible deletion:

1. First, develop consensus among senior managers and all other stakeholders across the enterprise that there is value in deleting unneeded content. This process must include senior line-of-business managers, the CIO, IT management, legal and others that will be impacted by a decision to delete unnecessary information.

2. Second, decision makers need to become aware of how long certain types of content must be retained, as well as what and when content can be safely deleted. This involves establishing retention and deletion policies based on advice from legal counsel, education from regulators, adhering to industry best practices, and creation of specific corporate best practices about appropriate retention and deletion schedules.

3. Third, develop a realistic plan for deleting content – start with one system (e.g., email or SharePoint), one operation within the company, or the oldest data in the organization first. In order for a defensible deletion plan to work, it must be manageable and not overly ambitious if it is to be successful.

4. Finally, implement the appropriate technologies that will aid in the process of deciding what content can be defensibly deleted. These solutions will include archiving systems that can index content appropriately, classification systems that will categorize content properly, eDiscovery tools that will help to determine what is important and what is not, etc.

While not a simple process, defensible deletion will pay enormous dividends, both in elimination of the direct costs associated with storing too much content and in reduced risk to the enterprise.

*Michael Osterman is President Osterman Research.*

## US State agencies may delete emails after 5 days

A US judge in Pennsylvania has ruled that State agencies that permanently delete emails after five days are not violating the State's Right to Know Law, denying an injunction sought by newspapers. ommonwealth Court President Judge Dan Pellegrini ruled the newspapers failed to show the Governor's Office of Administration and the 47 agencies it oversees have a duty to retain emails for at least two years.

A section of the State's Right to Know Law specifically says the law does not change any agency's existing public record retention policy, even if emails are destroyed after five days, Pellegrini said in a 12-page opinion. Employees of state agencies can decide for themselves whether an email is a public record, the judge reportedly wrote. An email deleted from an employee's inbox is held for five days in the agency's server. It is then deleted after five days and can't be recovered.

The newspapers said the policy violated the 2008 Right to Know Law because emails of executive agencies are presumed to be public records and public access to them is reviewable by the Office of Open Records. The newspapers said agencies may not decide an email's status and purge it within five days. They claimed the retention policies nullify the due process rights created by the Right to Know Law.

Retention rules for email in the US vary across State borders. In New York, email is automatically discarded after 90 days unless an employee specifically tags it. And in North Carolina, executive branch email of any kind must be kept for at least five years.

Every state has policies governing how long records are saved and when they can be purged—if ever. But those retention policies vary greatly across states. Often employees have to determine on their own whether to keep or delete an email.

Some states keep email on their servers for about 90 days, as a backup in case employees accidentally delete it or there's a system failure. Others retain it for seven or more years as part of their overall public records maintenance, according to Todd Sander, executive director of the Center for Digital Government, a research and advisory group that works with state and local governments on IT issues.

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# Tracking the health of your Accounts Payable process

By Christophe DuMonet

**Health, and more precisely, measuring your health, is the new craze. With Microsoft recently launching its new tracking wearable device Band, people can track and measure dozens of parameters related to their activities and their health. Already most runners and cyclists use applications such as RunKeeper and Strava to track, measure, map and analyse their runs and rides. And then there is the social aspect of sharing your data with your friends as these applications also come with a Facebook style website where you can follow other people, share your data, compare your activities and performance against yourself and others, and even share pictures.**

So how does this trend impact the traditional Accounts Payable (AP) process? Clearly paper-based AP processes do not allow for much tracking and measurement. Of course, one could manually and painfully record the date of reception of a paper invoice and the date when the invoice data was entered into the company's ERP and by whom. Similarly one could record the time it takes for each invoice to complete the coding and approval workflow. Although some tracking and measurement are possible, barely any company invests time and resources to do so with their paper-based AP processes.

Since the Global Financial Crisis companies have focussed on cost reduction as growth has significantly slowed down in many industries. Those companies reviewed many of their internal processes and targeted their back office operations that involved plenty of manual and paper-based processes.

Accounts payable automation solutions help reduce operational costs via improved productivity of AP officers, the elimination of manual processes, the introduction of digital workflow and electronic archiving.

Digitalised business processes provide the perfect conditions for on-going tracking and measurement of the 'health' of the processes. Since each step, each activity is automatically recorded by the software solution then this data can be made available through dashboards and reports.

No need to equip all AP officers with a Microsoft Band though. An AP automation solution constantly tracks and measures all AP key performance indicators (KPIs) and provides the data via dashboards for real time monitoring of the AP process and reports for in-depth analysis.

Moving from a manual and paper-based AP process to a digitalised and automated AP process creates the opportunity for management to implement clear KPIs for AP officers and for the overall AP process. And since it is well known that 'you can't manage it if you can't measure it', then the new capabilities of tracking and measuring KPIs allow management to drive further productivity and business process efficiency. It's no coincidence that the highest performing AP departments are exceptional in the very areas that automation is known to improve.

Here are some KPIs typically used to track the health of your AP processes and the benefits you can achieve. These KPIs are time consuming to measure in a manual paper-based AP process and readily available with an automated AP solution:

1. Measure the number of invoices processed by each AP officer. This metric can change significantly after automating your process. It also helps identify any further training need.

2. Measure the processing cost of each invoice. Start to add up such costs for just one invoice, and you have yourself one expensive AP process.

3. Measure the timeliness of your payments. You want to have a good relationship with your vendors so that you can be in a good position to negotiate, get discounts and avoid penalties.

4. Are you entitled to any discounts for early payments? Then measure your captured discounts.

5. Measure your level of automation already implemented. Sorry, email doesn't count as automation…

6. How many invoices do you pay twice or multiple times? With automation, this figure will be down to zero.

7. Calculate the percentage of duplicate invoices received (and hence not processed twice and, more importantly, not paid twice).

After assessing the health of your current AP process with these 7 KPIs, you might want to improve them by automating your AP process. As you follow the way to automation, you will be able to use this first assessment to measure your progress. Indeed, you can compare your KPIs before automation and with automation. Dashboards and reports integrated in your AP automation solution will help you do so.

Dashboards provide every user (AP officer, AP Manager, Finance Director, CFO) with readily available information needed to perform their daily tasks, monitor performances, and spot problems or opportunities as soon as they arise, making every action smarter and more effective.

Users can effortlessly access the right information when they need it. Packaged KPIs and dashboards remove headaches for IT. Based on best practices and industry standards, these metrics perfectly meet the needs of AP workflow users.

Looking for additional, more specific indicators? Choose a solution with an easy-to-use interface that allows you to choose what you want to display and to which user or profile. And, you are free to remove, edit or add other indicators to your dashboards. Reports can be run or scheduled to see how many pending invoices are waiting to be processed and how much cash they account for. Vendor invoices reports (e.g., invoices pending approval, invoices by status, number of invoices processed by full-time employees, etc.) can be run from the interface, along with the option to build your own reports.

You can also automatically provide regular reporting to managers. You only need to define when, at what frequency, and to whom a report needs to be automatically emailed. Remember, "If you can't measure it, you can't manage it."
These 7 essential KPIs, combined with dashboards and reports, will help you effectively manage your Accounts Payable processes.
*www.apinthecloud.com.au*

Christophe DuMonet is Managing Director of Esker ANZ.

# Increasing invoice volume challenges Accounts Payable departments: IFO

**Accounts payable operations are seeing their invoice volumes increase, signalling improvements in revenue, but they're not celebrating just yet. That's because they're bogged down in manual, paper-based processes instead of taking full advantage of automation. Those are among the findings of the 2014 AP Automation Study by The Institute of Financial Operations, which surveys accounts payable professionals internationally every year about the use of the latest forms of technology.**

"AP professionals are being called on to do more cash management analysis and financial predictions than ever before, but they're still handling the basic fundamentals of the job with manual tools," said Ken Brown, the IFO's executive director. "The good news is that executives at the highest level are becoming more aware of the efficiencies automation can bring to the process."

Only about 9 percent of respondents reported that their operations are highly automated, which the study defined as receiving less than 10 percent of their invoices on paper. Three times as many (29 percent) said paper accounts for more than 90 percent of the invoices they receive.

Among other key findings of the study:

• Cheques remain the most common payment method in business-to-business transactions, accounting for 50 percent of payments among the organizations of survey respondents — about the same percentage reported in the 2013 study.

• Electronic invoicing is keeping costs down. Of respondents who use this form of payment technology, 43 percent said their average e-invoice cost is less than $US2, compared with 19 percent who have been able to keep their cost that low processing paper invoices.

• As the use of new technology grows, respondents are seeing decreases in error rates in their invoice entry and payment processes. About 40 percent cited decreases for 2014, compared with 30.9 percent a year ago.

• The process of data entry, validation, and approval for incoming invoices is taking less time. About 72 percent of respondents said it takes them five days or fewer. In fact, 10 percent reported it takes them less than a day, and 9 percent said it takes less than an hour.

• Optical-character recognition (OCR) technology is gaining ground. The survey shows an increase in its use to 38 percent, compared with 23 percent a year ago.


• The use of front-end scanning to extract data from documents has grown slightly in the past year. About 22 percent of respondents cited it, compared with 19.5 percent a year ago. However, the percentage of respondents who said their departments don't use capture technologies remained unchanged at 25.6 percent since the 2013 study.

• Supply chain financing seems to be increasing in use. About 13.7 percent of respondents said their organizations have turned to this cash management tool, compared with 8 percent in 2013.

"Although the adoption of automation has shown steady growth among organizations, a lack of sponsorship and conflicting business priorities still remain an impasse to wider acceptance of this technology," said Warren Glick, Director, Corporate Marketing, at survey sponsor ACOM Solutions.

"AP professionals have turned the corner in 2014, with a clearer understanding of manual processing and its effect on resources, productivity, and the overall cost burden to the organization. Successful companies need to be equipped with automation tools that come with a serious "hard cost" ROI. Tools that enable them to achieve their forecast and cash management goals, while enabling staff to move to higher value tasks. I think this year's AP Automation Study really speaks to this."

## EzeScan

*Phone: 1300 393 722*
*Fax: (07) 3117 9471*
*Email: sales@ezescan.com.au*
*Web: www.ezescan.com.au*

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 eDOCS/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.

## ABBYY

*Phone: (02) 9004 7401*
*E-mail: sales@abbyy.com.au*
*Web: www.abbyy.com.au*

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.

## Kodak alaris

*Contact: Francis Yanga*
*Email: francis.yanga@kodakalaris.com*
*Tel: 03 9020 6540*
*www.kodak.com/go/di*

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

*Phone: 1800 065 640*
*Email: enquiries@objective.com*
*Web: www.objective.com*

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

*Tel: (03) 9017 4943*
*Email: info@kapish.com.au*
*Web: http://kapish.com.au/*

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 record keeping a breeze.

## Glentworth Consulting

*Tel: 1300 634 430*
*Email: Procurement@glentworth.com*
*Web: www.glentworth.com*

Glentworth is an information management consultancy with a core focus on shifting the way information is used to create value. The Glentworth team specialise in understanding business challenges and solving them through galvanising data, information and knowledge within organisations.

Through enabling organisations to increase the value they gain from their information, this increases productivity, promotes growth, reduces transactional costs and enables process optimisation.

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.

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

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. This allows informed decision making and the right techniques to help achieve the outcome.

Glentworth is a trusted partner of organisations across the government, commercial and not-for-profit sectors.

## Information Proficiency/Sigma Data

*Tel: 8 6230 2213*
*Email: info@sigmadata.com.au*
*Web: infoproficiency.com.au/ sigmadata.com.au*

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.

## Nuix

*Phone: 61 2 9280 0699*
*Email: sales@nuix.com*
*Website: nuix.com*

Nuix enables people to make fact-based decisions from the content of unstructured data. The patented Nuix Engine is the world's most advanced technology for accessing, understanding and acting on human-generated information. Our unique parallel processing and analytics capabilities make small work of big data volumes and complex file formats. Organisations around the world turn to Nuix software when they need fast, accurate answers for digital investigation, cybersecurity, eDiscovery, information governance, records management, email migration and privacy. And the list of uses is always growing because our customers expect us to make the impossible possible.

## Epson

*Contact: Mark Gent*
*Phone: 0417 367 567*
*Email: mgent@epson.com.au*
*Web: www.epson.com.au/products/scanners*

Epson is a global innovation leader dedicated to exceeding expectations with solutions for markets as diverse as the office, home, commerce and industry. Epson's advances in scanning technology deliver the perfect balance of speed and reliability for image reproduction of unbeatable quality. From compact mobile scanners to A3 flatbed scanners that operate at speeds up to 70ppm, the range is designed for a variety of demanding organisations where fast and easy document management is required. Combine that with high productivity software that allows networking and 'scan to' options including the cloud, its versatile functions dramatically expand data usability and online document workflow. A high quality scanner is a powerful tool. For unbeatable reproduction of photographs, documents and graphics, you can't do better than the Epson scanner range - outstanding results, simple operation and value for money.

## iCognition

*National Hotline: 1300 00 4264*
*Telephone: +61-2 6257 4264*
*Facsimile: +61-2 6230 4264*
*Email: info@icognition.com.au www.icognition.com.au, www.diemsolutions.com*

iCognition is an Australian company delivering specialist consultancy, implementation and managed services centred on Information Management and Governance, particularly around HP TRIM/Records Manager. The company provides consulting, strategy development, innovative solutions, systems integration, product development, implementation and managed services that cover strategic and project level services. As a HP Gold Partner we are certified to provide HP TRIM/ Records Manager technical and business services, including HP TRIM upgrades and support. We are also an Intelledox Partner and a Microsoft Silver Partner focused on SharePoint. As a HP Alliance One Partner we develop the Diem Solutions that add value to HP TRIM. Our flagship products, Diem Portal and Diem Broker, are designed to maximise the efficiency, effectiveness and satisfaction in capturing, discovering, managing and collaborating around corporate information.

## OPEX Corporation

*Contact: Jon Stevens*
*Phone: +1 856.727.1100 Fax: +1 856.727.1955*
*Web: www.opex.com/contact/sales-contact/*

OPEX Corporation is a recognised global technology leader in document imaging, high-speed mailroom automation and material handling. Since 1973, OPEX systems have provided performance enhancing workflow solutions and cost-effective results to thousands of organisations worldwide.

OPEX systems are designed for a wide variety of industries including financial services, insurance, healthcare, government, retail, non-profits, utilities, telecommunication, service bureaus, educational institutions, and fulfilment operations.

OPEX has developed innovative prep reducing scanners that address the root causes of workflow issues our customers face. Minimising preparation, paper handling, and other manual tasks not only improves efficiency, but also results in superior transaction integrity and information security.

As documents are removed from envelopes/folders and scanned, operators can view each image to ensure it is properly captured. This prevents time-consuming and costly re-scanning later in the process. Moving image capture upstream also reduces information management risks.

## IQX Business Solutions

*Phone: +61 2 8007 4790*
*Email: sales@iqxbusiness.com*
*Web: www.iqxbusiness.com*

IQX provides user friendly business process solutions, predominantly for SAP customers. We deliver Microsoft SharePoint Apps, Excel Apps, and Mobile Apps delivering end-to-end business processes spaning application and organisational boundaries that users love. IQX solutions are unique in their ability to extend SAP processes to include supporting documents and external parties whilst presenting functionality in familiar formats.

With deep experience in SAP integration, IQX has the people, products and passion to help your users see, share and do more. Our relevance to the IDM audience is our unified task approval tool, OneList Approvals, which combines SAP, Oracle, Microsoft and other system workflow tasks with all the supporting documentation, across multiple back-end applications, into one list, regardless of where you are.

It provides notification of all SAP and non-SAP tasks, access to the associated workflows and relevant documentation into one, simplified list for approval, across your mobile device, desktop and/or email client. For more information please see www.onelistapprovals.com.

## Aleka Consulting

*Ph: 0414 243 614*
*Web: alekaconsulting.com.au*
*Email: info@alekaconsulting.com.au*

With a unique knowledge base in text analysis and storage technology, Aleka provides products and services to let users work more effectively with email, electronic documents and document management systems.

**FindAlike** – Office Add-in using near-matching technology to find email recipients and senders for the same message, find different versions of the same document, and suggest record keeping containers based on content.

**AK Disposal View** – Web-based access to disposal authorities to minimise 'donkey vote' filing.

DMS Health Check – find misfiled documents in your DMS

**Mailing List Cleaning** - identify different name/address representations, dead and relocated recipients and save postage.

Storage Audit and Remediation – find out what and who is filling your storage and painlessly reduce it.

**SharePoint Migration** – much more than drag and drop! Flatten folder trees, de-duplicate, deal with naming rules, map permissions.

**Facet Folders** – metadata-based browsing of disordered data.

Rule-based Sentencing – apply rules to file names, folder names and text content to speed document sentencing.

# IMAGING SERVICES BUREAU 2015

**The IDM Imaging Service Bureau Directory for Australia and New Zealand provides a comprehensive guide for all your document outsourcing needs. Visit online for regular updates and detailed serch functionality at https://idm.net.au/imaging-service-bureau**

## AMS Imaging

*230 Bank Street*
*South Melbourne Victoria 3205*
*Additional Locations:*
*Phone: 03 9690 6800*
*Fax: 03 9696 3865*
*Website: http://www.ams-imaging.com.au*
*More information: davidw@ams-imaging.com.au*

### Document Scanning Services

*Scan OCR Hand A3+ CAD Micro ApCard Book Photo*

### Service Offerings

*Ret SoD Form Host Class Mail On-Site Lit*

### Specialised Services

*HR AP Law Med De Sch Dra*

Australian Microfilm Services/AMS Imaging is an ISO accredited service bureau that has provided specialised document imaging and records management for over 40 years.
Our services include;
active and archive imaging where we can provide digital images for day to day use along with the security of a long term backup format;
high speed scanning of business records in colour or black and white to searchable archive format PDFs;
AMS produce images that comply with PROV Digitization image requirements;
AMS offer OCR/IMR and Forms Processing;
Business Process Outsourcing of your Mailroom;
We can convert microfilm, microfiche and aperture cards back to digital format;
AMS has the necessary experience to handle sensitive and heritage materials;
Large format plans, drawings and artworks can be imaged in colour, greyscale or black and white;
Small format can be done to PROV specifications in colour or black and white;
Bound books and volumes can be imaged. This can include an archival copy on microfilm if required;
AMS can provide VERS compliant records management software or on-line hosting of your data;
AMS can provide APROSS approved storage where you want to hold onto the originals to meet your long term disposal schedules;
We are a certified ELO Business Partner. Offering Compliant Document Management Software, Accounts Payable Automation and integrations services for your ECM system.
AMS can provide Cloud based document management

## BRIZ SCAN

*34 High Street*
*Forest Lake QLD 4078*
*Additional Locations:*
*Phone: 07 3879 6915*
*Fax: 07 3879 6915*
*Website: http://www.brizscan.com.au*
*More information: peter@brizscan.com.au*

### Document Scanning Services

*Scan OCR Hand Photo*

### Service Offerings

*Ret SoD Form Host On-Site Sale*

### Specialised Services

*HR AP Law Med De Sch*

BRIZ SCAN - specialists in Document scanning bureau services. Our services meet and exceed the guidelines outlined by The Queensland State archives for the Digitisation of paper records.
BRIZ SCAN is an approved GITC (Government Information Technology Contracting) vendor - GITC Number Q-5067
BRIZ SCAN is an approved QAssure (Chamber of Commerce & Industry Queensland) accredited vendor - QAssure Number: 10103
BRIZ SCAN are long term suppliers of Premium Imaging Equipment, Consumables and software to Queensland State Government departments, Local Councils and Businesses.
BRIZ SCAN are accredited Kodak Capture PRO software resellers.
BRIZ SCAN offer short and long term rental of high speed imaging equipment as well as sales of Kodak, Canon, Fujitsu and ColorTrac wide format Plan scanners.

- We offer full service to our clients to include:
- Consultation;
- Confidentiality Agreements;
- Document pick up;
- Scanning from Business card to A3;
- OCR images for text searchable documents;
- Document storage for short term;
- Data storage;
- and Document destruction

## DatacomIT

*70 Dorcas St*
*Southbank VIC 3006*
*Additional Locations:*
*Phone: (03) 9522 2000*
*Fax: (03) 9522 2099*
*Website: http://www.datacomit.com.au*
*More information: http://www.datacomit.com.au/contact-us/*

### Document Scanning Services

*Scan OCR A3+ Micro ApCard Book Photo*

### Service Offerings

*SoD Form Host Class Mail On-Site Sale*

### Specialised Services

*HR AP Law Med De Sch Dra*

DatacomIT is a Global leader in the delivery and support of ICT solutions to Industry, Education and Government, with over 30 years' experience available to support your Information Technology environment.
DatacomIT is an innovative and progressive Information Communications Technology Company, whose team has earned long-standing credibility within the industry, based on over thirty years' of quality service. Our high degree of expertise in the area of ICT allows us to consistently provide our clients with cost-effective solutions that make use of the best available technology.
ICT is a rapidly advancing field that provides many challenges. DatacomIT consistently meets these challenges by responding proactively to change, with a clear determination to deliver the most efficient and effective solution available.
Quality Assurance - Our solutions are produced accurately and efficiently, guaranteed by the assurance of DatacomITâ€™s quality management system and procedures, which comply with ISO 9002 standard.
DatacomIT is a provider of specialised digitisation services.
We:

- Scan all formats of microform (fiche, film, aperture cards;
- Scan books and bound records of all shape and sizes up to AO in size;
- Specialise in the digital preservation of rare, fragile and historical material;
- Scan large format maps and documents;
- Scan all file formats;
- Extract data from scanned images for indexing, search ability, and XML Conversion;
- Provide data processing and forms processing services;
- Provide data conversion and data migration services;
- We also sell a large range of book and microform digitisation equipment.

## Legend

### Document Scanning Services

| | |
|---|---|
| Scan to image | Scan |
| Data Capture/OCR | OCR |
| Handwriting recognition H | and |
| Large format (above A3) | A3+ |
| CAD Conversion | CAD |
| Microform Conversion | Micro |
| Aperture card conversion | ApCard |
| Book/Bound Volume Scans | Book |
| Photograph, Slide and Negatives | Photo |

### Service Offerings

| | |
|---|---|
| Document Retention & Destruction Management | Ret |
| Scan on Demand | SoD |
| Forms Processing | Form |
| Hosted Document Management | Host |
| Automated indexing, classifying | Class |
| Mailroom & Mail Handling | Mail |
| On-site scanning | On-Site |
| Litigation Support Services | Lit |
| Scanner Sales & Rental | Sale |

### Specialised Services

| | |
|---|---|
| HR documents and staff records | HR |
| Invoices/Accounts Payable | AP |
| Legal records | Le |
| Medical records | Me |
| Delivery documents | De |
| School records | Sch |
| Drawings and technical | Dra |
| Library/history archives | Lib |

## Decipha

*1D Marine Parade*
*Abbotsford VIC 3067*
*Additional Locations:*
*Keswick SA, West End QLD, Canberra ACT, Belmont WA*
*Phone: 1300 559 195*
*Fax: 03 9403 8145*
*Website: http://www.decipha.com.au*
*More information: http://www.decipha.com.au/contact-us/*

### Document Scanning Services

*Scan OCR*

### Service Offerings

*SoD Form Host Class Mail*

### Specialised Services

*HR AP Law Med De Sch Lib*

Decipha, a business of Australia Post, was established in 1996 to deliver outsourced mailroom services. Since 2002, we've pioneered the development of electronic information processing technologies and services in Australia, building a base of long term, satisfied clients. Today, we employ more than 650 staff and offer national service capability to more than 100 customers.

**Information management (Decipha)**

Decipha's inbound information management service, designed to help you deal with both physical and electronic incoming information. Suitable for a wide range of organisations, including federal and local government, major financial institutions and well-known manufacturers and retailers, we can tailor Decipha's services to meet your specific business needs.

**Efficient ways to manage incoming information**

Decipha draws on a broad range of technologies and extensive experience to customise incoming information management solutions. We manage both physical and virtual mailrooms, using quality assured processes and expert staff. We scan physical mail and use a wide range of technologies to accurately capture information, images and relevant data from both structured and unstructured forms. We also develop online forms that enable user-generated information to be captured and validated. We securely track and expedite the handling of financial data and payments, and can scan and archive data in ways that make it easily retrievable.

## Desktop Imaging

*32b Jamaica Drive*
*Grenada North Wellington 5208*
*Additional Locations:*
*Christchurch / Auckland*
*Phone: 0508 337586*
*Website: http://www.desktopimaging.co.nz*
*More information: http://www.desktopimaging.co.nz/Contact.html*

### Document Scanning Services

*Scan OCR Hand A3+ CAD Micro ApCard Photo*

### Service Offerings

*Ret SoD Form Host Class Mail On-Site Sale*

### Specialised Services

*HR AP Law Med De Sch Dra Lib*

**1. Data Capture (Scanning) Services -** Turn your documents into searchable, retrievable electronic data. Advantages include less storage space, increased productivity, and improved bottom line.

**2. Business Process Solutions On-site/Off-site** - Transform complex data capture and translate to simple and easy to read formats. Extracting relevant information can empower you to access data that will improve systems, develop better business workflow, increase productivity and save money. Automated Capture solutions that transform or improve existing business process can include, accounts payable, human resources, contract management, digital mailroom, forms processing, survey and stocktake forms.

**3. Professional Services/Consultancy -** Looking for help with a system conversion and or migration? Want to integrate data capture and conversion with your core systems? Odds are we can help using our development resources.

Distributors of: PSI:Capture (www.psigen.com)
Resellers for: Filebound (www.filebound.com.au)
Distributors of: OPEX Scanning and Mailroom Equipment (www.opex.com)

## e.law International

*Level 20 MLC Centre, 19-29 Martin Place*
*Sydney NSW 2000*
*Additional Locations:*
*Brisbane, Melbourne, Perth*
*Phone: 1300 136 993*
*Fax: (02) 8114 1798*
*Website: http://elaw.com.au*
*More information: contact@elaw.com.au*

### Document Scanning Services

*Scan OCR Hand A3+ Book*

### Service Offerings

*SoD Host Class On-Site Lit*

### Specialised Services

*Law*

e.law is a privately owned consulting, litigation support and legal technology service provider offering specialised products and services to many of the world's largest legal, corporate and government organisations.

The bureau team at e.law carries out a number of document management services to corporations and corporate legal departments including legal & commercial copying, printing, scanning, delimiting and coding. e.law also has offices in Asia and can assist in your litigation and document management needs within the Asia region.

Our document management systems enables automatic document scanning, recognition, storage, archiving, retrieval and delivery of all your business documents. Document management software or paperless office technology, replaces paper-based processes with electronic procedures, eliminating the printing, posting and manual filing of paper documents.

All documentation processed is thoroughly checked by our experienced document manager and bureau teams and document management systems to ensure the highest accuracy levels are achieved every time.

Reasons for choosing the bureau services at e.law for your document management:

- Provide an easy to use online ordering & tracking system
- Experienced project managers & document manager
- Customisable interactive PDF order forms
- We provide both onsite and offsite support
- we are the only service provider in the Asia Pacific region who can provide onsite services throughout Asia
- We pride ourselves on friendly, responsive, reliable service.

# IMAGING SERVICES BUREAU

## Fuji Xerox Australia

*Level 5, 26 College Street*
*Sydney NSW 2000*
*Additional Locations:*
*Mayfield West, NSW; Moorebank NSW; Ravenhall, VIC; Melbourne VIC; Parkinson, QLD; Barton ACT; Darwin, NT; Bassendean, WA; Torrensville, SA.*
*Phone: 13 000 39 367*
*Website: http://www.dms.fujixerox.com/en*
*More information: http://www.dms.fujixerox.com/en/contact/*

### Document Scanning Services

*Scan OCR Hand A3+ CAD Micro ApCard Book Photo*

### Service Offerings

*Ret SoD Form Host Class Mail On-Site Lit*

### Specialised Services

*HR AP Law Med De Sch Dra Lib*

Fuji Xerox Australia has a team of people who truly understand the value of documents, and the most effective ways to look after them, from conception to long-term archival. Our document management processes give you easy access to your library of documents, including invoices, application forms, HR records, legal contracts and technical documents. They assist you to share information with colleagues, store and retrieve them quickly when you want them, and archive them when they are no longer needed. All these services are flexible, so they can be customised to suit your particular requirements. They are also scalable, so they can grow with your organisation and continue to meet your needs. And they are secure, so you can be certain that all your documents are safe in your own environment, at one of our state of the art processing centres, or a combination of both. Fuji Xerox Australia has over 10 years' experience measuring and analysing mailroom activities, and devising solutions that can both improve operations and cut costs associated with mail and distribution. By assessing your current operations, we can identify areas where you can cut costs, and make recommendations on how to get your mail flowing smoothly through improvements in handling, storage and distribution.

## Iron Mountain

*Level 1/785 Toorak Road*
*Hawthorn East VIC 3123*
*Additional Locations:*
*Phone: 1800 476 668*
*Fax: 03 9793 1184*
*Website: http://www.ironmtn.com.au*
*More information: http://www.ironmtn.com.au/Contact-Us.aspx*

### Document Scanning Services

*Scan OCR Hand A3+ CAD Book*

### Service Offerings

*Ret SoD Form Host Class Mail*

### Specialised Services

*HR AP Law Med De Sch Dra Lib*

We use experience and technology to reduce time and cost, to digitise and process inbound information, speeding up processing times to deliver tangible benefits to you and your customers.

- Bulk scanning of archives and unusual formats
- Same-day scanning of new documents
- Extract - automatic text recognition and extraction from forms, barcodes and handwriting
- Sort - Automatic document recognition and classification
- Interfaces with most document management systems
- PCI compliant environment and systems
- Global best-practices for security, handling, access and compliance
- Online hosting - secure web access to your scanned documents
- On-demand scanning of lodged paper records

Utilising world-leading technology, Iron Mountain's techniques for automatically extracting data from digital records can change the information management paradigm in your organisation. With automatic document classification and data extraction, we are able to simplify the myriad streams of incoming data to your organisation, whether it be in paper, fax, email or other formats, and deliver this as enriched information, directly to the appropriate business process engine, ready to be actioned by todayâ€™s knowledge worker. You will not only reduce the costs in receiving inbound information, but also reduce your processing cycle times, delivering tangible benefits to your organisation

## Recall Australia

*697 Gardeners Road*
*Alexandria NSW 2015*
*Additional Locations:*
*Phone: 13 RECALL*
*Website: http://www.recall.com.au*
*More information: moreinfo@recall.com*

### Document Scanning Services

*Scan OCR Hand A3+ CAD Micro Book Photo*

### Service Offerings

*Ret SoD Form Host Class Mail On-Site*

### Specialised Services

*HR AP Law Med De Sch Dra Lib*

Recall is a worldwide industry leader in Information Management Solutions with over 30 years' experience in successfully delivering cost-effective outsourced relocation, archive, destruction, scanning, digital workflow, document and media tape management services. Our high quality procedures and state-of-the art technologies, resources and facilities, ensure Recall continually provides best practice information management solutions to our customers. Recall operates in over 300 facilities in 23 countries with over 5,000 Recall employees servicing approximately 80,000 customers worldwide. In Australia, Recall operates over 47 facilities, servicing over 10,000 customers with over 500+ employees.
Recall's comprehensive approach to solving your digital document management objectives begins with an analysis of your Technical and Business Requirements. We then take this information – in conjunction with our industry expertise – and plan, design, and propose a tailored document management solution which includes a schedule for implementation, collective measures of security and criteria for success.
The solution we propose might include one or a combination of these services and/or offerings:

- Mail Room Services – Handling incoming documents in preparation for digitisation.
- Data Capture – High-quality, high-speed Optical Character Recognition (OCR) and keying activities to extract essential data for activities such as form processing.
- Imaging – Conversion of paper to electronic images for storage, preservation and workflow purposes.
- ReView Powered by OnBase – Recall's industry-leading, secure, web-based system that enables capturing, storing, routing and accessing data images for workflow applications.

ReQuest Web – Recall's web-based, inventory-management tool

## Acrodata

*Ground floor, 47 Sandy Bay Road*
*Hobart Tasmania 7000*
*Additional Locations:*
*Phone: 1300 227 632*
*Website: http://www.acrodata.com.au*
*More information: info@acrodata.com.au*

### Document Scanning Services

*Scan OCR Hand A3+ CAD Micro ApCard Book Photo*

### Service Offerings

*Ret SoD Form Host Class Mail On-Site Lit*

### Specialised Services

*HR AP Law Med De Sch Dra Lib*

## ADEC Preview

*13-15 Smith Street*
*Chatswood NSW 2067*
*Additional Locations:*
*Phone: (02) 9418 7822*
*Fax: (02) 9418 7833*
*Website: http://www.adecpreview.com.au*
*More information: sales@adecpreview.com.au*

### Document Scanning Services

*Scan OCR*

### Service Offerings

*Mail*

### Specialised Services

*AP Law*

## Legend

### Document Scanning Services

| | |
|---|---|
| Scan to image | Scan |
| Data Capture/OCR | OCR |
| Handwriting recognition H | and |
| Large format (above A3) | A3+ |
| CAD Conversion | CAD |
| Microform Conversion | Micro |
| Aperture card conversion | ApCard |
| Book/Bound Volume Scans | Book |
| Photograph, Slide and Negatives | Photo |

### Service Offerings

| | |
|---|---|
| Document Retention & Destruction Management | Ret |
| Scan on Demand | SoD |
| Forms Processing | Form |
| Hosted Document Management | Host |
| Automated indexing, classifying | Class |
| Mailroom & Mail Handling | Mail |
| On-site scanning | On-Site |
| Litigation Support Services | Lit |
| Scanner Sales & Rental | Sale |

### Specialised Services

| | |
|---|---|
| HR documents and staff records | HR |
| Invoices/Accounts Payable | AP |
| Legal records | Le |
| Medical records | Me |
| Delivery documents | De |
| School records | Sch |
| Drawings and technical | Dra |
| Library/history archives | Lib |

## Advance RM

*140 Broderick Road*
*Corio VIC 3215*
*Additional Locations:*
*Phone: 1300 132 241*
*Fax: (03) 5274 2011*
*Website: http://advancerecords.com.au/*
*More information: http://www.advancerecords.com.au/contact-us*

### Document Scanning Services
*Scan OCR Hand A3+ Book*

### Service Offerings
*Ret SoD Form Host Class Mail On-Site*

### Specialised Services
*HR AP Law Med De Sch Lib*

## Books2ebooks

*38-42 Cremorne Street*
*Richmond Victoria 3121*
*Phone: 0418 327 555*
*Fax:* 03 9427 7953
*Website: http://books2ebooks.com/*
*More information: sales@books2ebooks.com*

### Document Scanning Services
*Book*

### Service Offerings
*SoD Form Host Sale*

## Branca Micrographics

*4/24 Elizabeth St*
*Wetherill Park NSW 2164*
*Additional Locations:*
*Phone: 02 9756 1160*
*Fax: 02 9756 4246*
*Website: http://www.branca.com.au*
*More information: info@branca.com.au*

### Document Scanning Services
*Scan OCR Hand A3+ Micro ApCard Book Photo*

### Service Offerings
*SoD Form Host Class On-Site Sale*

### Specialised Services
*HR AP Law Med De Sch Dra*

## Brisbane Colour

*Ground floor 360 Queen Street*
*Brisbane QLD 4000*
*Additional Locations:*
*Phone: (07) 3229 6044*
*Fax: (07) 3221 5771*
*Website: http://bcolour.com.au/*
*More information: info@bcolour.com.au*

### Document Scanning Services
*Scan OCR A3+*

## Computershare

*452 Johnston Street*
*Abbotsford VIC 3067*
*Additional Locations:*
*Port Melbourne VIC, Ermington NSW, Osborne Park WA, West End QLD.*
*Phone: 03 9415 5000*
*Fax:*
*Website: http://www.computershare.com.au/ccs*
*More information: http://ross.ingleton@computershare.com.au*

### Document Scanning Services
*Scan OCR Hand A3+*

### Service Offerings
*Ret SoD Form Host Class Mail*

### Specialised Services
*AP Med De*

## Converga

(Head Office) Unit 16, 39 Herbert Street
St Leonards NSW 2065
Phone: 1300 557 672
Fax: (02) 9437 0400
Website: http://www.converga.com.au
More information: http://www.converga.com.au/contact-us/

### Document Scanning Services
*Scan OCR A3+ Micro ApCard Book*

### Service Offerings
*Ret SoD Form Host Class Mail On-Site*

### Specialised Services
*HR AP Law Med De Sch Lib*

## Dataline Group

*11U/175 Lower Gibbes St*
*Chatswood NSW 2067*
*Additional Locations:*
*Phone: (02) 98826301*
*Fax: (02) 98826306*
*Website: http://www.dataline.com.au*
*More information: sales@dataline.com.au*

### Document Scanning Services
*Scan OCR Hand*

### Service Offerings
*Ret Host Class Mail On-Site*

### Specialised Services
*HR AP De*

## Essential Imaging

*20/ 52-60 Garden Drive*
*Tullamarine VIC 3043*
*Additional Locations:*
*Phone: 03 9335 2335*
*Website: http://www.essentialimaging.com.au*
*wmail: jean@essentialimaging.com.au*

### Document Scanning Services
*Scan OCR Hand A3+ CAD Micro ApCard Book Photo*

### Service Offerings
*Ret SoD Form Host Class On-Site*

### Specialised Services
*HR AP Law Med De Sch Dra*

## File Scan Services

*23/10 Lower River Terrace*
*South Brisbane Qld 4101*
*Additional Locations:*
*Phone: 0417611621*
*Fax: 07 38445533*
*Website: http://www.filescan.com.au*
*More information: cath@filescan.com.au*

### Document Scanning Services
*Scan OCR A3+*

### Service Offerings
*Ret On-Site*

### Specialised Services
*HR AP Law Med De Sch Dra*

# IMAGING SERVICES BUREAU

## Filetek Imaging

*37 Toby Close*
*Charity Creek NSW 2424*
*Additional Locations:*
*Phone: (02) 6550 6515*
*Website: http://filetekimaging.com.au/*
*More information: http://filetekimaging.com.au/02_Pages/04_Contact.html*

### Document Scanning Services
*Scan OCR*

### Service Offerings
*Ret SoD*

### Specialised Services
*HR AP Law Med De Sch*

## Fort Knox

*22 Salta Drive*
*Altona North VIC 3025*
*Additional Locations:*
*Phone: 1300 360 557*
*Fax: 1300 360 558*
*Website: http://www.fortknoxrecords.com.au*
*More information: http://www.fortknoxrecords.com.au/contact-us.php*

### Document Scanning Services
*Scan OCR A3+*

### Service Offerings
*Ret SoD Form Host Class Mail*

### Specialised Services
*HR AP Law Med De Sch Dra*

## Gosford Micrographics

*Unit 1, 5 Bon-Mace Close*
*Berkeley Vale NSW 2261*
*Additional Locations:*
*Phone: +612 4389 8066*
*Fax: +612 4389 8077*
*Website: http://www.gosmicro.com.au*
*More information: gosinfo@gosmicro.com.au*

### Document Scanning Services
*Scan OCR Hand A3+ Micro ApCard Book Photo*

### Service Offerings
*SoD Form Class On-Site*

### Specialised Services
*HR AP Law Med De Sch Dra*

## Grace Information

*Unit 49/45 Powers Road*
*Seven Hills NSW 2147*
*Additional Locations:*
*Phone: 1300 788 211*
*Fax: 02 8824 1799*
*Website: http://www.graceinfo.com.au*
*More information: records@grace.com.au*

### Document Scanning Services
*Scan OCR Hand A3+ CAD Micro Book Photo*

### Service Offerings
*Ret SoD Form Host Class Mail On-Site*

### Specialised Services
*HR AP Law Med De Sch Dra Lib*

## Harrison Data Capture

*3c/10 Ingleburn Road*
*NSW NSW 2016*
*Additional Locations:*
*Vic/SA: 03 9681-7638 WA: 08 9421 1661*
*Phone: 02 96182111*
*Website: http://www.harrisons.net.au*
*More information: prof@post.harvard.edu*

### Document Scanning Services
*Scan OCR Hand*

### Service Offerings
*Ret SoD Host Mail On-Site*

### Specialised Services
*HR AP Law Med De Sch Lib*

## HP Enterprise Services

*353 Burwood Highway*
*Forest Hill VIC 3131*
*Additional Locations:*
*Sydney, Brisbane, Adelaide*
*Phone: (08) 8152 1616*
*Website: http://www.hp.com/services/bps*
*More information: apjbps@hp.com*

### Document Scanning Services
*Scan OCR*

### Service Offerings
*Ret SoD Form Host Class On-Site Sale*

## Lexdata

*23-25 O'Connell Street*
*Sydney NSW 2000*
*Additional Locations:*
*Phone: 02 9231 1440*
*Fax: 02 9231 1446*
*Website: http://www.lexdata.com.au*
*More information: info@lexdata.com.au*

### Document Scanning Services
*Scan OCR A3+ CAD Micro ApCard Book Photo*

### Service Offerings
*SoD Form Host Class Mail On-Site Lit Sale*

### Specialised Services
*HR AP Law Med De Sch Dra Lib*

## LitSupport

*Level 12, 1 Castlereagh Street*
*Sydney NSW 2000*
*Additional Locations:*
*Melbourne, Brisbane, Perth*
*Phone: 1300 LIT SUP (548 787)*
*Website: http://www.litsupport.com.au*
*More information: jerrie_vise@litsupport.com.au*

### Document Scanning Services
*Scan OCR A3+ Book*

### Service Offerings
*Ret SoD Host On-Site Lit Sale*

### Specialised Services
*Law De*

## NZ Micrographics

*32b Jamacia Drive*
*Grenada North Wellington 5249*
*Additional Locations:*
*Auckland, Christchurch, NZMS Wellington - HMIF*
*Phone: 64-4-232-9396*
*Fax: 64-4-232-9399*
*Website: http://www.micrographics.co.nz/*
*More information: http://www.micrographics.co.nz/contact/*

### Document Scanning Services
*Scan OCR A3+ Micro ApCard Book Photo*

### Service Offerings
*SoD Host On-Site Sale*

## Scan Conversion Services

*4 Nelson St*
*Stepney SA 5000*
*Additional Locations:*
*Brisbane, Melbourne, Perth, Sydney*
*Phone: 1300 SCAN IT (1300 7226 48)*
*Website: http://www.scanservices.com.au*
*More information: sales@scanservices.com.au*

### Document Scanning Services
*Scan OCR Hand A3+ CAD Micro ApCard Book Photo*

### Service Offerings
*SoD Form Host Class Mail On-Site Lit Sale*

### Specialised Services
*HR AP Law Med De Sch Dra Lib*

## Scan2Archive

*Level 3, 33-35 Atchison Street*
*St Leonards NSW 2150*
*Additional Locations:*
*Phone: 1300 789 684*
*Fax: 1300 789 684*
*Website: http://www.scan2archive.com.au*
*More information: info@scan2archive.com.au*

### Document Scanning Services
*Scan OCR Hand A3+ Micro ApCard Book Photo*

### Service Offerings
*Ret SoD Form Host Class*

### Specialised Services
*HR AP Law Med De Sch Dra*

## Spielberg Solutions

*Suite 34, Ground floor, 50 St. Georges Tce*
*Perth WA 6000*
*Additional Locations:*
*Phone: 1300 660 173*
*Website: http://www.spielbergsolutions.com.au*
*Email: sales@spielbergsolutions.com.au*

### Document Scanning Services
*Scan OCR Photo*

### Service Offerings
*Ret SoD Form Host Class Sale*

### Specialised Services
*HR AP Law Med De Sch Dra Lib*

## Technological micro Data

*38-42 Cremorne Street*
*Richmond Victoria 3121*
*Additional Locations:*
*Phone: +61 3 9427 7999*
*Fax: +61 3 9427 7953*
*Website: http://www.tmdaust.com*
*More information: sales@tmdaust.com*

### Document Scanning Services
*Scan OCR A3+ CAD Micro ApCard Book Photo*

### Service Offerings
*Ret SoD Host Class Mail On-Site Lit Sale*

### Specialised Services
*HR AP Law Med De Sch Dra*

## The Document Centre

*17 Westbury Road*
*Launceston Tasmania 7250*
*Additional Locations:*
*Service state-wide*
*Phone: 1300 345464*
*Fax: 03 63443595*
*Website: http://www.thedocumentcentre.com.au*
*More information: info@thedocumentcentre.com.au*

### Document Scanning Services
*Scan OCR A3+*

### Service Offerings
*Ret SoD Class*

### Specialised Services
*HR AP Law Med De Sch Dra*

## TIMG

*PO Box 251*
*Alexandria NSW 1435*
*Additional Locations:*
*Phone: 1300 764 954*
*Website: http://www.timg.com*
*More information: http://www.timg.com/get-in-touch*

### Document Scanning Services
*Scan OCR Hand A3+ Book*

### Service Offerings
*Ret SoD Form Host Class On-Site*

# IP Australia gets Connected

**IP Australia has a long history as a user of the Objective ECM. It has also been an early government adopter of the Objective Connect secure file sharing platform to manage the daunting task of managing legal documents between warring parties on patent infringement cases.**

IP Australia is a Commonwealth Australian government agency which grants and administers intellectual property rights for Patents, Trade marks, Industrial Designs and also Plant Breeder Rights for new varieties of plants).

It has over 1,100 staff, predominantly Canberra based with a Melbourne Examination Hub and 300+ Nationwide teleworkers and has been an Objective ECM user since the year 2000. IP Australia is presently underway with Implementing Objective ECM Version 8.0 as part of IP Australia's new consolidated IP Rights System (Rights In One).

Collaboration with international Patent Offices is a major priority, with 2/3 of all worldwide applications lodged in the US and China growing swiftly in importance. IP Australia is also moving away from a large number of bespoke in-house developed applications towards a core IP Rights COTS system from Pega Systems.

IP Australia CIO David Johnson said, "We see in the future that IP Rights activity is a good indicator of the health of an economy and our filings have been going through the roof in the last couple of years. We need to be in a position where we can take on this workload properly and efficiently because there is a degree of competition internationally, where IP creators can choose to have part of the registration process undertaken in other countries. We need to be in a position where we are best able to serve Australian innovators so that the systems we are using are the most efficient possible."

Due to IP law changes in Australia, new provisions were introduced in 2012 regarding the electronic filing of evidence in IP rights opposition cases. IP Australia went to market, selected and implemented the cloud based Objective Connect System to meet this need.

Legislation change required IP Australia to take on the responsibility of serving IP rights opposition legal documents between parties. This led to an increased need to have correspondence and evidence lodged electronically and via an efficient and preferably instantaneous notification method to both parties.

"We had a couple of options, build an in-house system, ask customers to send in evidence on disks or explore a cloud solution," said Johnson.

"A key mandatory requirement was for IP Australia to be able to ensure that data was hosted in Australia, and that Opposition parties could not delete documents.

"Objective changed the functionality of Connect to not allow deletion which was not acceptable for our use nor fit for purpose from our original contracted requirements. Objective worked with us to rectify this functional change.

"Using any "fee for service" cloud product means you don't have complete control over all of the functionality or the future direction of the product."

IP Australia customers are now required to file evidence and other specified documents for oppositions electronically via Objective Connect.

On the IP Australia roadmap is a plan to replace the manual process of transferring documents from Objective Connect to ECM, using Objective Link to automate this stage.

"The use of Objective Connect has freed up staff who use to handle large volumes of paper based evidence lodgements," - David Johnson, CIO, IP Australia.

## Converter for Matter Center for O365

Handshake Software has announced the availability of Handshake Converter, a new product that converts documents and other files from document management systems such as HP iManage, OpenText eDOCS, file shares and others to Microsoft SharePoint, both on premise and online with Office 365.

As a result, the converted documents and files will also work with Matter Center for Office 365, Microsoft's new legal document management and collaboration solution.

Handshake Converter offers:

• SharePoint Site Provisioning: Automatically provisions SharePoint Sites for Clients and Matters based on the law firm's information from practice management systems.

• Document Information: Converts the related document information including custom columns from iManage, eDOCS, and other document and file shares systems.

• Security: Converts complex and multiple security scenarios including Access Control Lists, ethical walls and individual document security.

• SharePoint Compatibility: Transforms file names and folder names from legacy systems to ensure compatibility with SharePoint naming convention and allowed characters.

• Flexible Migration: Supports multiple conversion strategies including hybrid environments and on-the-fly conversion.

Handshake supports conversion strategies that suit firm requirements by, for example, converting one office at a time or one practice area at a time. Handshake Software products can bridge the two systems providing a combined Client-centric or Matter-centric view for lawyers of documents in Matter Center and in the Legacy document management system.

## SharePoint App for Documentum

Enterprise Content Management consultancy group Informed Consulting has launched an app to provide connection and integration between Microsoft SharePoint and EMC's Documentum.

SPA4D will allow organisations to connect the enterprise information in Documentum to the SharePoint user interface. This empowers their employees to collaborate on enterprise controlled documents as they would with any other SharePoint content using the tool of their choice.

By exposing enterprise information stored within Documentum using the familiar SharePoint user interface, organizations will be able to balance the demands and needs of different user groups all within the same user interface.

*http://www.spa4d.com*

## SnapDoc mobile Smart Capture

Ephesoft has unveiled a mobile addition to the Smart Capture document capture platform, SnapDoc, that enables browsing or capture of documents from a mobile device from where they can be sent directly to a batch class, have data extraction performed or generate XML and PDF files on the fly.

This app is also free for anyone with an existing Ephesoft Enterprise license.

"Using mobile devices for capture is becoming mainstream for many businesses, so Ephesoft developed their free mobile app to make it easy to address that market need," says Don Field, Ephesoft CEO. "It's easy to use, but still a powerful addition to our Enterprise Edition solution."

The SnapDoc app is compatible with both Android and iOS platforms. It can be integrated inside the Ephesoft Cloud or during on-premise installation of Ephesoft Enterprise. SnapDoc also delivers real-time OCR feedback from your device, including validation and correction of any errors.

*www.ephesoft.com*

## Kodak Alaris Mac-enables 13 photo and document scanners

Kodak Alaris has launched free Mac drivers for 13 of its high-performance document and photo scanners to make them compatible with Apple's OS X operating system as well as Windows and Linux.

As part of the free Mac driver download, Kodak Alaris is also including Newsoft's Presto! PageManager version 9, which integrates Kodak Alaris' Perfect Page image processing. The software allows users to create, edit and manage PDF files without requiring other applications or file conversion software.

The following scanners from Kodak Alaris are now compatible with MAC computers:

Desktop – the Kodak SCANMATE i940, i1150 and i1180 Scanners, as well as the Kodak i2000 Series Scanners. The i2000 Series features a "stow-or-go" design, which allows users to store the scanner upright when not in use and pull it out for scanning as needed so it doesn't interfere with daily activities.

Production – All Kodak i3000 Series Scanners, including the i3450, an A3 low-volume production scanner with integrated A4 flatbed built in.

Photo scanning – both Kodak Picture Saver Scanner Systems, the PS 50 and 80, which allow users to scan up to 85 photos a minute .

Links to the download pages can be found at www.kodakalaris.com/go/macscannernews. MAC drivers for the KODAK Picture Saver Scanning System PS50 and PS80 are available at www.kodakalaris.com/go/macdrivernews.

## Policy Patrol 10 boosts email security

Red Earth Software has released Policy Patrol version 10, the latest version of its email security software for Microsoft Exchange Server. Policy Patrol 10 offers increased protection from email security risks with improved anti-phishing and integrated multi anti-malware scanning, along with an improved user interface and new dashboard.

Policy Patrol 10 includes a new real-time phishing block list, and can use DMARC policies when detecting spoofed emails in order to reduce the potential for email-based abuse. To boost protection against email-borne malware, Red Earth Software has teamed up with OPSWAT, the developers of Metascan technology.

With integrations to both Metascan on-premise and Metascan Online, Policy Patrol provides advanced threat protection by scanning email attachments with multiple (between 4 and 40) anti-malware engines, significantly increasing the malware detection rate. Metascan technology can also provide attachment sanitization and file type verification, preventing zero-day and targeted attacks.

With the release of Policy Patrol version 10, Red Earth Software is now offering a free 10-user version of Policy Patrol Mail Security to provide small companies with robust protection for their Exchange Server. Customers can also obtain a free Metascan Online subscription to begin using multi-scanning as part of their email protection.

Mike Spykerman, CEO of Red Earth Software said: "With this new release of Policy Patrol, we are bringing email security to the next level. With increasingly sophisticated phishing and email malware attacks, defenses need to be one step ahead of the attackers.

"By partnering with OPSWAT for anti-malware protection and continually improving Policy Patrol's anti-phishing technology, we are now able to provide our customers with significantly increased email protection."

*http://www.policypatrol.com*

## Aconex launches connected BIM for project-wide collaboration

Aconex, provider of the cloud collaboration platform for the global construction industry, has launched Aconex Connected BIM. This new product extends the Aconex platform to manage building information modeling (BIM) data and processes for project-wide collaboration between design and construction teams and handover to the owner

"BIM and VDC are transforming the way that capital projects are delivered," said Rob Phillpot, senior vice president of product and engineering and co-founder of Aconex.

"The industry is moving rapidly from 2D drawings and files to multidimensional models and data, as BIM adoption accelerates globally. On many projects today, its use is limited to designers with specialized modeling tools during the design phase of the project.

"While BIM improves design and constructability, the other 90% of the project team are disconnected from model data during the construction and handover phases.

With Aconex Connected BIM, designers for specific disciplines can create and modify models in their native authoring tools and use simple software plug-ins to publish them in the Aconex BIM Cloud. On the platform, all members of the project team – other designers, engineers, consultants, contractors, subcontractors, and owners – can view, distribute, mark up, and contribute to model data at the object level. This coordinated process supports timely detection of clashes and optimizes constructability.

As the project moves through design and into construction, team members can link each object in the model with relevant project documents, communications and workflows.

For example, a mechanical subcontractor can tag a pump with an operating manual or a commissioning sheet. Project team members can issue an RFI or a design query regarding that pump for timely resolution with a complete audit trail.

Designers can continue using their native authoring tools for design updates via the software plug-ins. The Aconex platform supports Open BIM, including IFC (Industry Foundation Classes). At practical completion, a comprehensive and accurate set of interrelated project information – including the model, all of the documentation associated with each of its objects, and an audit trail – can be handed over to the owner for operation.

In a related announcement, the company also launched Dynamic Manuals, a mobile solution for owners and their facility management teams to manage digital operation and maintenance (O&M) manuals in the secure cloud.

Dynamic Manuals is the newest member of the Aconex Handover suite, which also includes Digital Manuals and Smart Manuals for delivering digital O&M manuals at handover.

## Biomax updates KM system

Biomax Informatics AG has launched the BioXM Knowledge Management Environment version 5.1 with new features that increase productivity and extend the underlying semantic concepts of the system.

"In addition to the extended ontology and query modules, BioXM v5.1 introduces responsive tables and gesture-based navigation (like pinch-to-zoom) and more to allow our users to have powerful, sustainable knowledge management literally at their fingertips," said Dr. Sascha Losko, Head of Product Management at Biomax

BioXM v5.1 features responsive web design for use on modern touch-enabled mobile devices such as Apple's iPad or Android-based devices. The BioXM graphical user interface (GUI) automatically adapts to the device used to browse the BioXM-based portal. A BioXM portal configuration can be saved to the device's home screen and used as a highly interactive web app replicating native app behavior.

"In addition to the extended ontology and query modules, BioXM v5.1 introduces responsive tables and gesture-based navigation (like pinch-to-zoom) and more to allow our users to have powerful, sustainable knowledge management literally at their fingertips."

BioXM v5.1 also introduces a redesigned BioXM ontology module that now supports any type of ontology relation and adds advanced ontology inference and reasoning capabilities. Newly developed importers provide greater flexibility with full support for OWL and OBO files. Support for "OWL Imports" enables automatic inclusion of referenced web resources. The updating process has been redesigned to ensure ontologies are always up to date while keeping all user-modified content intact.

http://www.biomax.com/bioxm

## Data Ignition 4.0 tracks duplicate invoices

Selera Labs, an Australian enterprise data analytics startup that got its start on campus at the University of Wollongong, has announced the 4.0 release of its Data Ignition Duplicate Invoice software. Selera Labs CEO Dr Michael Lawler said "Our 4.0 release is a game changer. The accuracy of our new approach to detecting exceptions is changing the way large organisations handle these challenges.

"Our global partners in the finance sector have hailed this as the most sophisticated solution they've seen."

Selera Labs says the Data Ignition platform enables the detection of more duplicate invoice transactions while dramatically reducing the amount of false positive noise compared to legacy approaches by other competitors.

The Duplicate Invoice software provides a simple, low-friction, low-impact tool to continuously monitor 100% of an organization's Accounts/Payable invoicing transactions. The solution identifies potential duplicate invoices via email alerts, eliminates duplicate payments and prevents cash leaving the business. Enterprises can verify controls hourly or daily, instead of retrospectively by quarter or annually.

Research by the Institute of Management and Administration shows that duplicate invoices can cost businesses over $100,000 for every $10 million of spend.

Selera's Data Ignition Duplicate Invoice Detection module allows you to eliminate this "after-the-fact" effort by proactively identifying and blocking duplicate invoices, before they are processed for payment.

Selera Labs clients include marquee brands such as Coca-Cola, BlueScope Steel, One Steel/Arrium and Federal Government offices such as The Department of Immigration and Border Protection.

*http://www.selera.com/*

## Plustek unveils 40 page-per-minute document scanner

Plustek has announced a new workgroup document scanner, the Plustek PS 4080U, featuring a scan speed of 40 pages per minute (80 images-per-minute in duplex mode), a 100-sheet feeder and a daily duty cycle of 4,000 pages per day.

The Plustek PS 4080U is designed to be shared among a workgroup with applications requiring frequent scanning.

The scanner is bundled with a suite of document management and OCR software.

The newly designed feeder enables pages sized from 5cmx-6.4cm up to21cmx5mto be scanned without sorting. A special long-paper mode enables scanning of non-standard sizes: contract and loan forms, EKGs, oil well logs and strip charts.

Industry standard TWAIN ensure compatibility with thousands of scanning and imaging programs. ABBYY FineReader Sprint is included to easily create and manage searchable PDFs at the touch of a button. Built-in image processing ensures high image quality, reduces rescans and increases OCR accuracy.

Key Features:

- Scan documents up to 21cm wide and up to 5m long
- 100 sheet automatic document feeder (over 100 sheets possible by fanning paper edges)
- 40 page-per-minute (80 image-per-min in duplex) scan speed
- Ultrasonic multi-feed detection
- 4,000 page-per-day duty cycle
- Single-touch button automates up to nine jobs including searchable PDF
- Built in automatic image processing
- Energy Star certified

The Plustek PS 4080U will be available in Australia from mid-December for Availability is mid December for $A899 inc. tax.

*www.proscan.com.au*

## ABBYY upgrades OCR apps for iOS

ABBYY has announced improvements to the company's mobile scanning application, ABBYY FineScanner for iOS, which is now available in the Apple App Store free of charge.

ABBYY FineScanner now delivers highly-accurate optical character recognition (OCR) and format retention for scanned documents in 44 languages, including Chinese, Japanese, Korean (CJK), and Cyrillic.

ABBYY FineScanner for iOS turns mobile devices into an all-purpose mobile scanner and document manager that allows users to capture images, create electronic documents in PDF and JPG, and apply OCR to recognize texts for further editing and sharing. The OCR functionality is available either for subscription (per year or per month), or via the unlimited in-app purchase.

Features now include:

- Multiple export destinations: send results by e-mail or to online services such as iCloud Drive, Dropbox, Google Drive, Box, Yandex.Disk, Evernote, or Facebook.
- The ability to scan any printed or hand-written text anywhere
- Edit images (crop redundant background) directly from within Photos, without launching FineScanner.
- Create documents of any size using your iPhone/iPad camera.
- PDF and JPEG support
- Built-in file archiving: save results in a file archive with tags and in-app search capabilities.
- Transfer documents directly to your Mac or PC using iTunes sharing.
- AirPrint support: print out scanned documents directly from your mobile device.

Following the announcement of Abby's upgrades to the FineScanner for iOS, the company announced that the ABBYY Business Card Reader is now free and fully supports iOS8. A free version of ABBYY business card reading application with full support for iOS 8 and flexible licensing options is now available at the Apple App Store.

With the iOS 8 Extension feature, it recognizes contact data from business cards in the Photos, Mail, web browser, or any other application in just two taps. Captured contacts are stored inside the CardHolder, a searchable digital archive of the app.

The Free version allows for as much as 25 recognitions. When they are over, you can buy another 50 recognitions pack through in-app purchase or upgrade to a Premium account using 1-month or 1-year subscription. The Premium version provides unlimited recognition of contact cards and sync contacts between user's iOS and Android-based devices.

*http://www.abbyy.com.au/contacts/*

## Esignatures for SharePoint

Silanis Technology has launched a new pre-integrated e-signature solution, e-SignLive for SharePoint. This application makes it easy for SharePoint users to securely sign and send documents for e-signature inside of SharePoint.

Organizations use Microsoft SharePoint to organize, track and store documents and other content centrally. But when it comes time for signatures or approvals on documents such as contracts, agreements and forms, the process often falls to paper, causing frustrating delays and additional costs.

The added e-signature capabilities increase the productivity of SharePoint users, giving them the ability to quickly get documents signed by customers, partners, suppliers and employees. With a completely electronic process, decision makers can review and approve documents within minutes – in the office, at home or on-the-go using their mobile device. No plug-in or app is needed to sign documents. Because the application connects to e-SignLive, all e-signed documents include embedded audit trails and tamper-evident signatures.

"Businesses often implement SharePoint for immediate needs such as document management and collaboration, to improve on what the business is doing today. With business-critical integrations like e-SignLive for Microsoft SharePoint, they can enhance the tool for easier indexing, filing and retrieval," said Silanis Technology Vice President, Product Strategy, and co-founder, Michael Laurie.

"Because of this integration, our customers have created sophisticated collaboration solutions that have helped them speed up processing by 25 percent, eliminating all document handling including shipping and courier costs and most importantly, speeding up decision making."

*www.silanis.com*

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# Transaction-friendly so you can focus on customers

## Kodak ScanMate
### i1150 & i1180 Scanners

In customer-facing transactions, you need to scan documents, capture information, return documents, and stay focused on your customer. The transaction-friendly, quiet, compact Kodak ScanMate i1150 Scanner scans a mix of materials – documents, IDs, even hard cards – quickly. It's designed for the way you work today – featuring a 60% faster "burst speed" transaction mode for the first 10 documents to turbo-boost customer satisfaction.

| Model | RRP | Rated Speed | Special Features | Warranty |
|---|---|---|---|---|
| i1150 | $459 | 25 ppm | Speeds up to 40 ppm in transaction mode (for the first 10 pages) | 3 yrs RTB |
| i1180 | $899 | 40 ppm | On board Perfect Page and bundled web connectivity | 3 yrs RTB |

i1150 - 25 ppm and up to 3000 pages per day

i1180 - 40 ppm and up to 5000 pages per day

Small, Quiet and Quick

In transaction mode the i1150 speeds up 60 % to capture first 10 documents

On board Perfect Page renowned advanced image processing and web connect ready for cloud based application

***Newly*** launched

**Kodak** **ScanMate** i900 &
**Kodak** i1100 Series Scanner

**Kodak** i2000 Series Scanner

***New Models*** Integrated Flatbed

**Kodak** i2900 Scanner

**Kodak** i3000 Scanner

**Kodak** i4000 Series Scanner

**Kodak** i5000 Series Scanner

Please contact **Kodak Alaris Australia Pty. Ltd.**
Phone: 1300 ALARIS (1300 252747)
Email: askme@kodakalaris.com
www.kodakalaris.com

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